# EDINBURGH MOVING IMAGE STRATEGY

**Prepared For:**
**City of Edinburgh Moving Image Sector**

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**Funded By:**
**Scottish Enterprise Edinburgh and Lothian, City of Edinburgh Council and Scottish Screen**

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APPENDICES

# 1 EXECUTIVE SUMMARY

## 1.1 Introduction and background

The need for a Moving Image Strategy arose from Edinburgh's Cultural Policy, which called for a number of individual strategies that would provide the practical implementation of the cultural objectives.

The Moving Image Strategy joins the following: Theatre Strategy (1996), Music Strategy (1999) and Festivals Strategy (2001), Libraries (2003), Theatre Strategy Review and Dance Strategy (2005). Other strategies recommended by the Cultural Policy include Visual Arts and Crafts, Education and Arts, Heritage, Literature and Poetry and Science and Technology.

Within the Cultural Policy document the strategy is referred to as the Film, Video and Multi-Media Strategy. This moniker was adapted by the plenary group prior to commissioning the strategy to reflect changes in technology platforms and content development techniques and the advent of *Convergence.* Convergence in this sense refers to recent changes in technology and content that have led to the ability to access content through a variety of means – cinema, TV, games consoles, mobile phones, PCs and others.

The overall aims of the strategy are to:

- Encourage the main public sector agencies involved in moving image sector and activities in Edinburgh to work more closely together to develop Edinburgh's reputation as a city of culture
- Identify more cost-effective ways of working and additional sources of funding
- Increase visitor numbers and diversity throughout the year
- Encourage new initiatives which satisfy the partners' objectives
- Encourage and support the involvement of Edinburgh's communities as participants and audience members, and support initiatives that address social inclusion goals
- Assess the contribution of the moving image participants (collectively and individually) to the creative industries in the city and its general economy
- Take into account the role of local, regional, national and international moving image providers

This strategy document firstly maps the moving image sector in Edinburgh before moving on to a number of strategic themes and recommendations. It also provides an overview of major comparative cities that are also developing reputations in moving image. The strategy has been developed through a process of in-depth consultation with a broad cross-section of stakeholders from right across the moving image sector and with reference to the body of relevant existing literature and strategies.

It aims to provide evidence of the extent of the moving image sector and relevant activity in Edinburgh and a strategy for maximising opportunities for the sector. The strategy makes no assumptions relating to the provision of additional public funding and many of the recommendations can be implemented within existing provision.

## 1.2 Policy Backdrop

In addition to playing an important role within cultural development, the moving image sector is a core constituent of the creative industries.

Government has defined the creative industries as:

*"those activities which have their origin in individual creativity, skill and talent, and which have a potential for wealth and job creation through the generation and exploitation of intellectual property"*[1]

and has recognised these industries as increasingly important within their strategies for future economic growth.

From a Scottish perspective, recent strategic thinking driven by the Scottish Executive has given a clear commitment to future, long-term thinking and a focus on sectors where new technology can be harnessed.

The Scottish Executive's *A Smart, Successful Scotland*[2] set out this commitment and has formed the basis for Scottish Enterprise interventions through the cluster strategy for digital media and creative industries.

The Moving Image Sector in Edinburgh has key strenghts in both content and technology development as well as in exhibition, education and festivals and the city is well placed to develop these further by following the set of recommended strategic themes laid out in this document.

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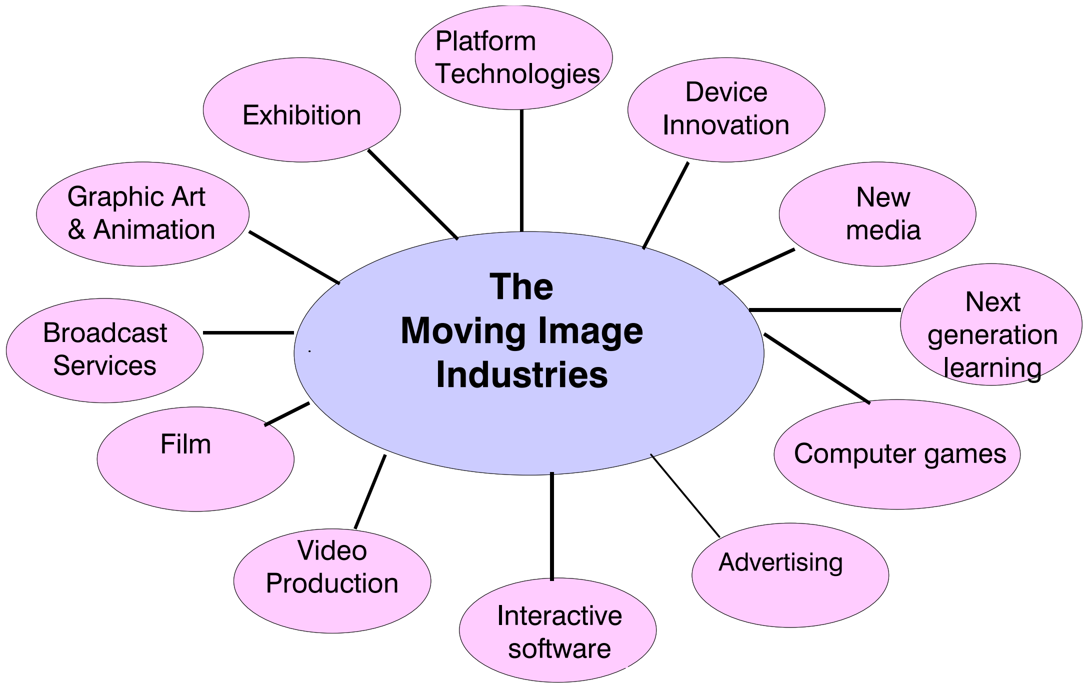
[1] DCMS, *Creative Industries Task Force,* 1998

[2] Scottish Executive, *A Smart, Successful Scotland: Ambitions for the Enterprise Networks,* 2000

## 1.3 Defining the sector

The Moving Image sector covers a broad range of activities.

Defining the moving image sector is an inexact science – individual skills essential to the




industries are drawn from a wide variety of sectors. The moving image industries depend on a variety of skills and talents – some of them technical, some artistic and some commercial. The industries include:

- Hardware and software used to create the content and products
- A vast range of content products and services covering a variety of genre, media and end uses
- The technologies and infrastructure used to deliver the content

Eventually moving image may become an element within all the other strategies and initiatives – reflecting both its pervasiveness and its core importance to modern society. In this sense, moving image creation tools, content and infrastructures increasingly pervade and underpin much of our everyday work and leisure, education and skills as well as continuing to perform its core roles: (borrowing from the BBC) to entertain, educate and inform.

With this in mind, strong themes that run throughout this strategy, forming a basis for our approach to the development of the moving image sector in Edinburgh in the future are: Multi-platform, Multi-disciplinary and New Business Models.

The three main centres of content production for the audiovisual industries in Scotland are Dundee (specialising in computer games), Edinburgh and Glasgow. Glasgow is widely considered to be the main television production location and is also home to the main Scottish broadcasters and support agencies. However, this strategy document provides evidence to show that Edinburgh has a healthy and flourishing moving image sector with strengths in exhibition, education and festivals, advertising, as well as a strong range of production activities from documentary film-making to animation and advertising.

## 1.4 Skills

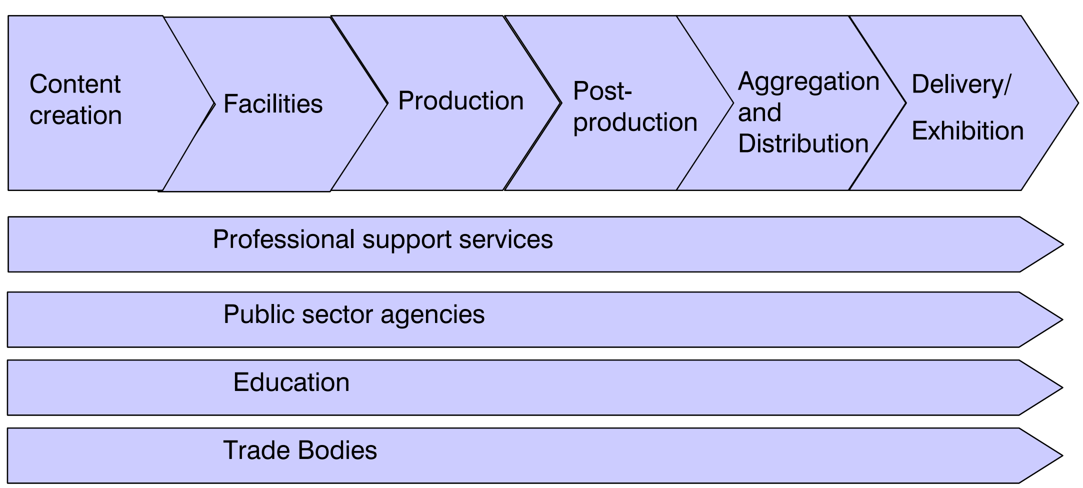
The perceived glamour, vibrancy and associated status connected with the moving image sector are such that there is always over-supply of interested and willing workers. Generally speaking the level of education amongst such new entrants is high, especially the proportion of graduates. Having said this, there are still outstanding issues relating to the supply of appropriate skills for on-going industry needs.

The establishment of the Screen Academy network, including the one at Napier University and Edinburgh College of Art has been the most prominent action addressing this gap – the Screen Academy status bringing with it both industry involvement and a validation of its accreditation in terms of being an industry-level training route. This initiative forms the basis for Edinburgh's position as a key centre of excellence for Moving Image education and skills development.

## 1.5 The Company Base

The digital era has reached a stage where convergence is at last becoming evident
and where it is more useful to approach the industry from the basis of one common value chain rather than attempting to consider sub-sectors such as film, TV, interactive, games, mobile content and e-learning as having separate value chains.

A mapping of the moving image sector in Edinburgh identified a total of **212** moving image




sector businesses operating in Edinburgh – representing almost all elements of the value chain.

There is evidence of a strong moving image cluster developing organically in Leith (EH6) – stretching also to Inverleith (EH3) to the South-West, Granton and Pilton (EH5) to the West and Lochend (EH7) to the East. There is also a collection of relevant companies in Edinburgh city centre (EH1 and EH2). Given Leith's status as the single largest redevelopment area for the City of Edinburgh through CEC's "Leith Initiative", and the current prevalence of moving image related activity within the cluster, there is a potential synergy for helping to stimulate the sector's growth within the wider regeneration plans.

### *1.5.1 Production*

Our mapping research identified 68 moving image production companies operating in Edinburgh (at April 2006). Most of the production companies in the city are small with additional resources acquired through use of freelancers during production but as a collective group they represent a significant production centre of excellence. The production sector has already taken steps to organise itself around a networking group that meets on a monthly basis. Edinburgh boasts a strong range of current and alumni production talent, which the city can use to further stimulate excellence within the sector.

### *1.5.2 Advertising*

Edinburgh has a strong tradition of advertising, with a total of **41** advertising agencies in the city. The Leith Agency, Edinburgh's largest advertising agency sits alongside medium-sized companies such as The Union and Newhaven Agency and a whole host of smaller agencies and freelancers. The advertising industry is facing challenging times at the present time – due to falling audience figures, centralisation of budgets and the challenges of new technolgy formats – however, some of Edinburgh's advertising agencies are rising to the challenge and are emerging with exciting new business models and modes of creativity.

### *1.5.3 Facilities*

There have been suggestions that Edinburgh should look to set up studios for film or TV. However, this is not an option that makes financial sense at this stage given the increasing prominence of Central and Eastern European studios for feature films and an over-supply of TV studios in the UK. There is a good range of small studios located in Edinburgh that are considered to be sufficient to meet current levels of demand. Improvements could be made though to communicate their existence to the production community.

### *1.5.4 Aggregation/distribution and delivery*

For Edinburgh, the main gap in terms of value chain coverage is in aggregation and distribution and delivery – put simply there is no major buyer located in the city. This was identified by many of the research participants as a major weakness for the sector. However, Edinburgh is close enough to take advantage of the broadcasters based in Glasgow and with travel to London becoming increasingly cheap and easy, this gap becomes less of an issue.

The Scottish Institute for Documentary (eca)'s involvement with the DocSpace project provides support for the distribution of documentary films and the Edinburgh Filmhouse has some additional involvement in distribution but there is little other activity relating to this part of the value chain.

### *1.5.5 Exhibition*

Edinburgh is well served for exhibition – with a range of provision from mass market and broad appeal through to exhibition of amateur, student and community productions. There are a number of multiplexes in the city and a number of independents, including the Filmhouse, which provides strong International and art-house programming year round as well as being the base for the Edinburgh International Film Festival.

### *1.5.6 Education*

The areas of education that are relevant to the moving image strategy include:

- Formal education (schools)
- Further education (FE)
- Higher education (HE)
- Continuing professional development (CPD)
- Community skills and access initiatives

Education providers in each of these categories are already pioneering a range of moving image related courses, provisions and using moving image techniques. There are also strong and productive links beginning to form between these.

Edinburgh enjoys a strong reputation for education in a number of areas. This has been reflected recently in the award of Screen Academy status to Napier University and Edinburgh College of Art – an important development in the city's reputation as a centre for moving image. Screen Academy is not the only relevant strength - the University of Edinburgh's Department of Informatics, Queen Margaret University, the provision of FE colleges and a range of community education initiatives and activities in schools all help to form a rich range of moving image related educational experiences.

There are opportunities to increase and expand links between some of these educational providers: specifically in meeting latent demand for CPD and to encourage collaboration between technology and content focused educational research.

### *1.5.7 Business Support*

There are a number of existing sources for business support in Edinburgh, the main agencies being Scottish Enterprise, Business Gateway, Edinburgh Film Focus and Cultural Enterprise Office. There was a perceived lack of tailored support but this may be addressed through better information and brokerage to existing providers as well as through increased mentoring and networking initiatives.

## 1.6 Festivals and Place-making

### *1.6.1 Festivals*

Edinburgh hosts three major moving image related festivals: Edinburgh International Film Festival, MediaGuardian Edinburgh International Television Festival (which is actually organised from London) and the Edinburgh Interactive Entertainment Festival. These festivals were considered by a broad cross-section of stakeholders to be major strengths in Edinburgh's moving image sector – and core to Edinburgh's reputation as a top tier tourist and moving image sector city. There were indications that the festivals should take a forward-looking approach, incorporating new platforms and innovative content.

### 1.6.2 *Edinburgh- Inspiring Capital*

Edinburgh has recently undergone a city-wide rebranding exercise, which has resulted in new visuals and a strap-line. Edinburgh – Inspiring Capital is an excellent fit with the sentiment and recommendations of the moving image strategy, which embraces a similar set of elements and values. The Moving Image Strategy is well timed to fit in with the re-branding both as an element of inspiration and as a medium through which to convey other inspirational messages.

### 1.6.3 *Public Space Broadcasting*

Some of the moving image stakeholders were keen to investigate the opportunity of Edinburgh joining the Big Screen Initiative – Public Space Broadcasting (PSB). By taking part as one of the next set of cities in the PSB network, Edinburgh can add to its exhibition opportunities, help attract a broader set of audiences for its moving image content and can raise the public profile of its moving image sector.

The community-focused agencies play an important role within the city's moving image sector. Moving image is pervasive within modern society – almost all citizens have access to moving image content through TV, cinema, games or mobile content. Access in this area is about using moving image to enhance the experiences of citizens, thereby helping them to gain literacy in the modern world and to express their own stories and experiences.

## 1.7 Community initiatives

Edinburgh is fortunate to have some well established community initiatives that produce high quality work and have good links with other moving image stakeholders. These are Pilton Video, Young People Speak Out, Media Education Ltd and Whale Arts Centre. Several stakeholders mentioned the passing of Mediabase – the Media Access centre that closed in 2005 – as a significant loss. Otherwise the general impression was of a healthy level of community sector activity, benefiting some of Edinburgh's most deprived communities.

## 1.8 Comparators

From looking at all the comparators (Manchester, Liverpool, Newcastle/Gateshead/Middlesbrough, Rotterdam, Cologne, New York) the following arise as success factors for cities that have built strong moving image sectors:

- Access to major buyers – although the city may be able to grow its sector where access is available in another city that is close by
- Critical mass of moving image businesses in the city
- Links between the industry and the education sector
- Commitment from public sector agencies to ease the task of filming in the city
- High profile film and moving image festivals, preferably with a commercial and forward-looking focus
- Strong public sector agencies supporting the moving image sector
- Commitment to cultural regeneration in the place-making and economic development strategies – the availability of regeneration grants is an important factor and Edinburgh's ineligibility for structured funding is a major challenge to large scale public investment

- Access to deep talent pool

Edinburgh suffers due to ineligibility for the kinds of European regeneration funding that has helped other cities to grow their moving image (and wider cultural) infrastructure.

It also lacks a major buyer of content (outside of advertising and commercial work). But for all the other key factors Edinburgh is well positioned. This strategy aims to help Edinburgh's moving image strategy to build on its current strengths and take advantage of opportunities arising that will grow the sector, its impact and its contribution to the culture and economy of Scotland.

## 1.9 SWOT

A SWOT analysis of Edinburgh's moving image sector produced the following results:

| STRENGTHS | WEAKNESSES |
|---|---|
| Location and heritage<br>Capital City/Parliament City Status<br>Culture and lifestyle<br>Festivals (TV and Film)<br>Key sub-sectors – advertising, animation, documentary<br>Connectivity<br>Education Institutions<br>R&D and Innovation<br>Availability of Graduates<br>Supportive Local Authority<br>Existing connections and collaboration | Too much emphasis on Edinburgh's past<br>Lack of critical mass in production sector<br>Lack of major buyers<br>Shortages of experienced talent<br>Lack of finance options<br>Broadcasters not present in the city<br>Lack of facilities houses and post-production<br>Current lack of differentiation in moving image<br>Parking and logistics can be difficult<br>Links between stakeholders not substantiated<br>Availability of affordable property and premises |
| **OPPORTUNITIES** | **THREATS** |
| Build networks of common interest<br>Exploit technology and content<br>Extend the role of moving image in tourism strategy<br>Support new audiences and new involvement<br>Develop and support new platforms<br>Forge better links to the outside<br>Build on Screen Academy status<br>Build moving image into the Edinburgh brand<br>Share resources and joint working initiatives<br>Differentiate from Glasgow<br>Establish National status for strongest elements<br>Develop the moving image cluster | The "do nothing" scenario<br>Edinburgh could become uncompetitive<br>Lose key elements such as the EIFF<br>Over-emphasis on film presents sustainability problems<br>Failure to build on new developments<br>Lack of communication between stakeholders<br>Lack of commitment to collaborative working |

## 1.10 Recommendations

We have identified a number of recommendations based around the following themes:

Theme 1: Pioneering Digital Technology and Content
Theme 2: Supporting the Sector's Growth
Theme 3: International Links
Theme 4: City of Next Generation Learning
Theme 5: Developing the Talent Pool
Theme 6: Physical and Creative Environment
Theme 7: Moving Image Centre
Theme 8: Looking Outwards, Together

# 2 INTRODUCTION AND BACKGROUND TO THE STRATEGY

## 2.1 Cultural Policy for the City of Edinburgh

The Cultural Policy for the City of Edinburgh was published in 1999. The document provides a description of the broad range of cultural activity supported by the Council and provides an overview of the Council's commitment to culture, its priorities and the areas in which it will provide support. This commitment is expressed in a number of policy objectives that are expected to be achieved through a series of individual strategies containing action plans and targets.

The cultural objectives are as follows:

- To enable all of Edinburgh's citizens and visitors to participate in, and enjoy, the widest cultural experience, including targeting initiatives to combat social exclusion
- To encourage the highest standards of creativity and excellence in all aspects of cultural activities
- To foster partnership working with organisations throughout the city which are involved in working within, or supporting, cultural activities, such as higher and further educational establishments, national institutions, museums and galleries, the commercial and private sector
- To develop lively and sustainable cultural industries, among which should be those evolving with the emergence of new technologies
- To develop and support the infrastructure which sustains Edinburgh's cultural industries and activities
- To recognise and promote the importance of culture for children and young people
- To acknowledge and support the contribution of cultural activities to the lifelong learning process for the wider community
- To preserve and interpret Edinburgh's heritage
- To promote locally, nationally and internationally the expression of Edinburgh's diverse cultural identity, and to recognise the reciprocal benefits of widening cultural experience through international contacts
- To support and develop those cultural activities which enrich and extend personal and community development

To achieve these aims, the Cultural Policy called for a number of individual strategies that would provide the practical implementation of the cultural objectives.

The Moving Image Strategy will join the following: Theatre Strategy (1996), Music Strategy (1999) and Festivals Strategy (2001), Theatre Strategy Review and Dance Strategy. Other strategies recommended by the Cultural Policy include Visual Arts and Crafts, Education and Arts, Heritage, Libraries, Literature and Poetry and Science and Technology.

## 2.2 The Moving Image Strategy

Within the Cultural Policy document the strategy is referred to as the Film, Video and Multi-Media Strategy. This moniker was adapted by the plenary group prior to commissioning the strategy to reflect changes in technology platforms and content development techniques and the advent of *Convergence.* Convergence in this sense refers to recent changes in technology and content that have led to the ability to access content through a variety of means – cinema, TV, games consoles, mobile phones, PCs and others.

The plenary group for the Moving Image strategy represents a diverse group of stakeholders from arts, cultural, educational, commercial and community-oriented backgrounds including:

- Scottish Screen
- Scottish Arts Council
- Scottish Enterprise (Edinburgh and Lothian)
- Edinburgh International Film Festival
- Edinburgh Filmhouse
- Pilton Video
- Edinburgh College of Art
- Napier University
- Edinburgh Film Focus
- Production sector
- City of Edinburgh Council: Culture and Leisure, Children and Families, Economic Development

At the outset of the consultations, the plenary group identified the following objectives for the moving image strategy[3]:

- To reflect the importance of the moving image sector as a key cultural contributor city-wide
- To identify existing and potential benefits for the city's citizens, economy and culture
- To evaluate current support for, and links between production, education, distribution and exhibition and make recommendations as to future issues and opportunities
- To consolidate information which describes the aspects of infrastructure in the moving image field and thereby identify the scope and value of the sector
- Identify added value and potential connected delivery both in terms of strategy and implementation
- To identify the common interests (objectives and activities) of the stakeholders
- To examine constraints on the sector in Edinburgh and identify opportunities for support and development
- To review the broader market context in which the sector operates
- To assess the value of Edinburgh's cultural reputation in terms of the moving image to judge better the international potential for developing inward economic investment
- To establish the place of Edinburgh in direct comparison with other provision established in places such as Toronto and Manhattan Island

[3] City of Edinburgh Council, *Consultancy Tender, Moving Image Strategy,* July 2005

- To investigate whether there are advantages in cohesive public presentation of the relationship between these areas or whether the strategy should be more about building an effective and resourced environment – or both
- To identify the links between cultural and commercial sector stakeholders in deliverables in the long and short term and to recommend effective mans of illustrating this and communicating it to funders and others
- To relate potential outcomes to existing City and national strategies, policies etc including the recent cultural policy statement
- Group members should seek to exploit the opportunity to address the Cultural Commission in the context of the Edinburgh sector framework
- To assess the potential of a moving image centre in the city
- To recommend mechanisms by which group members can create centres of excellence, linked strategically and practically where appropriate
- To assist and inform the process of a sub strategy for developing audiences for film and the moving image
- To make recommendation as to resources required to implement strategy
- To do all of the above in the context of the long term sustainability and development of the sector

The overall aims of the strategy are to:

- Encourage the main public sector agencies involved in moving image sector and activities in Edinburgh to work more closely together to develop Edinburgh's reputation as a city of culture
- Identify more cost-effective ways of working and additional sources of funding
- Increase visitor numbers and diversity throughout the year
- Encourage new initiatives which satisfy the partners' objectives
- Encourage and support the involvement of Edinburgh's communities as participants and audience members, and support initiatives that address social inclusion goals
- Assess the contribution of the moving image participants (collectively and individually) to the creative industries in the city and its general economy
- Take into account the role of local, regional, national and international moving image providers

# 3 POLICY BACK-DROP

## 3.1 Cultural Policy and the Cultural Rights Agenda

"Culture consists of all distinctive, spiritual and material, intellectual and emotional features which characterise a society or social group" [4]

The Scottish Executive has in recent times stated its support for Culture as a multi-faceted tool, providing impact and benefit to communities in terms of social and economic benefits.

From the publication of the National Cultural Strategy in 2000[5], the Cultural Commission was then charged with the task of reviewing cultural provision in Scotland and providing practical recommendations on how cultural policy could be implemented.

The Scottish Executive announced the details of a cultural policy statement in April 2004. This outlined an agenda for reviewing the cultural sector and the associated institutions and agencies involved. The Cultural Commission looked at how cultural rights and entitlements can be addressed.

In advance of the Commission's report, in 2004 the Scottish Executive's Policy Statement[6] outlined a vision for culture in Scotland that includes:

"Establish Scotland as a vibrant, cosmopolitan, competitive country and an internationally recognised creative hub"
"The key values of access and excellence will be guiding principles"

In an additional consultation document, the Department for Culture, Media and Sport (DCMS) states its view of culture as

"At the heart of regeneration"[7]

Moreover, within its own Cultural Policy, the City of Edinburgh Council identifies that:

*"… culture is not an optional extra, but an essential element in lifelong learning, economic development, social regeneration, and in the quality of life and personal well-being of individuals"*

Moving image plays an increasingly important role within the Cultural sector. Film is amongst the most widely accessed forms of culture. A study commissioned by the Scottish Arts

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[4] UNESCO World Conference on Cultural Policies, Mexico, 1982

[5] Scottish Executive, *Creating our Future: Minding our Past, The National Cultural Strategy,* 2000

[6] Scottish Executive, *Cultural Policy Statement*, April 2004

[7] Department of Culture, Media and Sport, *Culture at the Heart of Regeneration,* June 2004

Council in 2004[8] found that while 25% of its respondents had visited an art gallery, and 30% a museum in the past 12 months, around 50% had been to the cinema. Moving image also includes content delivered to personal and home platforms such as broadcast TV, DVD and video, mobile phones, games consoles and PCs - so that almost all households in Scotland are able to access some form of moving image content.

Within the cultural sector, moving image tends to be more extensively commercialised than other art-forms or activities (perhaps with the exception of some forms of music). The cultural aspects of moving image overlap with the workings of established industries – in particular, the film industry, broadcast TV and increasingly mobile and new media content. Quantifying the level of support for moving image related culture in its widest definition would be a major task, given that the public sector agencies do not recognise moving image as a separate line on their accounts.

However, statements within numerous strategy documents point to the increasing role of moving image within other art-forms. For example, within the Scottish Arts Council's Dance Briefing for 2004 we find the statement:
"we wish to encourage a wide range of dance including work that is created or presented using new media"[9]
Additionally, there are details of a collaboration between Scottish Arts Council, the Arts Council of England and the BBC that culminated in the screening of "Dance Film Academy" in spring 2005.

The Scottish Arts Council's position on Visual Arts likewise shows keenness to:
"encourage excellence and innovation, both in the creation and presentation of work"[10]
Presumably innovation could well include the use of new platforms and technologies including those that include moving image.

And in its support of literature, the Scottish Arts Council, in partnership with Scottish Screen, Scottish Enterprise and the Higher Education sector provides Writers Factory: a fund that supports screen writing bursaries and training across moving image platforms (film, TV, games and educational resources).

## 3.2 Moving image as a core constituent of creative industries

In addition to playing an important role within cultural development, the moving image sector is a core constituent of the creative industries.

Government has defined the creative industries as:
*"those activities which have their origin in individual creativity, skill and talent, and which have a potential for wealth and job creation through the generation and exploitation of intellectual property"*[11]

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[8] Cited in Scottish Arts Council, *Annual Report 2004/5*

[9] Scottish Arts Council, *Dance Briefing 2004/5*

[10] Scottish Arts Council, *Guide to Funding 2006/7*

[11] DCMS, *Creative Industries Task Force,* 1998

and has recognised these industries as increasingly important within their strategies for future economic growth.

The Creative Economy Programme was launched in November 2005 in order to develop a strategic vision for the creative industries and tackle the very specific issues that will make a real difference to the productivity and growth of the UK economy.

Following on from this, in March 2006, the Secretary of State for Culture, Media and Sport (Tessa Jowell) stated that she wanted to see a new framework and a new policy position for the creative industries in place by the end of the year. The likelihood is that this framework for action will be published in the form of a Green Paper. The aim of this development will be to produce a framework which can be shared at national, regional and local level and which will unblock the barriers to growth and exploit the opportunities for our country's Creative sectors.

Moreover, the Secretary of State has also described the Creative Industries as being *"at the heart of our policies for strong regions and vibrant cities"* – a clear indication of the growing status of the creative industries within the central government agenda. She has also gone on to suggest that the creative industries will play a fundamental role in the UK's economic future:

*"…our economic future lies in high-value, knowledge intensive industries…Put simply, to make the UK the world's creative hub"*

From a Scottish perspective, recent strategic thinking driven by the Scottish Executive has given a clear commitment to future, long-term thinking and a focus on sectors where new technology can be harnessed.

The Scottish Executive's *A Smart, Successful Scotland*[12] set out this commitment and has formed the basis for Scottish Enterprise interventions through the cluster strategy for digital media and creative industries.

It is now coming up to five years since the first phase of Scottish Enterprise's cluster strategy for digital media and creative industries was first approved.

The strategy, which has been envied and emulated across some of the UK regions, has been ambitious and varied in its work. Key projects have included networking initiatives such as Creative Edinburgh and the Creative Entrepreneurs' Club, the information and research services provided through The Research Centre for TV and Interactivity and Interactive Tayside; property-centred projects such as Seabraes Yards in Dundee and Pacific Quay in Glasgow; and R&D stimulation through the Digital Media portfolio within the Proof of Concept

[12] Scottish Executive, *A Smart, Successful Scotland: Ambitions for the Enterprise Networks,* 2000

fund and the establishment of the co-production and the co-investment funds as well as ITI Techmedia.

In addition, the cluster team has supported numerous individual businesses and provided knowledge and research through its commissioned studies across digital media and creative industries.

Over the five-year period, the “Digital Cities” have really begun to take shape – within the Central Belt towns and cities of Edinburgh, Glasgow, Livingston and Stirling and also stretching to Dundee, Aberdeen, Perth and down to Ayrshire.

Scottish Enterprise’s creative and digital industries cluster has focused its priorities on the following:

- A flexible and informed businesses infrastructure for creative industries
- Expansion and development of talent and skills base available to creative and digital industries
- Increased innovation with ready access to local and global research
- Greater internationalisation

The development of the cluster has also led to non-econometric benefits such as:

- A growing feeling of community and collaboration within the cluster
- The emergence of complex supply and value networks
- Technology and knowledge transfer between industry and academia
- Raising the profile of Scotland as a centre for digital media and creativity
- Raising Scotland’s international profile and global reputation for innovation Stimulating awareness of the cluster among other public sector agencies and government bodies

These additional non-econometric benefits are difficult to measure, but nonetheless constitute the true essence of a successful cluster and provide evidence of the level of success of Scottish Enterprise’s interventions.

In particular, the cluster team’s endeavours to act as an interface between industry, academia and the public sector is notable. Initiatives such as the Proof of Concept fund (which is being treated with great interest by the English regions) and the Cultural Enterprise Office (which again is acting as a model for other regions) are good examples of the agency’s role in stimulating collaboration and a commitment to providing optimal support for the creative industries.

Scottish Enterprise has recently adjusted its position on the Creative Industries and Digital Media as a “named” cluster as they have recently been absorbed into the new “Electronic Markets” category, Scottish Enterprise continues to strive to demonstrate the best possible value for its interventions and to support forward-looking digital media and creative industries development.

The agency is faced with the task of distinguishing drivers and trends from fads in order to work towards supporting the cluster towards sustainable growth rather than to the equivalent of another technology sector crash. Some of the key drivers (at a high level) for the sector being, for example, the shift to multi-media mobile based on 3G networks and advanced handset capabilities; the convergence of broadcast media, telecoms and personal entertainment; the move towards digital switchover in TV; the shift to downloads in the media entertainment industries; to name but a few.

Scottish Enterprise is well aware of the need for Scottish businesses in all sectors to extend market boundaries and compete on a global scale – put simply, the domestic markets are too small and restrictive to support the myriad of small innovative businesses.

The Scottish Arts Council (SAC) has had some overlap in interests with Scottish Enterprise with respect to the Creative Industries, as does the National Screen Agency, Scottish Screen. The SAC is likely to be combined with Scottish Screen as Creative Scotland – with a change remit and way of supporting arts, culture and creativity in Scotland.

According to the sector skills council for the audio-visual industries, Skillset, some of the moving image sector industries demonstrate uncommonly high contributions to economic value when measured on a per head basis. For example: film and video distribution has the highest Gross Value Added[13] (GVA) per head (almost £200,000) of the entire service sectors (for which data is available) in the UK. Television and Radio contributes average GVA of £66,900 per head compared with a national average or £31,300 (average across all employment). Film and Video is close behind. In total the audio-visual industries (roughly translating to film, TV and video plus radio and not including interactive media) contribute around 2.4% to GDP while only employing around 1% of the total workforce.

Growth predictions for the Creative Industries are promising. For example KPMG has forecast 46% employment growth and 136% output growth in the UK creative industries sector between 1995 and 2015. At today's levels the estimate is that one in every £12 of total UK GVA is produced by the creative industries and that in total these industries contribute £11.4 billion to UK balance of trade – well ahead of sectors such as construction, insurance and pharmaceuticals.

However, measurement of the economic impact of creative industries interventions can be problematic for several reasons and this can put the public sector off providing support. For example, creative industries often incur relatively high risk compared to other sectors, their asset-bases are predominantly based on intellectual capital which makes them difficult to value and their working practices are largely dependent on freelance resources and partnerships that do not always qualify as new jobs under public sector support definitions.

[13] Gross Value Added (GVA) measures the contribution to the economy of each individual producer, industry or sector in the United Kingdom

Volterra Pacific's report[14] on the new economies of the creative industries argues that the economic impact approaches are insufficient measurements for understanding the true impact of creative industries and creative clusters.

The study begins to lay down new measurement approaches that take into account longer time-scales, broader frames of influence and an integrated cultural/economic perspective. This work, which emanated from the University of Queensland is regarded as groundbreaking.

This is very much in line with the findings of the Cultural Commission and is likely to strike chords with both the Scottish Executive and with the public sector agencies that are charged with the development of the Creative Industries following the Cultural Commission's reviews.

Within the creative industries, the moving image sector forms a key constituent part and as such is important from cultural, economic and social perspectives of the modern world.

[14] Volterra Pacific, *The New Economies of the Creative Industries*, 2005

# 4 MOVING IMAGE SECTOR INDUSTRIES

## 4.1 The Sector Defined

The Moving Image sector covers a broad range of activities.

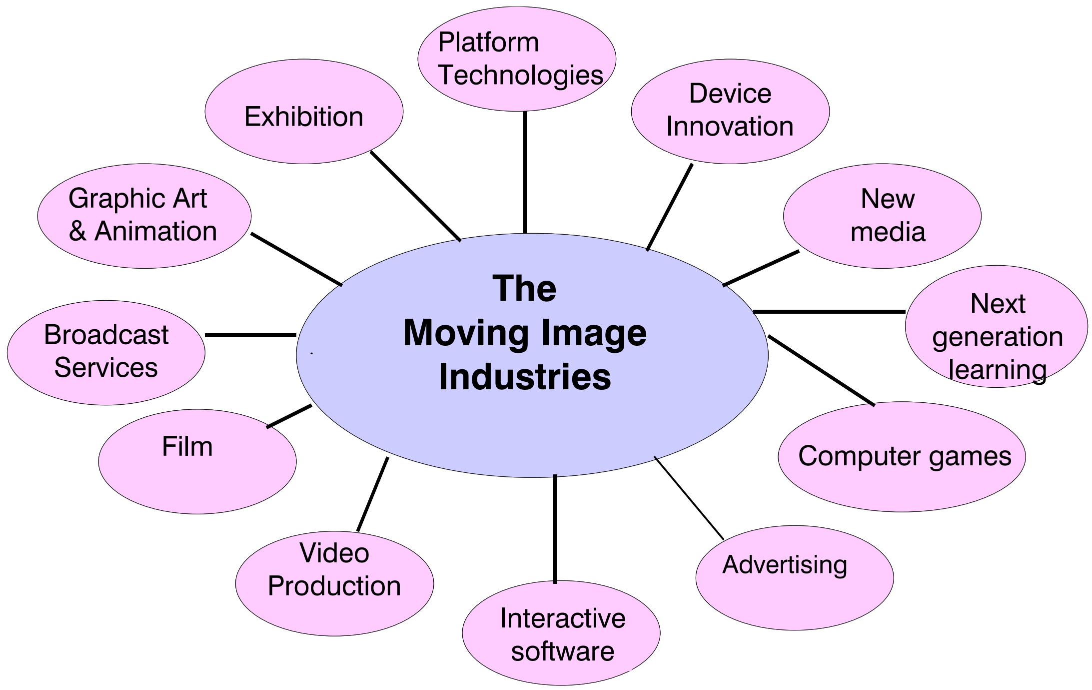


**Figure 1 - The Core Components of the Moving Image Sector, nmp 2006**

Defining the moving image sector is an inexact science – individual skills essential to the industries are drawn from a wide variety of sectors. The moving image industries depend on a variety of skills and talents – some of them technical, some artistic and some commercial. The industries include:

- Hardware and software used to create the content and products
- A vast range of content products and services covering a variety of genre, media and end uses
- The technologies and infrastructure used to deliver the content

Figure 1 gives a diagrammatic view of the core components that make up the Moving Image Industries. This is an expanding group, given that moving image is becoming a crosscutting tool used across a range of other industries and art forms. Eventually we can envisage a time when moving image in itself is an element within all the other strategies and initiatives – reflecting both its pervasiveness and its core importance to modern society. In this sense, moving image creation tools, content and infrastructures increasingly pervade and underpin much of our everyday work and leisure, education and skills as well as continuing to perform its core roles: (borrowing from the BBC) to entertain, educate and inform.

**Multi-platform**

Moving image, of course, includes Film – the oldest and most celebrated moving image platform. But it also covers TV and increasingly new platforms and devices – mobile handsets, portable and fixed games devices (Playstation, X-Box, Nintendo and so on), computer monitors, large public screens, and others to follow no doubt.

**Multi-disciplinary**

Moving image also covers the full range of genre from fiction to documentary to animation to reportage or to art. And also includes commercial productions and advertising.

**New business models**

Moving image covers developments in content – but also developments in new technology platforms, in technologies that support new business models for accessing, producing and displaying content.

**Multi-purpose**

Increasingly moving image is playing a more important role within activities such as education – both formal and informal learning for children, professionals and life-long-learners. The same is true of the wider Visual Arts circuit – where video and filmmaking are firmly established as media at the artists' disposal.

## 4.2 The moving image sector in Scotland[15]

Total annual spending on content for the Moving Image sector through Scottish companies is estimated at around £200 million, around 5% of the UK total spend. Using this measure of scale, television production is by far the largest of the Moving Image industries, both in Scotland and across the UK as a whole.

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[15] The data presented in this section is the most recent available from public sources

| **Estimated Content spend through Scottish Companies (£m)** | **Total Scotland** | **Total UK** | **Scotland as % of Total UK** |
|---|---|---|---|
| Television | | | |
| • Network | 66 | | |
| • 'Regional' | 66 | | |
| • Gaelic | 9 | | |
| • Multichannel | 8 | | |
| Total | 149 | 3,000 | 5% |
| Feature Film | | | |
| • Local spend | 6 | | |
| • Other | 23 | | |
| Total | 29 | 200 | 14% |
| Animation (excl. Games) | 3 | 100 | 3% |
| Interactive Screen | 5 | 210 | 2% |
| Corporate Video | 18 | 375 | 5% |
| TV & Radio Commercials | 8 | 423 | 2% |
| TOTAL | 212 | 4,308 | 5% |

**Table 1: Estimated content spend through Scottish Companies - 2001**[16]

Expanding the picture beyond purely production to encompass the pre-and post-production and distribution parts of the value chain, and using sales as a measure[17], indicates a more significant position for Scotland in the UK context (see Table 2 below) – around 9% of the UK total. Television remains the dominant industry within the mix, however, accounting for 80% of Scottish sales and around two thirds of the UK total.

[16] PACT Scotland, *An Audit of the Screen Industries in Scotland: A Report for the Scottish Executive, PACT Scotland, Scottish Enterprise, Highlands and Islands Enterprise and Scottish Screen,* 2003

[17] And also using somewhat different industry definitions, based on SIC codes

| Screen Industry Sales by Region - 2002 | Scotland (£ '000) | Scotland (%) | UK (£'000) | UK % of Total | Scotland % of UK |
|---|---|---|---|---|---|
| Film – Pre-Production | 4,562 | 0.3% | 139,895 | 0.7% | 3.3% |
| Film – Production | 24,331 | 1.3% | 889,891 | 4.5% | 2.7% |
| Film – Post-Production | 1,521 | 0.1% | 152,564 | 0.8% | 1.0% |
| Film - Distribution | 60,771 | 3.3% | 2,362,550 | 12.0% | 2.6% |
| **Film – All Sectors** | **91,185** | **5.0%** | **3,544,900** | **18.0%** | **2.6%** |
| Television – Pre-Production | 117,459 | 6.4% | 1,124,460 | 5.7% | 10.4% |
| Television – Production | 1,013,088 | 55.3% | 8,000,136 | 40.6% | 12.7% |
| Television – Post-Production | 88,095 | 4.8% | 1,699,316 | 8.6% | 5.2% |
| Television - Distribution | 249,601 | 13.6% | 2,532,974 | 12.8% | 9.9% |
| **Television – All Sectors** | **1,468,243** | **80.2%** | **13,356,886** | **67.7%** | **11.0%** |
| Corporate Video – Pre-Production | 2,645 | 0.1% | 30,425 | 0.2% | 8.7% |
| Corporate Video – Production | 81,140 | 4.4% | 708,505 | 3.6% | 11.5% |
| Corporate Video – Post-Production | 2,645 | 0.1% | 88,622 | 0.4% | 3.0% |
| Corporate Video - Distribution | 3,943 | 0.2% | 113,846 | 0.6% | 3.5% |
| **Corporate Video – All Sectors** | **90,373** | **4.9%** | **941,398** | **4.8%** | **9.6%** |
| Commercials – Pre-Production | 47,855 | 2.6% | 442,954 | 2.2% | 10.8% |
| Commercials – Production | 86,894 | 4.7% | 887,422 | 4.5% | 9.8% |
| Commercials – Post-Production | 3,562 | 0.2% | 144,211 | 0.7% | 2.5% |
| Commercials - Distribution | 42,434 | 2.3% | 408,212 | 2.1% | 10.4% |
| **Commercials – All Sectors** | **180,745** | **9.9%** | **1,.882,799** | **9.5%** | **9.6%** |
| Total – Pre-Production | 172,521 | 9.4% | 1,737,734 | 8.8% | 9.9% |
| Total – Production | 1,205,453 | 65.8% | 10,485,954 | 53.2% | 11.5% |
| Total – Post-Production | 95,823 | 5.2% | 2,084,713 | 10.6% | 4.6% |
| Total - Distribution | 356,749 | 19.5% | 5,417,582 | 27.5% | 6.6% |
| **Total – All Sectors** | **1,830,545** | **100.0%** | **19,725,983** | **100.0%** | **9.3%** |

**Table 2: Screen Industry Sales for the UK and Scotland - 2002**[18]

When reviewing these figures we need to remember that sales are calculated as the sum of all transactions along the value chain so we should not take the total sales across the value chain as an indication of the total size of the moving image sector. There is a significant level of double-counting where a company sells pre-production services to a production company which produces a film that is distributed by a specialised distribution company. This methodology inevitably produces a larger figure than that given by the final output of a value chain ("Gross Value Added", or GVA). For example, total sales by the UK screen industries

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[18] Cambridge Econometrics, *Economic Impact of the UK Screen Industries: A Report submitted to the UK Film Council and the National and Regional Screen and Development Agencies*, May 2005.

were £19.7bn in 2002, while the ABI estimate of GVA from these transactions was only £8.1bn."

The best available measure of the Moving Image sector in terms of its importance to the economy is probably that based upon GVA from work recently undertaken by both DCMS and the Scottish Executive (see Table 3 below). This approach includes Radio within the definition, but does avoid the double counting of sales which affects Table 2 above. On this value added measure, Scotland's share of total UK for the years for which data is available is only some 2% across the Screen Industries.

| **Scotland GVA** | **Advertising** | | **Video, film and photography** | | **Radio and TV** | | **Total** | |
|---|---|---|---|---|---|---|---|---|
| | **GVA (£m)** | **% of UK Total** | **GVA (£m)** | **% of UK Total** | **GVA (£m)** | **% of UK Total** | **GVA (£m)** | **% of UK Total** |
| **1998** | 78.9 | 2.3% | 54.1 | 3.0% | 94.5 | 2.6% | 227.5 | 2.5% |
| **1999** | 87.6 | 1.6% | 42.1 | 2.0% | 143.1 | 3.1% | 272.8 | 2.2% |
| **2000** | 95.0 | 1.6% | * | NA | * | NA | NA | NA |
| **2001** | 107.3 | 2.0% | * | NA | * | NA | NA | NA |
| **2002** | 140.9 | 2.3% | * | NA | * | NA | NA | NA |

* = Denotes disclosive data.

**Table 3: Scotland's Screen Industries - Gross Value Added**[19]

At the UK level (for which more recent data is available), the three industry groupings illustrated in Table 3 generated GVA of £13.4 billion in 2003 - £5 billion from Advertising, £2.2 billion from Video, film and photography and £6.2 billion from Radio and TV. Average annual growth over the period from 1997 to 2003 for UK GVA was 4% for Advertising, 1% for Video, film and photography and 8% for Radio and TV.

A fourth measure of the importance of the Moving Image sector is provided by employment statistics. Table 4 below uses the same definitions developed and used by both DCMS and the Scottish Executive in Table 3.

The likely explanation for the significant increase in Scottish Radio and TV employees from 1998 to 1999, which is followed by a gradual reduction over the next three years is BSkyB's rapid expansion of employment at its Livingston and Dunfermline sites to 6,000 employees. This occurred when the satellite broadcaster expanded its digital satellite services in 1999,

[19] DCMS, *Creative Industries Estimates Statistical Bulletin,* October 2005

following which the numbers employed could be expected to have fallen as BSkyB's existing subscriber base was converted from analogue to digital services.

| Scotland Employees | Advertising | | Video, film and photography | | Radio and TV | | Total | |
|---|---|---|---|---|---|---|---|---|
| | No. | % of UK Total | No. | % of UK Total | No. | % of UK Total | No. | % of UK Total |
| **1998** | 2,700 | 1.3% | 3,100 | 5.9% | 2,700 | 2.7% | 8,500 | 2.4% |
| **1999** | 2,600 | 1.3% | 2,000 | 3.9% | 9,800 | 10.6% | 14,400 | 4.2% |
| **2000** | 3,800 | 1.8% | 2,400 | 4.1% | 8,400 | 7.7% | 14,600 | 3.9% |
| **2001** | 3,300 | 1.5% | 2,900 | 4.5% | 7,600 | 7.3% | 13,800 | 3.5% |
| **2002** | 3,300 | 1.5% | 2,900 | 4.9% | 7,100 | 6.5% | 13,300 | 3.5% |

**Table 4: Number of Employees[20]**

## 4.3 The moving image sector in Edinburgh (and Lothian)

The three main centres of content production for the audiovisual industries in Scotland are Dundee (specialising in computer games), Edinburgh and Glasgow. Glasgow is by far the largest of the three and is also the main television production location. Three of the four UK public service broadcasters have offices in Glasgow – BBC Scotland, Scottish Television (part SMG)) and Channel 4's Nations & Regions base. BBC Scotland intends to move from its existing offices in the West End of Glasgow to the new Pacific Quay development on the south side of the Clyde during 2007, while SMG moved there during 2006.

Table 5 (based on the number of production companies) and Table 6 (based on estimated content spend) indicate Glasgow's dominance of most areas of content generation for the Scottish Moving Image sector across most of the industries, particularly television.

| No. Production Co's Operating in Scotland (2001) | Edinburgh | Glasgow | Rest of Scotland | Total Scotland | No. of Co's in Edinburgh as % Total Scotland |
|---|---|---|---|---|---|
| **Television** | 4 | 17 | 3 | 24 | 17% |
| • Network | 8 | 22 | 4 | 34 | 24% |
| • 'Regional' | 2 | 5 | 7 | 14 | 14% |
| • Gaelic | 1 | 8 | 1 | 10 | 10% |

[20] DCMS, *Creative Industries Economic Estimates Statistical Bulletin,* October 2005

| | | | | | |
|---|---|---|---|---|---|
| • Multichannel<br>**Total** | 16 | 39 | 16 | 71 | 23% |
| **Feature Film** | 11 | 23 | 2 | 36 | 31% |
| **Animation (excl. Games)** | 2 | 9 | 2 | 13 | 15% |
| **Radio (No. of Stations)** | 2 | 4 | 27 | 33 | 6% |
| **Interactive Screen** | 5 | 10 | 3 | 18 | 28% |
| **Corporate Video** | 8 | 14 | 24 | 46 | 17% |
| **TV & Radio Commercials** | 3 | 2 | 0 | 5 | 60% |
| **TOTAL (estimate)** | NA | NA | NA | NA | 20% |
| **Facilities Co's** | 61 | 147 | 60 | 268 | 23% |

**Table 5: Location of production companies operating in Scotland - 2001**[21]

However, taking a broader view of the Moving Image sector, i.e. one which includes the pre- and post-production and distribution as well as the production parts of the value chain, and using employment as a measure, a very different picture emerges (see Tables 7A and 7B below). On this basis, Lothian emerges as the leading Scottish region in terms of employment in the Moving Image sector, accounting for some 36% of the Scottish total. Lothian is also the leading region in terms of Radio and Television related employment, accounting for 38% of the Scottish total compared with Strathclyde's 29%.

[21] PACT Scotland, *Audit of the Screen Industries in Scotland, Ibid*

| Estimated Content spend through Scottish Companies (% of Total Scotland) | Edinburgh | Glasgow | Rest of Scotland | Scotland as % of Total UK |
|---|---|---|---|---|
| **Television** | | | | |
| • Network | 3.6% | 96.2% | 0.2% | |
| • 'Regional' | 1.0% | 88.5% | 10.5% | |
| • Gaelic | NA | NA | NA | |
| • Multichannel | NA | NA | NA | |
| **Total** | NA | NA | NA | 5% |
| **Feature Film** | | | | |
| • Local spend | 0% | 33% | 67% | |
| • Other | NA | NA | NA | |
| **Total** | NA | NA | NA | 14% |
| **Animation (excl. Games)** | 9% | 85% | 6% | 3% |
| **Interactive Screen** | 4% | 68% | 28% | 2% |
| **Corporate Video** | Mainly outside main urban areas | Mainly outside main urban areas | Mainly outside main urban areas | 5% |
| **TV & Radio Commercials** | 34% | 66% | 0% | 2% |
| **TOTAL** | NA | NA | NA | 5% |

**Table 6: Estimated content spend through Scottish companies by location - 2001**[22]

[22] PACT Scotland, *Audit of the Screen Industries in Scotland, Ibid*

**Employment Level**

| Employment in Screen Industries (incl. Radio) | Motion Picture Production | Motion Picture and Video Production | Motion Picture Projection | Radio and TV Activities | Reproduction of Video Recording | Reproduction of Computer Media | Screen Industries |
|---|---|---|---|---|---|---|---|
| **Borders** | 27 | 2 | 27 | 8 | 0 | 87 | 151 |
| **Central** | 8 | 0 | 93 | 16 | 0 | 0 | 117 |
| **Dumfries & Galloway** | 6 | 6 | 36 | 45 | 0 | 0 | 93 |
| **Fife** | 26 | 4 | 73 | 1869 | 0 | 2 | 1974 |
| **Grampian** | 151 | 7 | 139 | 255 | 1 | 0 | 553 |
| **Highland** | 22 | 3 | 57 | 93 | 0 | 0 | 175 |
| **Lothian** | 164 | 42 | 322 | 2661 | 10 | 373 | 3572 |
| **Strathclyde** | 309 | 30 | 754 | 2028 | 15 | 48 | 3184 |
| **Tayside** | 15 | 2 | 94 | 66 | 0 | 0 | 177 |
| **Western Isles** | 0 | 0 | 0 | 7 | 0 | 0 | 7 |
| **Scotland** | 728 | 96 | 1595 | 7048 | 26 | 510 | 10003 |

**Table 7: Employment in Scotland by Scottish Region and Sector – 2002**

| Employment in Screen Industries (incl. Radio) | Motion Picture Production | Motion Picture and Video Production | Motion Picture Projection | Radio and TV Activities | Reproduction of Video Recording | Reproduction of Computer Media | Screen Industries |
|---|---|---|---|---|---|---|---|
| **Borders** | 3.7 | 2.1 | 1.7 | 0.1 | 0.0 | 17.1 | 1.5 |
| **Central** | 1.1 | 0.0 | 5.8 | 0.2 | 0.0 | 0.0 | 1.2 |
| **Dumfries & Galloway** | 0.8 | 6.2 | 2.3 | 0.6 | 0.0 | 0.0 | 0.9 |
| **Fife** | 3.6 | 4.2 | 4.6 | 26.5 | 0.0 | 0.4 | 19.7 |
| **Grampian** | 20.7 | 7.3 | 8.7 | 3.6 | 3.8 | 0.0 | 5.5 |
| **Highland** | 3.0 | 3.1 | 3.6 | 1.3 | 0.0 | 0.0 | 1.7 |
| **Lothian** | 22.5 | 43.7 | 20.2 | 37.8 | 38.5 | 73.1 | 35.7 |
| **Strathclyde** | 42.4 | 31.2 | 47.3 | 28.8 | 57.7 | 9.4 | 31.8 |
| **Tayside** | 2.1 | 2.1 | 5.9 | 0.9 | 0.0 | 0.0 | 1.8 |
| **Western Isles** | 0.0 | 0.0 | 0.0 | 0.1 | 0.0 | 0.0 | 0.1 |
| **Scotland** | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |

**Table 8: Percentage of Employees by Scottish Region for each Sector – 2002**

The comments of the 2003 Screen Industries audit on Scotland's advertising agency sector are also of interest[23]:

"Although local commercial productions may be limited, Scotland has a buoyant advertising agency sector, which might help attract some national campaigns (both from Scottish and non Scottish companies) to be managed in the region. This, in turn, could bring in national commercial productions"

As we shall explore further in later sections, advertising is one of the key moving image related industries in Edinburgh – the city has a strong tradition in advertising and opportunities to build from this in the future.

[23] Pact in Scotland et al, 2003, *Audit of the Screen Industries in Scotland: A Report for the Scottish Executive, Pact in Scotland, Scottish Enterprise, Highlands and Islands Enterprise and Scottish Screen*, p.187.

## 4.4 Skills

The perceived glamour, vibrancy and associated status connected with the Moving Image sector are such that there is always over-supply of interested and willing workers. Generally speaking the level of education amongst such new entrants is high, especially the proportion of graduates. Having said this, there are still outstanding issues relating to the supply of appropriate skills for industry needs.

In its Sector Skills Agreement for Scotland[24], Skillset deals with the skills issues on a Scotland-wide basis for three categories relevant to moving image – TV, Film and Interactive Media. For TV production, the document identifies the following skills issues:

- Continued demand and requirement for up-skilling in craft and technical occupations
- Specific need to raise standards in Business and Creative Strategy including innovation, deal structuring, Intellectual Property Rights (IPR), cross-media ownership, scheduling skills for multi-platform content
- Awareness that high proportions of the workforce in Scotland are made up of freelancers that do not have access to training and CPD opportunities
- Concern that HE programmes do not prepare graduates for work or meet industry needs
- Need for media literacy in schools and informal learning environments

The report recognises progress such as:

- the SQA review of the HN qualifications in radio and TV that led to reviewed programmes from 2005/6 along with an identification of CPD needs for lecturing staff
- The Freelance Training Fund – funded by the BBC, ITV, Channel 4 and independent producers to a tune of £1 million per year
- The provision of CPD at Scottish Screen and through the Research Centre for TV and Interactivity (both Glasgow-based)

And proposes a total of 16 key interventions for joint investment between the TV industry and public sector partners. Of these 16, the following are of particular interest to Edinburgh:

- *In partnership with HE in Scotland, recognition of graduate and post-graduate media courses building on existing industry-led models in broadcast journalism, animation and screen-writing* – There is potentially an opportunity for the city's universities to raise their game through working with Skillset and the industry to improve
- *Recognition of a small number of FE and HE institutions as Skillset Screen Academies* – Edinburgh has already benefited from the appointment of Screen Academy Status to Edinburgh College of Art and Napier University
- Appropriate post-graduate provision to support the development of senior leaders and creative entrepreneurs in the television industry – *Again, potentially a role that*

[24] Skillset, *Sector Skills Agreement (Scotland) TV, Film, Interactive Media and Radio,* Skillset, 2005

*could be met by one or more of Edinburgh's HE institutions, preferably a consortium of partners that could each add their own specialism*

- Ensure participation from Scotland in a management and leadership plan
- Targeted sectoral approach to provision for business start-up and growth, entrepreneurship and company support for skills development (particularly for SMEs*) – through the education sector, Scottish Enterprise Edinburgh and Lothian, Careers services and with industry players*
- Supporting the development of openly recruited and more structured routes into employment and skills development – *developing frameworks through community education, FE, HE and CPD*
- Seek accreditation for flexible, fit for purpose qualifications which will be eligible for public support – *encouraging training providers in the city to gain accreditation*
- An industry-specific Career Information, Advice and Guidance service which informs and supports all other career services throughout Scotland – *put forward a proposal for this to be based in Edinburgh*
- Working with partners to develop action plans that support the development of key clusters and individuals – the Edinburgh Moving Image strategy itself should have the development of key clusters and individuals as one of its core aims

Turning to film, the issues are slightly different. Skillset have identified gaps in provision within the FE sector as well as insufficient links of the FE institutions with the film industry.

Within HE, there is a vast range of provision, but concern that expectations from both students and the industry have not been met. There has been widespread confusion surrounding the number and quality of film-related courses that do not necessarily lead to either industrially-relevant skills, qualifications or indeed employment.

The establishment of the Screen Academy network, including the one at Edinburgh College of Art and Napier University has been the most prominent action addressing this gap – the Screen Academy status bringing with it both industry involvement and a validation of its accreditation in terms of being an industry-level training route.

The film industry has actually been relatively responsible in providing financial support for CDP of its freelancers. There has been a voluntary levy on feature film production for the support of freelancers that has raised over £3 million since its inception in 1999. Scottish Screen's long-running New Entrants Scheme, aimed at fledgling film-makers, is also widely regarded as an invaluable contributor to skills development for the film industry.

While there is only limited demand for commercial film-making skills in Scotland – and needless to say with supply out-stripping demand – it is important that those involved in education and skills development help new entrants to prepare themselves with transferable skills. It is unrealistic for significant numbers to make full-time livings out of film-making – they may however be able to supplement film-making activities with related activities such as screen writing for TV, development of games scripts, commercials work or other moving image activities.

Skillset's Sector Skills Agreement for Scotland highlights 13 key interventions for the film industry in the UK and in Scotland. For Edinburgh, the following are of particular relevance:

- Industry recognition of HE courses in Scottish Institutions with recognised capabilities in identified priority areas – *further recognition for Edinburgh College of Art, Napier University and Queen Margaret University College*
- Introduce apprenticeship programmes in targeted occupational areas, which are fit for purpose and linked to appropriate vocational qualifications
- Develop and seek accreditation of flexible, fit for purpose qualifications which will be eligible for public investment support – *through the FE colleges, community organisations or through on-the-job training*
- Provision of grants and bursaries (to individuals or training providers) to increase access to high quality, industry-relevant CPD, with a particular emphasis on the specific needs of freelancers and small companies – *Edinburgh could take advantage of this provision in developing a leading centre for moving image-related CPD*

Turning to Interactive Media, the gaps in skills provision fall into three main categories:

- Creative – the ability to apply the creativity of scripting and narrative development and games progression for the development of games and interactive content
- Technical – high level technical specification skills are required with additional skills in web design and development, rich media integration and with e-commerce and back-end integration
- Managerial – including presentation and pitching, Intellectual property rights, product development, market entry strategies, deal brokering, outsourcing and dealing with partnerships

Skillset has identified a requirement for post entry training within the interactive media sector - bringing graduates who tend to have some creative and technical skills up to the required level to make a real contribution to the commercial environment.

Within this sector, 38% access CPD training on an ad hoc basis and around 12% offering training on a monthly basis. Most of the training for this sector is provided by the commercial sector – especially modules focused on particular software modules or technology platforms and to some extent management training.

The gaps in CPD provision are mainly within the creative and managerial groups – mainly generic skills but tailored for the new markets and business models applicable to interactive media companies. Most of the companies in the interactive media sector are small or micro-businesses. They rely heavily on partner relationships rather than traditional supply relationships, their business models are often based around the exploitation of intellectual property rather than the sale of products or services in the traditional sense and their work-forces consist extensively of freelancers and contract workers rather than in-house staff. All these factors lead to specific requirements for managerial skills development.

Skillset's Sector Skills Agreement highlights twelve key interventions, of which five have strong relevance for the moving image sector in Edinburgh:

- Working with FE and SQA to develop conversion courses aimed at supporting professionals transferring into interactive media from other industries and sub sectors – *this would be a useful approach to extend the abilities of some of Edinburgh's film makers to work in other sub sectors during down time*
- Developing a UK-wide accreditation scheme for computer games which will promote flexible, modular and industry-focused programmes. This accreditation scheme will be supported by benefits from the industry such as work placements, mentors, speakers – *Skillset has stated its desire for Scotland to be among the early adopters of these programmes and within Scotland, Edinburgh has an opportunity to make a first move*
- Develop an industry-specific business and management skills programme, linking to current initiatives on management and leadership available through the enterprise network but providing industry context and expertise - *within Edinburgh this programme would link in with the activities of the Cultural Enterprise Office and of Business Gateway*
- Working with Scottish Screen and other public partners as required to develop action plans that support the development of key clusters and individuals – *pertinent to the development of Edinburgh's Moving Image Strategy and to future developments arising from the strategy's recommendations*
- Provision of grants and bursaries to individuals to increase access to high quality relevant training and development opportunities with a particular emphasis on freelancers and small companies – *relevant agencies within Edinburgh should raise awareness of grants and encourage take-up of training opportunities amongst the relevant companies*

# 5 INDUSTRY, EDUCATION AND SUPPORT INFRASTRUCTURE

## *5.1* Introduction

The digital era has reached a stage where convergence is at last becoming evident
and where it is more useful to approach the industry from the basis of one common value chain rather than attempting to consider sub-sectors such as film, TV, interactive, games, mobile content and e-learning as having separate value chains.

**Figure 2: Generic value chain for the moving image industries – nmp, 2006**

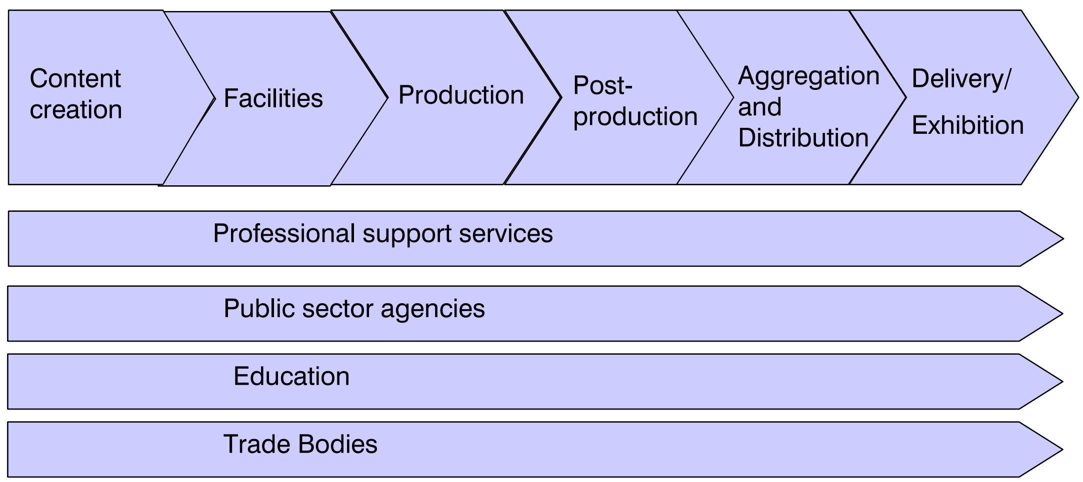


Figure 2 shows the generic value chain for digital media industries. The value chain consists of a number of vertical links that make up the process from idea generation and creation of content elements, through production, finishing and aggregation of products to distribution and delivery.

Additionally the value chain also contains a number of horizontal elements that support and accompany the main activities. These include professional support services, business support, finance, education and skills support.

**Content Creation** refers to the actual content elements that make up a TV production, film, new media, advertisement or publishable product. The key players within content creation include scriptwriters, archive libraries, animation houses, software houses and artists.

**Facilities** includes a wide variety of businesses supplying services to the production – from equipment hire, specialist supply of catering, props, sets, agencies supplying actors and animals and so on.

**Production** includes the following sub-categories of businesses:

- Film production companies
- Film studios
- TV production companies
- Commercial production houses
- New media production companies

**Post-production** includes the following types of companies:

- Editing houses
- Post-production houses

**Aggregation** is an important element within the value chain and an element that is currently being contested by a lot of different types of companies. In TV circles, the broadcasters have typically fulfilled the aggregation role in-house but the move to a greater level of programme sourcing from independent production companies has changed the situation and new players are seeing the value to be gained in this space. Companies, such as RDF and All3Media, from within production are moving up the value chain into this space – aggregating the properties of other production companies alongside their own – joining the more established distribution businesses that already perform the aggregation role. BSkyB is currently the dominant aggregator of content for digital TV.

Within new media sub-sectors, the aggregation role has been fiercely fought. For example, within the mobile content business mobile network operators (Vodafone, Orange, O2, T-Mobile and Three), handset vendors (particularly Nokia), independent content aggregators (JAMSTER, Fun2Mobile) and portals (Yahoo! and MSN) have all been vying for the role to assemble the best range of content. In fact, what has happened latterly is that mobile portals and application service providers (ASPs) that tried to provide service straight to the end user in the early 2000s have now changed their models and are providing 'white label' services for mobile network operators and service providers.

As technological advances continue to push the content industries towards convergence; we are likely to see this aggregation role grow in importance. Consolidation across the sub-sectors is due so that in the next few years we will see 'super aggregators' emerge that have the ability to assemble multi-format content for next generation technology delivery platforms.

**Distribution** refers to the distribution of content properties to the UK and other networks and the physical distribution of products such as DVDs, games and published items.

Physical distribution is increasingly merging with delivery – i.e. electronic delivery of content via broadcast or other networks – and aggregators will find new channels for distributing digital content that does not require logistics.

**Delivery** is the element of the value chain which is witnessing the greatest convergence to date. Increasingly content is becoming delivery-platform agnostic: the same types of content can be accessed using a variety of different devices and across different networks.

The most developed example of convergence is for digital radio content, where cable TV, satellite TV, DAB radio and Internet technologies may all be used to access the same set of basic services.

As technological convergence takes place, so we expect to see a convergence in the associated industries and their business models too. So, where delivery has been the territory of the main broadcasters or studios we now see alternative businesses such as telecoms operators, portals and Internet service providers (ISPs) moving into this space. For example, recent developments have seen the emergence of Orange TV, Microsoft TV, Ericsson iTV and other non traditional "broadcasters" such as Vodafone declare an interest in becoming the multi-platform content distributors of the future.

**Exhibition** has in the past primarily referred to the cinematic screening of film properties within commercial cinemas. However, increasingly there are opportunities for exhibition to take place in non-conventional settings. This is supported by the emergence of new platforms – so that, for example, moving image content can be viewed on an increasing range of portable devices (mobile phones, games consoles and others) and temporary exhibition spaces can be established in public open spaces, galleries, entertainment venues, pubs and restaurants or other.

The range of available technologies is increasing. But at the same time the content is being produced in a form where it is increasingly platform agnostic: the same content properties can be enjoyed on a choice of screening technologies be they big screen, personal devices, TV or other.

The availability of technology has led to an increase in the use of moving image within the repertoires of visual artists as well as within filmmaking and broadcast media.

## 5.2 The Company Base

### *5.2.1 Evidence of Edinburgh companies along the value chain*

The mapping of the company base has identified a total of **212** moving image sector businesses operating in Edinburgh. These are available for viewing in Appendix 1.

Figure 3 provides a breakdown of these companies according to their position in the moving image value chain. Mapping provides strong evidence that there is a significant moving image cluster in Edinburgh – with strong contingents of production, facilities and advertising. However, another initial observation should be that there is currently a gap amongst whole sections of the value chain – there is no significant presence in the city amongst aggregation, distribution and delivery elements of the chain. This in effect means that while production is present, supported by a range of facilities, there are no significant "media buyers" on a local level and Edinburgh's production sector needs to look outside to attract finance and to conduct its main business deals.

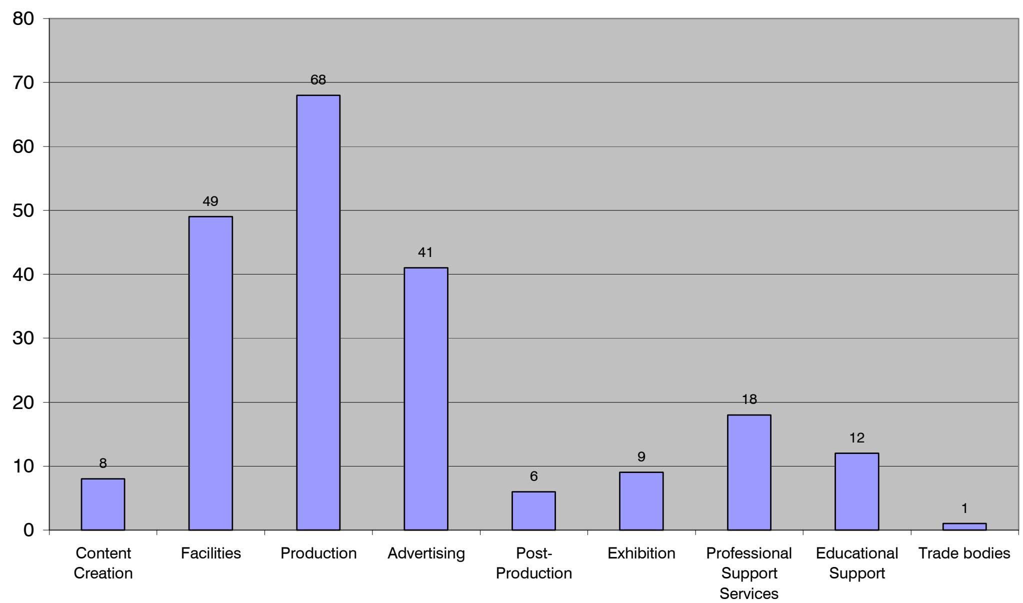


**Figure 3: Overview of the moving image company base in Edinburgh - nmp, 2006**

### *5.2.2 Evidence of Clustering*

Figure 4 shows the geographic clustering of moving image companies in Edinburgh by postcode. There is a striking concentration of relevant companies in Leith (EH6) – stretching also to Inverleith (EH3) to the South-West, Granton and Pilton (EH5) to the West and Lochend (EH7) to the East. There is also a collection of relevant companies in Edinburgh city centre (EH1 and EH2).

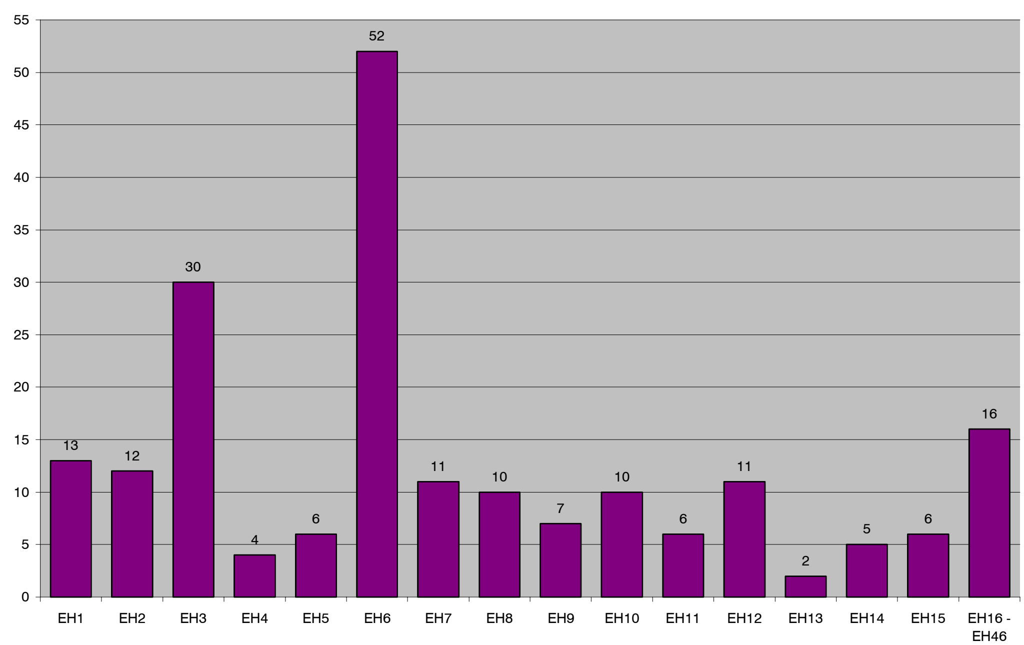


Figure 4 - Edinburgh's Moving Image Companies by Postcode

**Table 9: Edinburgh Postcodes and Associated Areas**

| Postcode | Edinburgh Area |
|---|---|
| EH1 | Old Town |
| EH2 | New Town |
| EH3 | Inverleith; The Meadows |
| EH4 | Blackhall; Cramond; Stockbridge |
| EH5 | Granton; Trinity |
| EH6 | Leith |
| EH7 | Lochend |
| EH8 | Holyrood Park; Duddingston |
| EH9 | Morningside |
| EH10 | Braid Hills |
| EH11 | Haymarket |
| EH12 | Sighthill; Corstorphine; Murrayfield |
| EH13 | Colinton |
| EH15 | Musselburgh; Joppa |
| EH16 | Liberton; Craigmillar; Prestonfield |

### *5.2.3 Creation*

In most cases Creation is the preserve of individual artists, musicians, authors and screen writers, so while this category occupies a very important portion of the value chain in terms of process it does not appear as such with respect to companies. In this mapping, the companies that have been categorised within the content creation section are involved in either graphics creation or music. However, there are also a large number of freelancers and employees within the production and advertising categories that are involved in content creation activities.

### *5.2.4 Production*

Our mapping research identified 68 production companies operating in Edinburgh (at April 2006). Most of the production companies in the city are small – although estimating the total employed is difficult due to the flexibility of the companies. While even the most successful production companies run on very small staff numbers, during production the numbers involved in the businesses can vastly increase.

It is true to say that Edinburgh does not have the same volume of professional and commercial production as Glasgow. Nevertheless, Edinburgh is home to a surprising number of production companies and freelance personnel. During the research for this strategy we came across several individuals that choose to base themselves in Edinburgh (for personal or life-style reasons) but that work in the moving image sector in Glasgow.

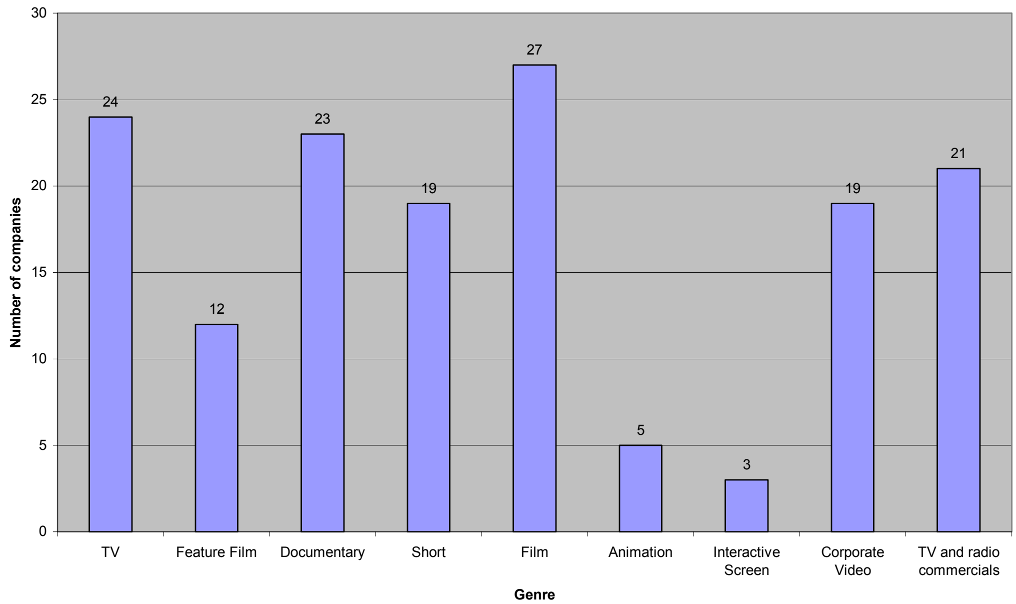


**Figure 5 - Specialisms of Edinburgh Production Companies**

Looking at a selection of 46 Edinburgh-based production companies for which information was available, we can see the specialisms of Film (which is also broken down in the chart as “Feature Film” and “Short”), Documentary and TV as the most popular forms of production. However, from the 27 companies that specialised in film, only one did not indicate another interest (usually TV). This is provided in Appendix 2.

While the production sector in Edinburgh is relatively small, it includes a number of high profile and highly successful individuals. Several of Edinburgh’s best known producers have moved back to the city for life-style reasons, having established careers in London or internationally. This means that within the production sector there are strong international links that can be exploited to bring further benefit within the city.

Many Edinburgh based producers choose to locate in the city, but actually do most of their business and their work outside. The disadvantage of this is that it means that the city does not gain the benefit of their presence along the value chain (or achieve the multiplier effect into the economy). The city’s moving image sector may at some future point grow to an extent where it can support a more extensive moving image sector infrastructure. In the meantime, Edinburgh should take advantage of its prominent moving image sector ambassadors to gain publicity for the city, to feed into its education, cluster development and mentoring programmes and thereby to help create a virtuous circle in which the sector can gain a critical mass in its own right.

Until recently, the main provision for production companies in Edinburgh to meet together and network was through Creative Edinburgh. Then following up an idea that was first discussed in Cannes in 2004, a group of Moving Image producers established the idea of a producers’ network, which Edinburgh Film Focus was able to facilitate. The producers’ network now meets regularly on the first Tuesday of each month. This is still currently organised by Edinburgh Film Focus. At the time of writing the strategy, there were already 37 individuals registered with the network, with average attendance at the meetings around 20 people.

"The First Tuesday Group is indicative of a shift in emphasis - there is recognition now that there is a vacuum which needs to be filled and that this is a very interesting time for the sector" – An Edinburgh based production company

The producers network is an opportunity for the sector to support itself – for gains to be made in peer support, collaborative working and partnerships.

### *5.2.5 Advertising*

"Edinburgh's position as a centre of excellence for advertising means it is an important creative centre for the Moving Image sector in Edinburgh and Scotland as a whole" – Managing Director of one of Scotland's Leading Advertising Agencies

Edinburgh has a strong tradition of advertising – a total of **41** advertising agencies in the city. The Leith Agency, Edinburgh's largest advertising agency sits alongside medium-sized companies such as The Union and Newhaven Agency and a whole host of smaller agencies and freelancers.

Advertising companies are clustered from Edinburgh's New Town (Dundas Street) and through to Leith.

For 2006, Edinburgh agencies hold positions one to three in the prestigious "Roses" awards nominations for non-London based advertising agencies. Moreover, The Union has 12 nominations with Newhaven and The Leith Agency having eight nominations each.

The Leith Agency reported a turnover of £15.3 million for the year ending December 2004, with net income of £0.6 million. The company is undergoing a period of growth – with an increase in sales of 67% compared with the previous year. At the end of 2004, the company had 50 employees.

The Advertising industry is currently under-going a major period of change:

- Pressure on budgets due to fall in audiences for TV channels, and especially for advertising breaks, combined with an expansion in the numbers of channels
- Consolidation in supplier contracts – so that blue chips favour fewer large contracts to retaining a number of smaller agencies
- Loss of confidence in traditional advertising but an associated growth in innovative advertising approaches – using online platforms, viral marketing techniques, product placement and sponsored production

The Scottish Advertising industry has been faced with the additional disadvantage of a predominantly Scottish-based clientele. While Scottish-based companies are willing to go to London to source advertising agencies, Scottish-based advertising agencies have a tough challenge in attracting work from outside Scotland. However, the more secure and forward-thinking agencies are looking outside of Scotland for work.

Almost 80% of the marketing spend of Scotland's top 30 organisations is estimated to be spent by just seven companies (Royal Bank of Scotland, Halifax Bank of Scotland, Scottish Courage, Standard Life, Scottish Widows, the Famous Grouse and Aberdeen Asset Management). These companies spend almost all of their budgets in London. The remaining 23 organisations loyally source their advertising from Scottish agencies – the majority of which goes to Edinburgh agencies.

In recent times Scottish advertising has suffered. The loss of lucrative accounts with Royal Bank of Scotland and Kwik Fit are quoted as being primary causes for the demise (and liquidation) of Faulds, which was previously Scotland's leading agency (with around £20 million turnover) and other agencies have been hit too.

Standard Life has pulled its budget out of its home city and has appointed Saatchi and Saatchi to handle a centralised group account rather than awarding the contract to The Leith Agency. The Leith Agency also lost a key account for Coor's Carling label, reportedly worth £7 million, to London-based agency Beattie McGuinness Bungay in early 2006.

However, there are new opportunities arising for advertisers that are willing to travel to find new business and that are willing to embrace new platforms and business models. Moreover, there are local technological innovations that can be combined with the advertising and creative talents to form an advertising industry that is fully prepared for the future.

Some of the technological developments in pervasive computing, in search strategies, in display hardware and human computer interfaces can have very relevant implementations for the advertising industry – particularly if these links between the creative and the technical are followed-up. The existing skills and understanding are present on each side – forming groups of interest and making the investments is the next stage.

"The future of advertising is the Internet" – Bill Gates[25]

While Bill Gates' vision is realistic to some extent, the Internet of the future is not going to be simply about Websites. The advent of interactive media portals such as Sky Active, the portal that is about to be announced from the re-branded ITV and even to BBC Online also present mass market entry points to the Internet and to advertising opportunities – that can catch many of those consumers that do not have PCs.

One of a new set of companies that are taking advantage of the opportunities from digital platforms for advertising and marketing is Edinburgh-based agency, Dowcarter. Dowcarter has enjoyed a period of sustained growth in its operations and sales with reported sales of

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[25] Bill Gates addressing IAB Engage 2005 Conference, London, October 2005

£2.9 million for the year ending January 2005, which represented a growth of almost 19% on the previous year. Dowcarter employs around 46 employees in its London and Edinburgh offices and specialises in digital and online campaigns. The company boasts an impressive blue-chip client list that includes Scottish Power, Siemens, Conran, Tesco Personal Finance and William Grant (Glenfiddich).

As with other areas of media production, Scottish advertising agencies report difficulties in attracting experienced creative talent. Companies like, The Union, tend to recruit around 80% of appointments locally, with just a few senior positions being filled from London. Scottish universities provide a good range of graduate-level employees.

### *5.2.6 Post-Production*

There are some post-production facilities available in Edinburgh at Freakworks, Crystal Media and Arc Facilities. To some extent post production facilities are being superseded by software based systems for post production that can be acquired relatively cheaply and managed in-house. For more sophisticated requirements, post production is generally provided in Glasgow or London.

### *5.2.7 Facilities*

**Studios**

There have been suggestions that Edinburgh should look to set up studios for film or TV. However, this is not an option that looks like making financial sense at this stage given the increasing prominence of Central and Eastern European studios for feature films and an over-supply of TV studios in the UK.

In the UK, the film and studio provision in the 'independent sector' (i.e. outside the BBC) is rapidly heading towards a monopoly situation. Following the merger and public flotation of Pinewood and Shepperton Studios, the company has now acquired the old Thames TV studios at Teddington. The 'Producer's choice' within the market is rapidly shrinking especially for the larger projects. In and around London, the smaller outfits of Ealing, Elstree, Twickenham and Bray will continue to survive on the smaller productions and TV commercials.

In September 2005, Pinewood Shepperton announced that it was cancelling the proposed improvements of their studios, blaming a drop in American productions as a result of the strong pound driving out production mainly to Eastern Europe. A shareholders' dividend probably also being postponed pending the Chancellor's announcements with respect to the operation of the new incentives for increased investment in British Films.

Feature films in particular, are now very much a global product. Studios are now - more than ever - just the companies that make the movies – they are not confined to any particular sets of fixed buildings.

Edinburgh used to have a number of studio facilities – Scottish Television (STV) owned and ran The Gateway Studios on Leith Walk, which are now owned by Queen Margaret University

College intended for use as a training facility (QMUC bought the studios from STV in 1994). In addition there were a number of privately-run studios, including Picardy studios at Picardy Place in Edinburgh.

"[When the studios at Picardy closed] the 'hubs' disappeared overnight. If there was studio space, people would think about making a broader range of programmes" – Independent Production Company

However, the studios that have tried to run in the city have found it difficult to run at a profit. Currently there are some small film studio provisions in the Edinburgh area:

**Edinburgh Film Studios, Nine Mile Burn**

Operates a 1450 square foot dry hire studio. It is suitable for TV, music videos, corporate, small scale drama, children's TV, animation and photography. The studios have changed ownership in recent years and the current owners are planning to upgrade the studios in summer 2006. Following upgrade, the studios will have a permanent blue or green-screen set up. These studios have the advantage of being well sound-proofed. In addition to the dry hire business, studio owner, Donald Mitchell also provides re-touching, image creation, editing and post-production services.

**The Lighthouse Studios, Granton**

The Lighthouse Studios offers:

- Two spaces measuring 15 by 18 metres
- A hangar space measuring 30 metres by 10 metres, with a ceiling height of 16 metres
- Production offices and production suite
- Chroma-screen (green-screen)

Both the Edinburgh Film Studios and Lighthouse Studios offer cost-effective studio space.

**Freakworks**

Based at the Shore in Leith, Freakworks provides studio space for film or TV as well as post-production facilities and editing.

**Redroof Studios**

Another studio based in Leith, providing 1600 square feet of studio space plus production offices. This space is used primarily by advertising agencies and photographers.

**Harbour Point**

This is a dry hire provision in Musselburgh. The premises were intended as office accommodation but are currently standing empty and have been used for TV and film studio space.

**Whitehouse Studios**

Whitehouse Studios in Bilston specialises in commercial and advertising photography and productions. The studio is also available for hire by either the day or half day and the company has aerial facilities too.

**Other Facilities**

A wide range of facilities are provided in Edinburgh itself. For some specialist or larger scale facilities then Glasgow will be the nearest source, but general facilities including lighting, camera, costume and transportation are all available locally. Edinburgh Film Focus maintains a database of facilities.

Hammerhead TV and Sound and Vision are leading providers of facilities hire in Edinburgh. Sound and Vision reported a turnover of £1.7 million for 2004. The Warehouse, sound facility is another leading provider of facilities.

### *5.2.8 Aggregation/distribution/delivery*

There are currently no major companies in the aggregation, distribution or delivery spaces working from Edinburgh or with a buying office in Edinburgh. The main base for broadcasters is Glasgow – the BBC, STV and Channel 4 all have bases in Glasgow and the BBC has reduced its presence in Edinburgh.

There is little chance that one of the main terrestrial broadcasters will re-locate to Edinburgh in the near future. The BBC is part way through constructing its new Scottish HQ at Pacific Quay and STV is in preparation for the move to its new Pacific Quay site. Channel 4 has a small (but vocal) presence in Glasgow but looks unlikely to move through to Edinburgh.

There may, however, be opportunities to attract one of the new platform buyers to locate in the city – Appendix 3 provides some examples of companies that are positioned as new platform providers or operating between technology and content. This may be one of the secondary TV market buyers – the satellite or cable channels. Or it might be from the new platform buyers that are moving into the premium content distribution market (see above). If Edinburgh can establish itself as a major player in terms of both content creativity and technological innovation, then it has a strong opportunity to attract technology-savvy aggregators and distributors whose business models rely on getting both of these aspects right.

The importance of having a major broadcaster within a media-related cluster is well documented. But, in the absence of this, the onus is on the moving image sector in the city to either travel to the broadcasters, or to find ways to attract the broadcasters to come to Edinburgh. This could be through the EIFF, or an adjunct to the EIFF that would have a strategic focus on bring major buyers to the city.

Amateur and community initiatives such as DocSpace, that support the distribution of moving image content can be beneficial. There are potentially opportunities for Edinburgh's moving image stakeholders to form distribution platforms for other types of content – particularly taking advantage of new platforms.

### *5.2.9 Exhibition*

Edinburgh is well served for exhibition – with a range of provision from mass market and broad appeal through to exhibition of amateur, student and community productions.

The city is unusually well served within the niche and specialist section and also has an increasing provision of art house and specialist genres at the multiplexes.

| FILM | Amateur, student and Community | Education, outreach and social | Graduate and emergent | Niche and specialist | Broad Appeal | Mass Market | Screens | Seats |
|---|---|---|---|---|---|---|---|---|
| Cameo | | | | √ | | | 3 | 394 |
| Cineworld | | | | √ | √ | √ | 13 | 3015 |
| Dominion Cinema | | | | | √ | | 4 | 661 |
| Odeon Fort Kinnaird | | | | | √ | √ | 12 | 2476 |
| Odeon Lothian Road | | | | | √ | √ | 4 | 700 |
| Odeon Wester Hailes | | | | | √ | √ | 8 | 2128 |
| The Filmhouse | √ | √ | √ | √ | √ | | 3 | 454 |
| Vue Ocean Terminal | | | | | √ | √ | 12 | 2744 |
| Vue Omni Centre | | | | | √ | √ | 12 | 2100 |
| TOTAL | | | | | | | 71 | 14672 |

**Table 10: Summary of main film exhibition venues in Edinburgh**

Our primary research identified exhibition as a key strength for Edinburgh's moving image sector. The city boasts a total of 71 screens and 14,672 seats across its nine venues.

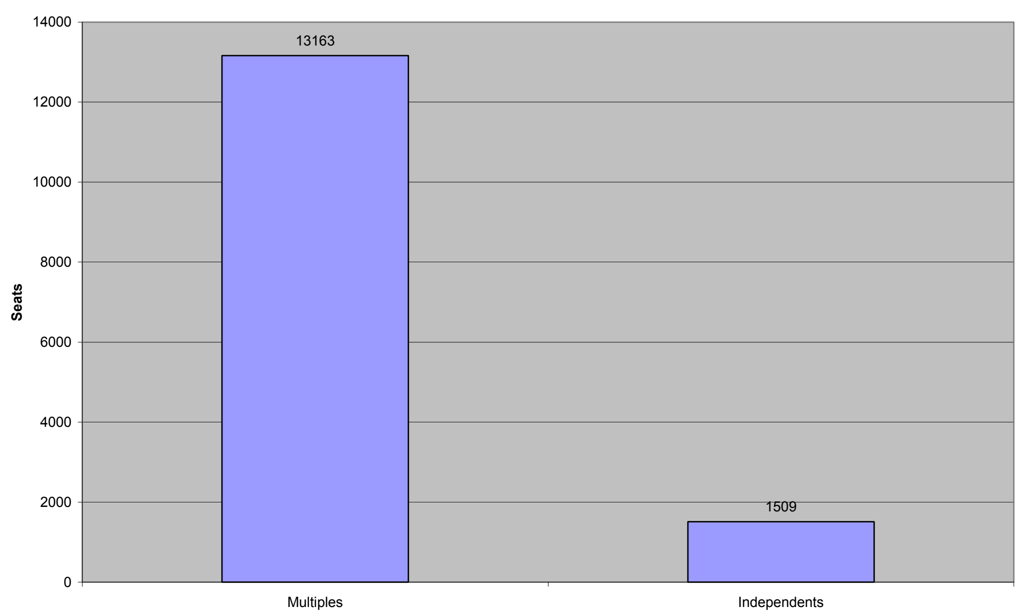

**Figure 6: Cinema Screens in Edinburgh**

The multiple cinema chains dominated – with Odeon, Vue and Cineworld operating over 13,000 – a figure that represented almost 90% of the total cinema seats. Odeon alone operated over 5300 seats in the city.

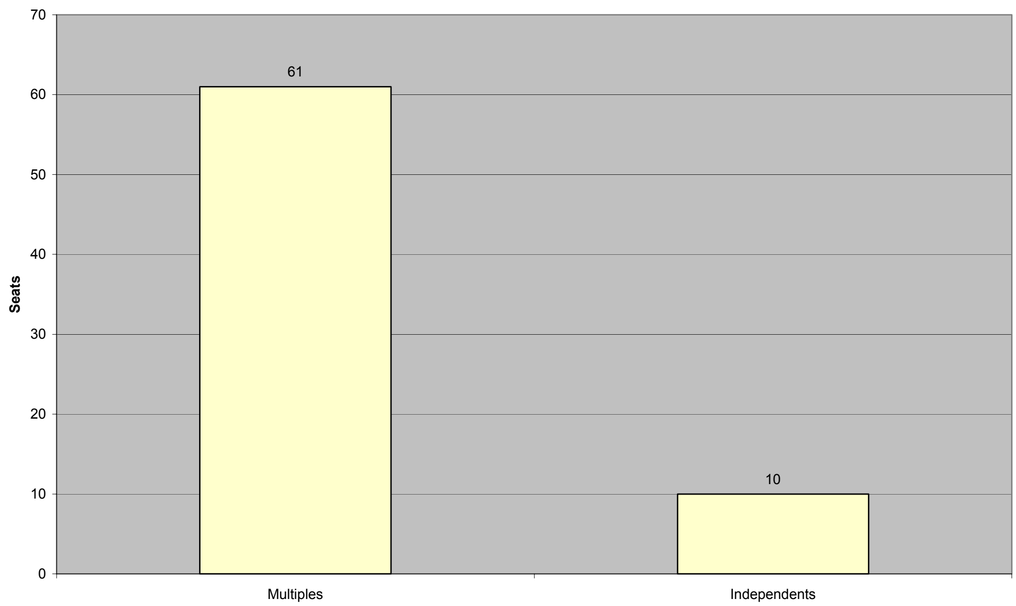


**Figure 7: Cinema Seats in Edinburgh**

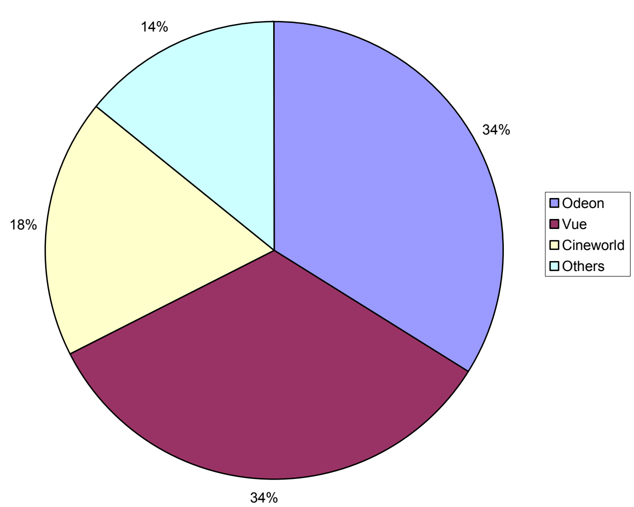


**Figure 8: Ownership of cinema screens in Edinburgh (%)**

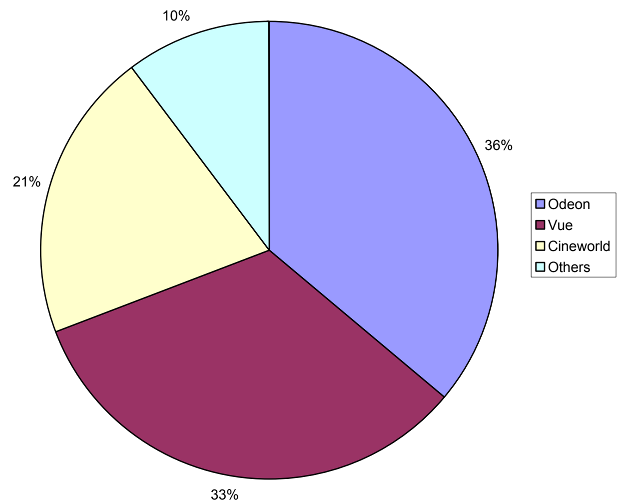


**Figure 9: Ownership of cinema seats in Edinburgh (%)**

The multiples have some links outside of their own commercially-focused activity. For example, Cineworld is used as a venue during the Edinburgh International Film Festival and also hosts some tie-in screenings for Edinburgh University students but, since a recent change in ownership, this venue's education programme has lapsed.

Several of the respondents felt that Edinburgh was fortunate in having a choice of independent cinemas bringing a wider choice of programming and associated events and education than that provided by the multiples. The situation with the Cameo, however, illustrated the delicate nature of the independent cinema sector.

The danger with having such a vast provision in exhibition is that the smaller and less commercial screens get pushed out of the market due to the brand dominance and marketing budgets of the multiples. Losing the independent and art-house screenings would make a sizeable dent in Edinburgh's current Moving Image proposition.

### The Filmhouse

The Filmhouse currently provides a strong focal point of the Moving Image in Edinburgh – it is the base for the EIFF, the main venue for International and art-house programming and a venue for film education and events. The Filmhouse aims to present films differently – for example by presenting seasons of particular directors, or films based around a theme or other connection. The Filmhouse is the one venue that has an education strand, that interacts with students from the various FE and HE courses, that provides links to local communities and entrepreneurs and that combines film with art exhibitions, events, training and festivals.

The Filmhouse maintains a broad range of links with Edinburgh's various communities and with other events taking place in the city. For example:

- Slavonic Arts Festival – though links with the Slavonic Department at Glasgow University and with the local (Edinburgh) Slavonic community
- Story Telling Centre – ran Hans Christian Anderson related films in conjunction with events at the Story Telling Centre
- Master-class on Zorba the Greek – in conjunction with Edinburgh's Greek community
- Urban Ballads – Czech cinema with meet the director event
- Fashion Flicks – tie in with Edinburgh International Fashion Festival
- John Bellany documentary – in conjunction with Open Eye gallery and with John Bellany himself
- Bacon season – linking in with the National exhibition of Frances Bacon's work
- Dali season - Supported by Scotland's Catalan Centre and the Catalan Government's Communities in Foreign Countries department and running alongside a Dali photography exhibition
- Student session for Edinburgh University Media Studies students every Wednesday where tutors introduce the film and provide accompanying notes

The Filmhouse has recently launched Wean's World – a series of children's films that are screened each Saturday morning.

The Filmhouse was widely regarded by respondents as having a good reputation in its programming and its interactions with other institutions (particularly education and community groups). In particular, the venue has a long tradition of providing media education to local schools as well as to the FE and HE institutions. The management has stated their ambition to develop Moving Image education and training as a major stream of both income and activity.

The Filmhouse often collaborates with other similar cinema venues in order to gain economies of scale by sharing distribution costs – for example, the French Film Festival is programmed jointly with Lumiere and the Riverside Studios cinemas (both in London).

The Filmhouse also provides facilities for production companies that want to show their rushes – in practice this is a service that is taken up by the advertising industry and generates a small income of around £8,000 per year for the venue.

The Filmhouse has considered setting up a DVD label for the distribution of new and classic film-related titles that fit in with the venue's programming strategy. This could potentially provide an additional revenue line and could be developed as part of a broader distribution company for Edinburgh.

Screen 3 at the Filmhouse has been upgraded for digital projection. Funding is also in place from the UK Film Council for upgrading screens 1 and 2 and this is expected to take place by autumn 2006.

The Filmhouse has aspirations to become the National Film Theatre for Scotland once its merger with the International Film Festival is complete and preferably once it has secured either bigger or additional premises.

**The Cameo**

The uncertain future, even potential demise of the Cameo was generally regarded as a possibly damaging loss to Edinburgh's moving image sector – several respondents referred to the cinema's "hey-day" when the cinema offered an exciting programme that often combined unlikely pairings of new and classic films, introduced new audiences to quality niche films at the same time embarking on innovative marketing and pricing initiatives. The venue was seen to abandon its niche to some extent and in doing so positioned itself too closely with the multiples in a battle that it couldn't win.

The Cameo Cinema has also run the Jim Poole Scottish Short Film award on an annual basis since 1999.

This competition is well-regarded and previous winners have gone on to achieve further success at international level. For example, one of the 2005 winners, Peter Mackie Burns, went on to win the Golden Bear in the 55$^{th}$ Berlinale International Short Film Competition.

Prizes for the Award total £1500, with the winner of The Belmont Audience Award receiving £500, and the overall winner receiving £1000 and complimentary delegate passes to the Edinburgh International Film Festival.

The award is produced and managed by Marquisde - a film production company based in Edinburgh - and is supported by Scottish Screen, Edinburgh International Film Festival and The Belmont Picturehouse, Aberdeen.

**The Dominion**

The Dominion is an independently owned cinema based in a grade B listed Bowhill Gibson designed building which was the last post-war cinema built in Edinburgh. The Dominion opened in 1938 (as The Embassy). The Dominion offers 4 screens and a total of 662 seats including a selection of luxury leather and sofa style seats.

The Dominion hosts a cinema club and has a café bar. Its programming policy is mainly to cater for family audiences.

**Institute Français d'Ecosse**

The Institute Français screens occasional French language films (with subtitles for non-French speakers) throughout the year. These are video-projected in the venue's 70 seater auditorium. The Institute Français has occasionally linked with the Filmhouse as an addition venue for the Filmhouse's French Film Festival.

**“Red Carpet Venue”**

There have been various comments both during the consultations and in the media that Edinburgh needs to have a “Red Carpet Venue” if it is to compete to host major film premieres.

In the past, the Odeon cinema on Clerk Street was used for this purpose. However, the building was sold to a property developer in 2003 when the Odeon moved out, taking over the ABC cinema on Lothian Road.

The building has since been used as a multi-media venue, in particular during the Edinburgh Fringe Festivals in August 2004 and 2005. Plans lodged with Edinburgh City Council in early 2005 to demolish the building and redevelop as residential use have since been withdrawn and its continued use is currently uncertain.

## 5.3 The Education Sector

A review of Television in the Regions and Nations commissioned by ITC[26] identified the existence of “Academic institutions with high-quality media departments” as one of the core criteria for a television-related cluster. Universities recognise a need for contact within the industry and see that their vocational-related departments and research units can benefit from being integrated with industry players. They are also increasingly interested in working in partnership with Economic Development Agencies on joint innovation and commercialisation initiatives and are becoming increasingly important in adding to footfall and giving an impression of scale in such developments.

The areas of education that are relevant to the moving image strategy include:

- Formal education (schools)
- Further education
- Higher education
- Continuing professional development (CPD)
- Community skills and access initiatives

### *5.3.1 Schools*

There is a growing awareness from a number of public sector agencies involved in the moving image sector that have started to consider the extent to which moving image should be introduced into schools.

[26] Television in The Nations and Regions, Independent Television Commission, 2002.

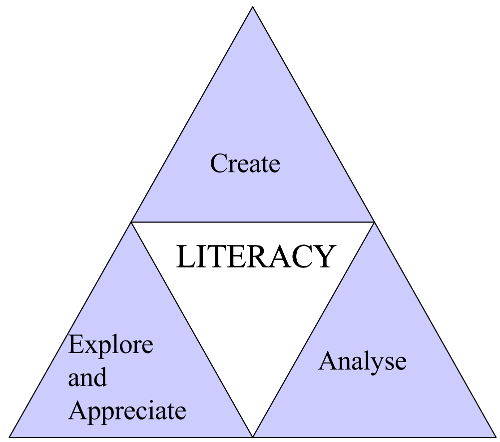

Figure 10: Three forms of literacy for moving image[27]

According to Scott Donaldson, Education Development Executive of Scottish Screen, Moving Image Literacy can take three main forms within the classroom: Create, Explore and Appreciate and Analyse. Each of these three forms of literacy has its own respective relevance to education.

Exploring and appreciating moving image content is analogous with the traditional study of Literature – students engage with particular works, exploring and appreciating them as creative texts. This is the area in which Film Studies modules tend to sit.

Creation is about actually creating moving image content – either through the use of camera equipment or games software, which are increasingly affordable at the required quality, or even through the development of paper-based moving image narratives. The important issue is that students have an opportunity to create content that relates to some of the most prevalent content in their own lives – film, TV, games – and through these familiar media, develop skills in storytelling and structure.

The third form of moving image literacy is concerned with analysis of moving image content. This is arguably the most crucial given that it is concerned with equipping students with the skills they need to understand, investigate, question and evaluate moving image content that they come across in their everyday lives.

The three forms of literacy inter-relate. Involvement in the creation of content drives an extended appreciation of the production and editorial choices that then influence our analysis of content. By exploring and appreciating content there is a better understanding of what goes into a quality creation. The links go on.

Most parties are agreed that at the schools level, technical skills and specialisation in particularly moving image roles is much less useful than a general and holistic understanding of moving image.

[27] With thanks to Scott Donaldson of Scottish Screen for the concept behind the diagram

For example, Skillset's general recommendation with respect to schools education is that Media Literacy be pushed up the agenda but that over-specialisation at the schools level should not be encouraged. This general approach is supported by a broad range of different groups and is compatible with for example, Ofcom, which also has a commitment to improving Media Literacy across its citizen consumers.

Scottish Screen has piloted a number of schemes to further moving image within the classroom. Notably, the agency has initiated a professional development drive amongst teachers in Edinburgh and Lothian. This involves two lead practitioners being appointed to each cluster – one a teacher with an interest and training in moving image and the other a moving image professional. These lead practitioners are then booked into classrooms to provide sessions for class teachers that promote moving image use and literacy.

This scheme has not been evaluated as yet, however, results from a similar initiative running in Brechin, Angus have shown encouraging benefits in terms of improved attendance rates amongst repeat-truants, as well as increased moving image literacy skills.

Given that Edinburgh has already begun developing this scheme and its associated links, there appears to be an opportunity to take the lead within Scotland for developing moving image within the classroom.

The feedback from Arts and Learning, Children and Families at Edinburgh City Council was there is an opportunity to increase the awareness and use of moving image within non-curricular activities and also to promote moving image techniques for appreciating other subject areas.

### *5.3.2 Further Education (FE)*

Within Edinburgh's FE sector there is a strong sense of both course provision relating to the moving image sector, and also of interaction with the industry.

There are five main providers of moving image-related FE courses in Edinburgh and Lothian:

- Jewel and Esk Valley College
- Edinburgh Telford College
- Stevenson College, Edinburgh
- West Lothian College
- WHALE Learning Centre

These provide a variety of qualifications right across the Scottish Qualifications Agency (SQA) framework.

A breakdown of relevant provision is provided in Appendix 4. The FE colleges in the area provide a range of courses covering levels from access up to HND and also provide transitions into the Universities' degree courses.

For example, Stevenson College typically has around 300 students studying moving image-related courses across its full-time and part-time courses plus an evening class of around 100. The college provides routes for non-traditional learners including those with no formal qualifications – taking them through potentially to degree level, where appropriate.

Many of the courses at Stevenson College include work placements as standard and as a mandatory element within the HND/C routes. The college has therefore developed links with local employers in particular with the facilities providers, Sound and Vision and Hammerhead TV but also with selected production companies based in Scotland, London and further afield.

The lecturers within FE usually have an industry background. For example, the team at Stevenson have backgrounds and on-going professional interests in documentary, animation, sound and video. The staff appear to have strong links with other moving image professionals in Edinburgh and are proactive in involving their students in events such as training courses, RTS lectures, Scottish Students on Screen and the Media Information Days[28]

The FE colleges are aware of the need to maintain equipment and facilities that are relevant to the needs of the modern moving image industry while at the same time battling against escalating costs in maintaining the latest upgrades of software and equipment. Approaches to balance these pressures are mainly gained through collaboration– for example, a group of colleges from Scotland (including Stevenson, Jewel and Esk Valley and Telford College) have formed a joint purchasing arrangement with the specialist software provider, Avid. Through this arrangement the colleges have a cost-effective method of securing professional level software, training courses and accreditation for its students. A further example of cross-college collaboration is in the provision of new HND/C routes that run between colleges, with each providing specialisms rather than trying to replicate all provisions across the different institutions.

The FE colleges in Edinburgh have also been proactive in developing their links to HE. Stevenson College has strong links in place with both Queen Margaret University College and Napier University so that there is an almost seamless transition from the HND/C to the degree level courses. This is effective in terms of maintaining the impetus of the teaching and learning, and also in keeping local students within the local education system.

The FE colleges also have links with the community sector – so that students can come through from short courses at Pilton Video or Media Education – or alternatively those without sufficient background can be directed first to the community sector to try informal approaches before signing up to an FE level course.

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[28] Supported by Scottish Screen, Skillset, BBC, MediaGuardian, Avid, Agcas, Channel 4 and smg

### *5.3.3 Higher Education (HE)*

The following HE institutions in Edinburgh are involved in activity of relevance to moving image:

- University of Edinburgh
- Napier University
- Edinburgh College of Art
- Queen Margaret University College
- Heriot Watt University

A summary of the main HE provision relevant to moving image is provided in Appendix 5.

Edinburgh is fortunate in having such as strong HE sector – its institutions demonstrating strengths in all three of their key activities:

- Learning and Teaching
- Research
- Innovation and Enterprise

A tradition for collaboration has already been set as the HE institutions have strong links both with others in the city and further afield. Most notably is the new collaboration between Napier University and Edinburgh College of Art, which were jointly awarded Screen Academy status in 2005 – becoming the Scottish member of the Screen Academy network. Many other links exist, however, that also play a role in moving image in the city.

**Edinburgh University**

The Department of Informatics at the University of Edinburgh has a direct engagement with the visual arts (including moving image) through its involvement with Future Academy Studiolab (Edinburgh College of Art are the lead partner) and through its support of research artist in residence, Richard Brown, who creates interactive artworks using multi-media technology, computer programming, electronics and interfacing.

The university is also involved through its development of innovative R&D projects, such as "Hands On" a haptic[29] interface for design (in conjunction with Edinburgh College of Art) and "Spellbinder" a technological development in mobile pervasive technology, both of which have been supported through Scottish Enterprise's Proof of Concept fund.

The department of Informatics at Edinburgh is the largest in Europe and an important base for knowledge transfer, international stage research and policy work.

The department holds a view that moving images are becoming an increasingly important modality for information in all sorts of environments – from education to medicine, tourism to biology.

[29] Haptic technology provides the user with an interface based around the sense of touch

Of particular relevance to this strategy is the belief that moving image can boost key industries in the city, with applications including games and interactive software, digital curation and distribution of content, delivery of education, support services and cultural activities.

Existing links exist between the University of Edinburgh and Edinburgh College of Art. The Department is keen to develop these links further within its wider goal, which is to support more effective linkages between creative and technical competencies.

**Napier University**

Napier University has developed a strong reputation for its creative industries courses – including publishing, journalism, communication, mass communication, photography, film and imaging. Napier has the largest intake of practical-based media students in Scotland with around 250 undergraduates enrolled.

At the time of writing this strategy, Napier was undergoing a re-structuring of its creative and media departments as 'The School of Creative Industries' which includes Music and Cultural Studies as well as Design, Journalism, Publishing, Advertising, Communication and Lens media.

Some of Napier's staff are involved in the development of public policy and researchers are pioneering the practice of research through practice – which is of particular relevance to creative industries professionals both within Edinburgh, Scotland and further afield.

The creative and media activities at Napier are supplemented through links with the computing department, in particular for the purposes of developing interactive media projects.

Napier boasts a high level post-production facility. This is primarily aimed at students, but can also be offered to visiting professionals on an ad hoc basis. This runs like an informal projects office – providing practitioners with valuable access to high quality facilities and providing students with the exposure to professional working practices and potentially opportunities to gain work experience.

Recent successes for Napier graduates include:

- Cineworks 2005 – Nick Gibbon commissioned to make the film "Surburban House"
- Simon Dennis – Won the Innovation Award at Ohio Independent Film Festival and the Best Cinematography Award at the Sci-Fi London Festival Awards for his film "Iota". This film was also nominated for the Jim Poole Award
- Manuela Mancini had two films selected for showing at the Italian Film Festival at Riverside Studios in London: "Nightswimming" and "On the Loose"
- Simon Hynd's films "Two-Way Split" and "No More Good Causes" reached the second round of Fast Forward Features, a competition supported by BBC, Content Films and Scottish Screen. Simon Hynd was also invited to participate in Berlinale Talent Campus

- Wendy Griffin's "Funny Kinda Guy" won the Audience Choice for Best Documentary at the Melbourne Queer Film Festival and was also selected for showing at the Commonwealth Film Festival in Manchester
- Colin Addison's film, "The Gloaming" and Robbie McKillop's film "Mono" were both nominated (alongside Simon Dennis' "Iota") for the Jim Poole Award

The Department of Design and Media Arts at Napier also offers graduate scholarships to support its graduates to make the transition into employment. Open to recent graduates of the department (within the past 2 years), those eligible can apply for up to £2,500 support towards a business, project or career development idea. As well as the funding, successful applicants also get access to the department's facilities and staff, including a mentor for advice on aspects such as business development, prototypes and marketing.

Edinburgh College of Art (eca)
eca offers a number of courses relating to moving image at both undergraduate and post graduate levels. These cover animation, film and TV and graphic design.

Recent successes for eca graduates include:

- Asaf Agranat and Gunhild Enger shortlisted for 2006 Royal Television Society Student TV Awards. Asaf Agranat was nominated for “A Bus Ride” and “Flowers in her Hair” while Gunhild Enger was nominated for “Waiting for Happiness” and “Bargain”.
- Astrid Bussink won Best Documentary Short at the inaugural European Independent Film Festival in Paris for her film “Angelmakers”
- Michael Hughes won an animation award at the 2006 Scottish Students of Screen Festival for his film “Adore”
- Asaf Agranat won Best Animation for “A Bus Ride” and “Flowers in her Hair” in the 2006 BAFTA Scotland awards
- Also in the 2006 BAFTA Scotland awards, Samir Mehanovic won Best First Time Director for his film “The Way We Played” – another eca graduate, Andrew Henderson had also been nominated in the same category for his film “The Rest is Silence”

eca hosts the Scottish Documentary Institute (SDI), which carries out research into documentary, holds an archive of documentary film-making and organises the distribution of documentary films. SDI aims to provide a platform for industry and academia to collaborate on documentary-related activities. To this end, SDI runs master classes, invites industry and academic speakers and runs training schemes.

SDI is a member organisation of Docspace – the European network for the distribution of documentary. Operating in seven countries Docspace selects documentary films (in digital format) on a monthly basis to be distributed across Europe. This helps to bring work to a wider audience. Docspace has plans to start distributing content over broadband networks for viewing on multiple platforms. This approach would mean that distribution could be to smaller and more local venues such as libraries, film clubs and even to TV screens in the home as well as to traditional cinemas.

While eca does not have its own Research and Enterprise (R&E) department, the college is nevertheless involved in a number of commercialisation and knowledge transfer initiatives and projects. eca has developed strong and productive links with the University of Edinburgh. For example the “Hands On” proof of concept project draws on expertise from eca and from University of Edinburgh and has an assigned commercialisation officer from the University of Edinburgh’s R&E team. Other collaborations include Future Academy/Studiolab (see section on University of Edinburgh, above).

**Queen Margaret University College**

Queen Margaret University College (QMUC) has both strong drama and media departments.

The Drama department sits within the Faculty of Business and Arts in the School of Drama and Creative Industries. In particular, QMUC has a strong track record in developing actors for TV through its undergraduate Acting and Performance programme and its MA/MFA/PgDip in Advanced Stage and Screen Practice.

QMUC's Media , Communication and Sociology Department focused primarily on the theoretical aspects of moving image – the cultural, sociological and philosophical treatment of film, TV and other media content. Some of the specialisms within the department include:

- The "Media"
- Film and documentary
- New media in the PR industries
- Cultural study of TV genre
- Film and TV Melodrama
- Cultural Capital
- Discourse analysis
- Disability and culture

**Screen Academy**

Screen Academy is the collaboration between Napier University and eca that was selected in 2005 as the Scottish participant in the Skillset Screen Academy network.

Skillset's aim in setting up the Screen Academy network was to identify centres of excellence in film education and training. There are six Screen Academies across the UK plus a Film Business Academy (at Cass Business School in London). These were selected by a stakeholder group made up of industry, academic and public sector representatives.

The Screen Academies aim to develop their provision in line with industry needs, to work with industry to share best practice and to help match-make emerging talent with employment opportunities.

For eca and Napier, achieving Screen Academy status means a level of recognition for their existing provision. It also means a commitment of funding from Skillset, which has committed £4.3 million between the six Screen Academies over two years plus £300,000 from the Scottish Executive over the same period. Screen Academy status in itself is likely to be a strong aid in leveraging additional support from funding agencies and sponsors.

Screen Academy is also creating a number of new jobs – for example, the partners advertised four teaching posts plus three administrative posts in March 2006.

The stakeholders that we consulted during our research were almost unanimously supportive of Screen Academy and there was an overwhelming agreement that Screen Academy had raised the profile of Edinburgh's moving image sector.

Furthermore, Screen Academy was seen as an opportunity to raise standards of teaching, to attract interesting and important figures from the industry and academia to the city, to help retain new graduates for longer and to attract promising new International talent.

In its first year Edinburgh Screen Academy focus has been on the development of the Masters programme. This programme has a strong practical element, underpinned by theory – an approximate 65:35 split for practice and theory respectively. The programme has a high degree of input from visiting professionals as well as from in-house staff from both institutions. Students on the programme receive around 50 – 75% of their funding plus, in some cases, it is possible to access additional maintenance bursaries. In addition, a production fund for students supports production and the Screen Academy is able to negotiate good deals for lab work, facilities, post production and equipment supply through its long standing relationships.

In its second year, the emphasis is set to shift so that there will also be CPD based activity – short courses closely linked to industry. The Screen Academy will also aim to work with communities – providing outreach and developmental elements within its activities.

At the time of writing this strategy, Screen Academy did not have a physical base. Napier University was in the process of fitting out new post-production facilities adjacent to its Merchiston campus – this has involved a £1 million investment from the University's funds for the building plus an additional £0.5 million for equipment and fitting. But there was still potential for a Screen Academy base separately somewhere in the city – potentially grouped with other moving image related activity.

**Edinburgh Learning**

Edinburgh Learning was a partnership of learning organisations within Edinburgh and Lothian that aims to support a culture of learning in the city. The partners were Careers Scotland, the University of Edinburgh, Edinburgh Chamber of Commerce, Heriot-Watt University, The City of Edinburgh Council, Scottish Enterprise Edinburgh & Lothian, Stevenson College Edinburgh, Napier University, Edinburgh's Telford College, Queen Margaret University College, Jewel & Esk Valley College and the Workers' Educational Association (Scotland).

Edinburgh Learning was set up in 1997, primarily to support the City of Edinburgh's status as a "city of learning". In a 1997 declaration, the city announced a commitment beyond its statutory duties to create a "lifetime, life wide learning city"[30]. While this project is now closed,

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[30] ELLP Business Plan and Action Framework 2004-2007

the fit of the city with the central theme still resonates, particularly with respect to Moving Image.

### *5.3.4 Continuing Professional Development*

Both the availability and accessibility of Continuing Professional Development (CPD) for moving image practitioners is a core concern for Skillset on a Scotland and UK wide basis. There is a general lack of availability of high quality CPD opportunities outside of London and the South East and many out of London practitioners have no choice but to travel to train.

With a large proportion of freelancers and micro-businesses dominating the sector, there is a large risk that CPD simply does not happen at all due either to lack of time, funds or suitably convenient provision.

There are moves to increase CPD provision for the sector, backed by Skillset, PACT, NESTA and other agencies.

Part of Screen Academy's remit for its second year is to provide opportunities for CPD in areas such as screen writing. This will add to current provision of CPD through Scottish Screen and PACT.

In addition, Edinburgh is home to Moonstone International, which provides high-level skills enhancement and development opportunities for moving images professionals. Moonstone provides three screen labs per year – one for filmmakers and two for screen writers. These are open to filmmakers and screen writers across Europe and provide an environment in which participants can explore their creativity, ideas, skills and techniques within a supported and supportive environment. The initiative has the backing of some of the industry's key players. It is funded through the Media programme of the EU, Scottish Screen, FAS/Screen Training Ireland and Mitteldeutsche Medienforderung Gmb (MDM).

We believe that the strengths of the FE and HE institutions combined with input from some of Scotland's key practitioners and through both Edinburgh's moving image related festivals could provide an ideal starting point from which the city can develop a provision and reputation in CPD that is second in the UK only to London.

"The real problem is lack of experience, not a lack of colleges. The BBC and SMG are no longer so good at providing this 'on the job' training" – Owner of a UK TV production company

There is also an option provided by the SQA for providers of training and CPD to have their training units credited through the Scottish Credit and Qualifications Framework. This means that learners can gain professional accreditation and recognition of formal learning simultaneously. For example, the Chartered Institute of Bankers in Scotland has registered a number of courses at SQCF Levels 7 and 8 in subjects such as Mortgages, Investment and Risk and Financial Services.

At the time of preparing this document there were no registered courses of relevance to the moving image sector – but there is scope for providers to add them either in any of the following categories:

- Providing Business Services
- Communicating and Entertaining
- Developing and Extending Knowledge and Skills

### 5.3.5 Community Skills and Access

Research by Ofcom's Consumer Panel[31] interviewed 2519 consumers with a representative sampling of socio-economic groups – 426 (17%) of these were in Scotland. The research found some differences in the awareness and use of new platforms in Scotland than across the UK. For example, 41% of respondents in Scotland did not access the Internet, compared to just 35% as the UK average. This was particularly clear from the communities such as older people (aged 65 and over) and those in low-income households (under £11,500 per year). The research also found significantly higher levels of "difficulty using a PC" than the other nations – at 8% compared to a UK average of just 5%.

However, the same study found ownership of digital TV (around 55% in Scotland) was not significantly lower than the UK average (57%).

## 5.4 The Support Infrastructure for the Moving Image sector

The following section deals with the support infrastructure for moving image sector businesses and commercial operations. Other aspects of support are covered elsewhere, for example within sections on education or community.

### 5.4.1 Edinburgh Film Focus

Edinburgh Film Focus (EFF) is Edinburgh's Film Office. Set up in 1990 as Scotland's first film office, EFF's raison d'etre is to maximise the economic and other benefits to be gained from on-location production. The overall aim is to increase the amount of film production in the geographical area of remit: Edinburgh, the Lothians and the Scottish Borders. Specific objectives of the organisation are:

- to increase enquiries and productions and the average value of each production
- to increase the number of contacts on the database
- to increase the outward business profile through building relationships in the related tourism and business communities at local, regional and national level

EFF is supported financially by the local authorities for the areas it represents: City of Edinburgh Council provides around 67% of the £120,000 budget, the Borders council contributes around 20% with the remainder split between East and West Lothian Councils. The EFF handles around 350 enquiries per year and is run by 2 – 3 staff.

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[31] Saville Rossiter-Base, *Ofcom Consumer Panel Research Quantitative Research Findings – Focus on Scotland,* April 2005

EFF's core remit is to provide location facilitation for producers wanting to film in the Edinburgh. To this end, EFF acts as a conduit for all the aspects that are needed, including those that involve the Council. EFF helps to ensure that filming in the city runs as smoothly as possible for film-makers, while at the same time minimising disruption to local people. EFF works closely to advise and support students who want to film in the city as well as professional film-makers.

Within its role, EFF also monitors productions that are taking place and monitors spend on productions.

EFF also plays a role in acting as a central point for production in Edinburgh. As EFF has good links into the production community – including producers and crews – it has been well placed to initiate and facilitate the First Tuesday Producers' Network.

Our consultations with producers have repeatedly highlighted positive feedback on the work of EFF. However, these have been qualified by statements comparing the film office provision in Edinburgh to that of Glasgow. Glasgow Film Office (GFO) has been funded through Scottish Enterprise Glasgow and Strathclyde European Partnership (drawing on West of Scotland Objective 2 European funding) and employs six staff. GFO provides some financial assistance for skills development and business support for local businesses and has successfully secured seed funding for productions from Glasgow City Council and from Scottish Executive. GFO is regarded by producers as being a more powerful organisation than EFF with more budget and a wider remit for supporting production and the growth of the sector.

### *5.4.2 Scottish Enterprise Edinburgh and Lothian*

Scottish Enterprise Edinburgh and Lothian (SEEL) is the main economic development agency for Edinburgh and Lothian and as such takes responsibility for providing a range of services supporting local businesses and individuals.

As most of the businesses within the moving image sector are either freelance or micro businesses then the main support from the Scottish Enterprise network is through Business Gateway and through project sponsorship.

Within the operating plan for 2005-6, Creative Industries, Micro and Opto Electronics, Software and Tourism are identified as the key target sectors for growth[32] - the aim being to support growth and in particular, internationalism within these sectors.

Several businesses from the creative industries cluster have benefited as Scottish Enterprise priority companies. These are supported by the High Growth Team in terms of business support and mentoring services as well as some gap funding. The opportunities are there for moving image based businesses to seek support from the High Growth Team – they need

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[32] Scottish Enterprise, *Scottish Enterprise Edinburgh and Lothian Operating Plan Summary 2005-2006*

though to qualify against the standard set of 14 criteria that apply across the board for all sectors.

Within SEEL, the creative industries sit within the technology team and the focus for support is on the creation, production and distribution of digital content – rather than on analogue methods. This means that digital innovations such as games and interactive platforms fit more comfortably into the remit than, say, traditional forms of film-making or other more cultural aspects of the creative industries.

Having said this, there are instances when SEEL has supported more cultural activities – mainly through partnerships and where there is a demonstrated benefit either from the point of view of developing tourism (for example, providing support for Edinburgh's hosting of the MTV awards) or as part of the regeneration remit (for example, support for the redevelopment of the Storytelling Centre).

In addition there are several specific existing SEEL projects of relevance to the moving image strategy:

- Creative Edinburgh – providing a portal for information, about and for, the creative industries in Edinburgh as well as a range of networking and training events
- Capital Streets – which may offer opportunities to support moving image related events and activities within its remit to "continuously animate the spaces"[33] within the improved built environment
- Edinburgh Science Triangle – this initiative aims to bring together centres that includes Alba Campus in Livingston, Biocampus, Edinburgh Technopole, Pentlands Science Park, Roslin Biocentre, Heriot Watt Research Park and the Centre for Biomedical Research in Edinburgh as a step towards creating an "ideas and knowledge hub". The emphasis for the Edinburgh Science Triangle is very much on technology rather than content – however, the digital media related (moving image) innovations that are emerging from the R&D within University of Edinburgh and elsewhere in Scotland fall very much within the general remit of some of these centres.

### *5.4.3 Business Gateway*

There are a total of 7 Business Gateways in the Edinburgh and Lothian region. These are Scottish Enteprise's shop-front for supporting start-ups and small businesses. Business Gateway provides support and information on a range of issues such as: finance and grants, taxes and payroll, employment, tax and legal issues, health and safety, sales and marketing, e-commerce and IT, business growth and networking.

Business Gateway provides some advice through its own advisors and also acts as a conduit to other sources of help and support. Business Gateway runs seminars and events as well as providing surgery-type support on a one-to-one basis.

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[33] Scottish Enterprise Website, www.scottish-enterprise.com

Anecdotal evidence suggests that creative industries businesses tend not to make full use of the Business Gateways. This is not a phenomenon that is specific to Edinburgh, or indeed Scotland. We have found similar effects across England where creative businesses do not feel that generic business support services (such as those delivered through Business Link) are relevant to them. This is to some extent a hang-over from the days when business support and investment was targeted at "traditional" product or service based businesses and where knowledge and talent based business models were less well understood. In fact, part of the problem now is a lack of information or awareness amongst creative businesses that in reality Business Gateway can be a useful first stop and intermediary to other more directed support.

### *5.4.4 Cultural Enterprise Office (CEO)*

In recognition of the needs of creative industries for specific business support provision, Cultural Enterprise Offices have been set up in Glasgow, Edinburgh, Aberdeen and Dundee. They cover similar areas of business support to the Business Gateways but focus exclusively on the creative and cultural industries.

CEO operates from the Stills Gallery in Edinburgh offering a range of One to One Advice Sessions, Information and enquiry services, seminars, training and networking events.

In addition to the generic business support function of CEO, they also maintain a pool of art-form specialists that provide specific support. There are, for example, specialist advisors for film, TV, performance and animation.

CEO also provides advice sessions for existing cultural businesses that concentrate of finance, tax, marketing and legal advice – these are delivered by professional services agencies with specialist consultants that specialise in creative businesses

- Scottish Screen
- Scottish Arts Council
- New Media Scotland

# 6 FESTIVALS, TOURISM AND PLACE-MAKING

## 6.1 Festivals

Edinburgh's Festivals are (arguably after Edinburgh Castle) the most important element in its cultural portfolio. In a recent survey of over 2,300 visitors to Edinburgh[34], 12% stated that they had attended a "Festival Event" during their visit. This compares with just 7% going to concerts and 6% going to the theatre. Remembering that the festivals only run for a few weeks of the year and the figures for other activities are for the full 12 months, these are remarkable results. Of those that stayed in Edinburgh for four or more nights, 21% attended a festival event.

Edinburgh's main moving image related festivals are the Edinburgh International Film Festival, MediaGuardian Edinburgh International Television Festival and the Edinburgh Interactive Entertainment Festival. In addition there are aspects of other festivals including the Edinburgh International Book Festival, The Edinburgh International Festival, The Edinburgh Fringe Festival and the Edinburgh Science Festival that have relevance to moving image. There are also a range of smaller film festivals that take place throughout the year based around Edinburgh Filmhouse – such as French Film Festival, Italian Film Festival and others.

### *6.1.1 Edinburgh International Film Festival (EIFF)*

Edinburgh International Film Festival started in 1947 and as such is the longest continually running film festival in the world.

EIFF aims to "entertain, educate, challenge and inspire" and to this end provides a broad range of screenings and events during its 2-week annual activities.
EIFF takes place at the height of Edinburgh's festival season in August each year and plays an important role in the city's festival portfolio.

In 2005, EIFF screened 100 feature films (including 14 premieres) and 150 short films from 40 different countries. Additionally EIFF ran 30 industry events[35]. The programming for EIFF is varied:

- Promoting new talent while also running retrospectives of major established players
- Showcasing British film alongside a broad range of International work
- Retaining a special interest in documentary, while also showing a range of fiction and other genres

The festival is funded through three main sources:

- Earned income, which for 2005 contributed 27% (including total box office takings for the year of £269,000
- Sponsorship and donations which contributed 43%

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[34] Lynn Jones Research, *Edinburgh Visitor Survey May 2004 – April 2005,* August 2005
[35] Edinburgh International Film Festival Review, 2005

- Grants which came it at 30%

Prior to the 2005 EIFF, grant aid had been at a level of 15% of costs for a number of years. However, reductions in corporate sponsorship had hit the festival hard and, although the box office takings increased by a healthy 14% from 2004 to 2005, EIFF has had to turn to the public sector for additional support to cover the short-fall for 2005 and 2006.

EIFF clearly needs to either attract some additional funding, or reduce costs. A combined approach to this problem is implied in the plans to merge EIFF and the Edinburgh Filmhouse. Merging the two organisations:

- enables sharing of resources and skills (and costs)
- provides a structure in which to run a more formal programme of film festivals around the year
- gives credence to a growing ambition for Edinburgh Filmhouse to gain "National" status as a National Moving Image Centre for Scotland.

**New platforms**

Increasingly, the delivery platforms or modes of exhibition are varied. In addition to traditional screenings, EIFF now also takes advantage of the digital screening facilities available at the Edinburgh Filmhouse.

It also presents films on a large open air screen, prominently situated on The Mound. The outdoor screenings – "Film Festival under the Stars" - are aimed at attracting a wider audience and tend to feature classic films with a Scottish connection as well as short films, music videos and animation. The screen has been sponsored by Famous Grouse (Whisky).

For the first time in 2005, EIFF also gave incorporated "screenings" of original short films for mobile devices - Pocket Shorts and Pocket Shorts Scotland. Pocket Shorts Scotland was funded by Scottish Enterprise, Scottish Screen and NESTA.

Pocket Shorts aims to give new filmmakers, animators and content providers opportunities to experiment with mobile technologies and create short films for delivery via mobile phones.

The scheme was open to graduates with less than 5 years experience and provided maximum budgets of £3,000 for films of up to sixty seconds duration. The scheme funds around eight projects per year and showing at festivals such as EIFF is one of the highlights.

**Young People**

The festival also plays a role in promoting the moving image industries amongst young people.

- EIFF runs Media Days for media studies students that include screenings and producer/director events
- Young people's own films are shown through EIFF's relationship with SKAMM (Scottish Kids Are Making Movies)

- EIFF involves over 200 temporary workers each year who are responsible for a variety of tasks while the festival is in progress – including front of house, operational and back-office roles. Of these around120 are volunteers, 9 are placements or interns and around 80 are paid staff. The intern and volunteer programmes are the main opportunities for young people to get involved with the festival, gain valuable work experience, build their understanding of the industry and start to make industry contacts

**Industry event**

In 2005, EIFF attracted over 640 industry delegates. The festival provides a specific centre for delegates in a separate venue which contains a range of services including: press centre, videotheque, where all films in the festival and the collection of all new British productions are available to view on video, an Industry Office, where advice and meetings take place, business communications (including internet access) and social space. There are also display areas for major funders.

EIFF hosts a number of key awards. These include:

- Standard Life Audience Award
- Michael Powell Award for Best New British Feature Film
- New Directors Award
- Kodak UK Film Council Award for Best Short Film
- McLaren Award for New British Animation
- European Film Academy Short Film Award/Prix UIP
- Saltire Society Award for Short Documentary
- As with the festival itself, the range of awards reflects the aims of supporting new and established talent, home and international achievement, animation and documentary alongside feature film.

**Impact**

Within the consultations that we conducted, EIFF was identified by a broad range of stakeholders as a key element of the Moving Image sector in Edinburgh.

*"The Film Festival has such a wide audience – there would be long term implications if we didn't support and sustain this"*

*"The Film Festival and awards gives status to the city – it's very important to maintain the impetus"*

The scope of the strategy did not allow for us to undertake a major piece of market research, but some of the stakeholders made general anecdotal observations about the festival:

Positives:

- Puts Edinburgh on the map in terms of Moving Image

- A major deciding factor in locating in Edinburgh
- An important event in Edinburgh's tourist calendar
- Part of the festival portfolio

Some of the criticisms of the festival included:

- Some film makers felt that EIFF should focus more on Scottish film and local interests (however, others felt that while representing Scotland and Scottish film was a good thing, EIFF should maintain its "International" focus and avoid becoming parochial)
- Some felt that the target of EIFF could be clearer – so that strategically it should aim to raise its profile as either a market place or an industry event or an audience focused festival
- Several respondents felt that EIFF could do more to attract new audiences

We should also bear in mind that these comments are from industry stakeholders. EIFF is a public festival and needs to support its audiences as well as the industry.

EIFF has historically attracted 30% of public funding compared to festivals of similar status such as Berlin attracting 40% of public funding[36]. The fact that this historical success of attracting private funding has shown a marked decrease in recent years needs to be explored as, in theory, particularly in the absence of an indigenous major broadcaster/publisher, much of the moving image sector in the city could and should be driven by an internationally significant showcase that brings the moving image to Edinburgh.

It may well be that the EIFF will require a phased development strategy in order to enable it to move on to a sustainable, long term funding position that could see it become the keystone brand of Edinburgh's moving image sector and activity. In order to support a greater industry contingent, it would be useful to run a scheme focussing on recruiting major buyers to the event. However, the broader question involves growing the event based on increasing audiences, increasing delegates and raising the event's prominence in the film festival calendar. EIFF is investigating potential sustainable routes to growth – the festival is undoubtedly one of the key elements in Edinburgh's Moving Image sector currently and should continue to hold that position within the strategy.

### *6.1.2 MediaGuardian Edinburgh International Television Festival (TV Festival)*

Like the EIFF, MediaGuardian Edinburgh International Television Festival (TV Festival) takes place on an annual basis in August. However, MGEITF is a very different type of moving image festival to EIFF. It is clearly targeted at an industry audience. While many of the sessions would no doubt have appeal to the public, the pricing strategy alone (a fixed fee for the entire conference, set at industry rates) excludes public participation.

[36]http://www.berlinale.de/en/das_festival/business_to_business/berlinale_und_partner/index.html

The TV Festival has been running in Edinburgh since 1976. It is attended each year by around 1,900 delegates, most of whom are active in the TV industry. The event is organised and managed from London – with the organisers only moving up to Edinburgh for the duration of the festival itself.

The McTaggart Lecture is the most prominent event in the TV Festival. Presented by a former director-general of the BBC, chief executive of a major broadcaster or other major industry player, this lecture gains UK press coverage for what are often controversial thoughts and insights on the current state, or trends of the industry. The McTaggart Lecture is an important event for Edinburgh's Moving Image sector as it communicates the city's link with thought leadership, innovation and with moving image (in this case TV).

Although the speakers themselves are not usually native to Edinburgh, the setting presents an important image of the city as the place where the movers and shakers of the industry meet, think and do business.

### *6.1.3 The Edinburgh Interactive Entertainment Festival (EIEF)*

The Edinburgh Interactive Entertainment Festival is an annual event that also takes place at the height of Edinburgh's festival season in August. The event is primarily aimed at industry, though it does also organise public events and there is an indication that the festival intends to extend the public-focused events for the 2006 event.

The main elements of EIEF are:

- a two-day conference, with accompanying trade show
- games screenings at The Odeon on Lothian Road (open to the public)
- networking and party

For the 2006 event, EIEF is chaired by Chris Deering, formerly of Sony Europe. This gives some indication of the credibility of the event which aims to be the main industry event for interactive entertainment.

The festival is emerging as a key event within the European circuit – filling a gap between commercial conferences that tend to be focused on business to business marketing, and the arts-centric new media festivals such as Northern Lights.

## 6.2 Place-making

One of Edinburgh's key strengths from the point of view of any of its inhabitants, employees, entrepreneurs, academics or artists is its beauty and splendour as a city.

A resounding agreement throughout the consultations for this project was that any inconveniences about being located in Edinburgh were out-weighed by the city itself.

Edinburgh has other general benefits which are summed up in the following themes:
*Innovation, Diversity, Skills, Connectivity, Strategic Capacity and Quality of Life*.

- The city is well qualified – with almost 40% of its inhabitants holding degree level qualifications[37] (compared to around 28% for Glasgow)
- It enjoys high levels of employment – with only around 2.2% unemployment – well below the Scottish average
- The city is considered to offer the benefits of a city – ie access to cultural experiences and high quality facilities but within an area that is more usually associated with a medium sized town
- The City is small enough that it is relatively easy to get to know the people you want to do business with but large enough to support like-minded communities of people and employment opportunities across a variety of fields
- Edinburgh is home to a cosmopolitan selection of inhabitants and a balance between its indigenous and its transient populations
- Edinburgh offers a broad range of Educational opportunities with its range of universities of colleges and as a strong tradition of innovation and invention through its universities, entrepreneurs and financiers
- One third of the workforce of Edinburgh lives outside the city – the daytime population increases from 449,000 to 520,000 in working hours

For those that choose to live in Edinburgh, advantages of the city clearly outweigh any disadvantages. However, there are also aspects of place-making that can be affected by the moving image sector itself that can help to increase the city's appeal and stimulate the growth of the sector.

### *6.2.1 Edinburgh – Inspiring Capital*

Edinburgh has recently undergone a city-wide rebranding exercise, which has resulted in new visuals and a strap-line. Edinburgh – Inspiring Capital fits very well with the sentiment and action plan for the moving image strategy – embracing a similar set of elements and values.

The Edinburgh City Region Brand is a Public Private Partnership. The public sector partners are the City of Edinburgh Council, Scottish Enterprise Edinburgh and Lothian, and VisitScotland Edinburgh Network Office.

Through a period of research and consultation, the partners have developed a brand that focuses on Edinburgh's strengths in terms of its heritage, history of innovation, its unique natural and built environment, and its overall ability to inspire its visitors and residents.

The values of the Edinburgh Brand are[38]:
'INVENTIVE VISIONARY' - Edinburgh excels in the arts, science, business and education.

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[37] Noone, V. *Economic Intelligence,* Scottish Enterprise Edinburgh and Lothian Management Team, October 2004

[38] http://www.edinburghbrand.com/about_our_brand/values/

'RICH DIVERSITY'- Edinburgh has a vibrant and cosmopolitan culture with a great mix of people and skills - all within a setting of inspiring architecture and natural beauty.

'STRIVING FOR EXCELLENCE' - Edinburgh and Scotland share this work ethic, which drives the city's past successes and future ambitions.

'SINCERE WARMTH' - Edinburgh people extend a helpful, genuine welcome to all.

'UNDERSTATED ELEGANCE' - Edinburgh is not boastful or arrogant about its achievements, but quietly confident in everything it does.

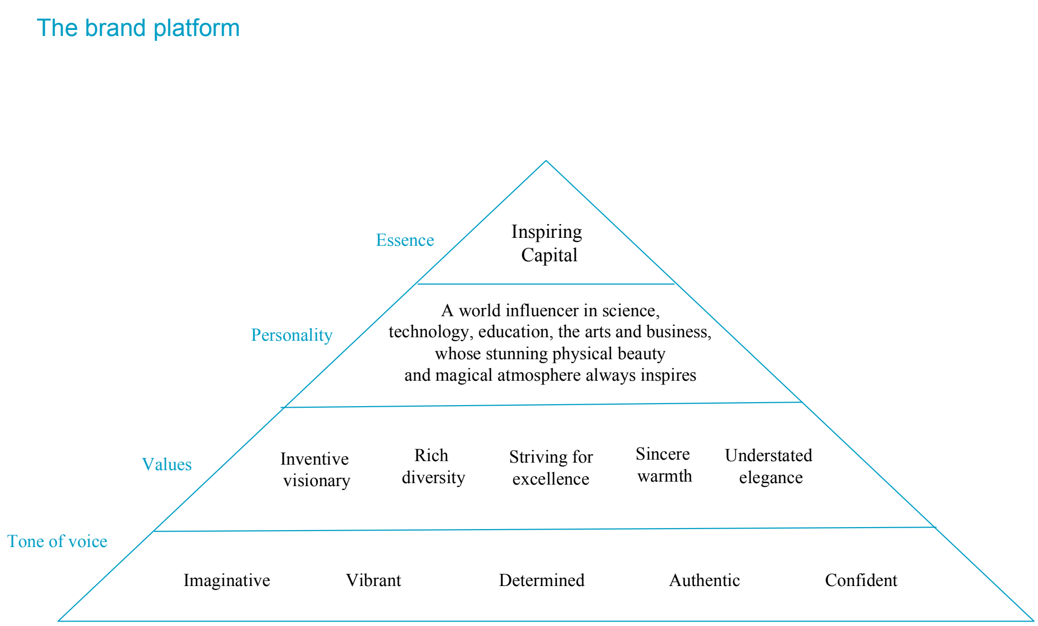


**Figure 11 - Edinburgh, Inspiring Capital Brand Pyramid [Source: Edinburgh Brand, 2006]**

From the brand essence – Inspiring Capital, to the Personality – A world influencer in science, technology, education, the arts and business, whose stunning physical beauty and magical atmosphere always inspires – right through to the values and tone of voice (see Figure 11) there is a perfect fit with the findings of the research leading into the moving image strategy.

At each level, the moving image strategy either already plays a key role, or has opportunities to do so. The Moving Image Strategy is well timed to fit in with the re-branding both as an element of inspiration and as a medium through which to convey other inspirational messages.

## 6.3 Public Screen Broadcasting (PSB)

Some of the moving image stakeholders were keen to investigate the opportunity of Edinburgh joining the Big Screen Initiative – Public Screen Broadcasting (PSB). By taking part as one of the next set of cities in the PSB network, Edinburgh can add to its exhibition opportunities, help attract a broader set of audiences for its moving image content and can raise the public profile of its moving image sector.

With the emergence of a new daylight digital video technology, the BBC became the catalyst of using this technology for live broadcasting of major events to the wider public. Before the PSB project started in Manchester in 2003, the BBC already broadcasted live from 10 temporarily installed screens in major cities during events such as the 2002 World Cup, the Manchester Commonwealth Games, the Queen's Golden Jubilee or other ceremonial and cultural events. The very success of these temporary screenings proved the popularity of public screening and that people like to gather together in public to share great moments of sport, cultural or political events.

PSB was initiated by BBC, which also provides programme content. Each screen has its own dedicated schedule created, implemented and monitored by a BBC screen manager located at the nearest BBC centre. Phillips supplies the digital screen technology and maintains the technology whereas the city councils are key content partner and responsible for the public space and legal issues (such as licensing).

As opposed to other big screens such as in shopping malls, the PSB does not rely on screen advertisements. Since June 2004, The Royal Bank of Scotland (RBS) has been a commercial sponsor and organisations such as Arts Council England are supporting the project as well as being a partner for local arts and media groups who contribute to the project with local video and interactive productions.

In each city other private partners are also involved in the project, such as the owners of The Triangle Shopping Centre in Exchange Square in Manchester. In Hull Henderson Global Investors/ Insight Investments, Hull Citycare, the Horncastle Group and EON media are the four sponsors for 2006. In this case the sponsors contribute £45,000, which is over one third of the annual cost of the screen. Leeds installed the screen with support from Yorkshire Forward and in Liverpool and Birmingham, RBS is the major sponsor.

The aims of the PSB initiative are to:

- Energise the hearts of cities by bringing together communities to share local, national and international events and broadcasts
- Develop a digital city centre meeting place
- Improve public awareness of local issues, developments, initiatives and activities
- Offer a hi-tech showcase for community and educational activities, and public service information
- Provide a high profile outlet for visual arts, digital innovation and local film-making
- Generally help urban regeneration by improving city centre environment

Currently there are five cities involved in the project:

- Birmingham – Chamberlain Square
- Hull – Victoria Square

- Leeds – Millennium Square
- Liverpool – Clayton Square
- Manchester – Exchange Square.

The BBC hopes that by spring 2007, five other cities will be part of the screening network. The 25 square metre screens show content from all BBC programmes and also reflect local life through a broad range of local content, including a "City Diary" listings service, local events and partnerships with community, arts & media organisations' (BBC).

The idea for the near future is that PSB will be enriched with interactive facilities enabling the audience to interact with each other via the screen.

The video content is accompanied by audio streaming (except at night-time when the sound is muted). Alongside the video runs it is possible for viewers to contribute comments and greetings by submitting text messages that appear in the text box. This technology also enables interactive games between the cities that are partners of the Big Screen network. Additionally, the screen shows an information ticker which runs along the base of the screen with news, sport and information.

The PSB screens are a public service project and operate on a not-for-profit basis. A consortium which generally includes Philips, the local authority and screen sponsors, finances the hardware and maintenance of the screen. The access to view the screen is always free and no commercial advertisements run on the screens.

The best locations for PSB screens are in the heart of cities and reach the best effect as part of city centre regeneration. Places with strong regular footfall and with sufficient space for larger numbers of people to gather for major events are ideal.

# 7 COMMUNITY INITIATIVES

## 7.1 Introduction

The community-focused agencies play an important role within the city's moving image sector. Moving image is pervasive within modern society – almost all citizens have access to moving image content through TV, cinema, games or mobile content. Access in this area is about using moving image to enhance the experiences of citizens, thereby helping them to gain literacy in the modern world and to express their own stories and experiences.

Many young people in particular can feel isolated and trapped within their own communities – often with seemingly few prospects and little by way of transferable skills. Moving image projects hold a special appeal for young people. Moving image based experiences are the most widespread and accessible cultural activities from the viewing perspective. And with the possible exception of football and sport, can form the basis of the most popular participatory activities too. Moving image is universally recognised, valued and can spark the imagination of some of the most disaffected individuals.

The links that the community sector organisations have with both the commercial production sector and with education establishments is important. While for most the experience of working with a community group are for experience, to gain transferable skills for employment and for social purposes, there are individuals that start within the community sector and progress to become professionals in the field.

It is important that there are routes for non-traditional students to make it to film schools, for example, to Screen Academy if they show sufficient skills and potential. It is also valuable for practitioners to work alongside community groups thereby passing on inspiring tips and also stimulating broader audiences for a wider range of moving image content.

## 7.2 Agencies and initiatives

The main agencies working within the community sector for moving image in Edinburgh are:

- Pilton Video
- Media Education Ltd
- Young People Speak Out
- Whale Arts Centre

### *7.2.1 Pilton Video*

Pilton Video started in the Pilton area of Edinburgh in 1982, and now works on a city-wide basis. Pilton Video is part of Arts and Learning, in Children and Families, City of Edinburgh Council, but raises the major percentage of its Programme costs through external finance – Scottish Arts Council, Scottish Screen, Broadcasters, charitable foundations and through commissioned productions from the voluntary sector. This allows for an additional number of freelance film-makers to be employed by Pilton Video on a project basis all year round. Pilton Video's core work is community-based adult learning and creativity, and this also involves engaging young people with Moving Image production as well as older people, women's groups, ethnic minorities, disabled and other marginalised groups.

Pilton Video's underlying premise is that people have stories to tell and that moving image is an effective and empowering means by which people can put their stories across. The organisation helps people to develop the production skills required in order to produce content of a high quality.

The types of productions that Pilton Video is involved with aim to be low-budget but high quality. In 2006, for example, they launched Street-wise – an innovative short film making scheme open to all film-makers in Edinburgh. Successful film teams gain access to the latest High Definition production and Avid editing equipment, as well as Technical and Production support, in Pilton Video's new facilities. Each of the four successful project teams also receives a small cash payment of £500 per production. Other commissioned projects with freelancers work with bigger budgets, but many community based projects are low-budget – facilitating creative freedom and self-expression for the participants.

Pilton Video has ongoing relationships with HE and FE. There is a two-way stream of students and film-makers – both moving on to college and also moving out of HE and FE to gain essential practical experience with Pilton Video in a well resourced practical production environment.

Pilton Video has successfully demonstrated that creative talent can come from the most unexpected places. For example, the short film, "Watching", which was completed at Pilton Video went on to win the Jim Poole Award for Best Scottish Short in 2005.

Since the closure of Edinburgh's media access organisation, Mediabase, Pilton Video has had an increasing number of requests and enquiries from local graduates looking to make their next step into production – these average around 20 enquiries per week. The organisation has identified latent demand for the provision of support to graduates who are not yet finding professional-level work. Pilton Video has opened an additional edit suite to absorb some of this demand. However, there are some concerns that a move into this type of provision would take Pilton Video away from its core remit of providing services to marginalised communities.

### *7.2.2 Media Education Ltd*

Media Education is a private training provider that works in the community sector using expressive arts and media methods to influence change.

Media Education works with partner organisations in a number of different ways:

- Producing audio-visual material for training and awareness
- Provides consultancy and support for community radio projects
- Uses video-based approaches for staff motivation and personal development programmes
- Uses creativity and media production in community projects
- Runs media literacy and education programmes for schools, youth and community groups

Media Education Ltd is a private limited company which carries out most of its activities through public sector contracts.

### *7.2.3 Young People Speak Out (YPSO)*

While the focus of Pilton Video is on filmmaking and the production of moving image content as an end product, Young People Speak Out (YPSO) has a slightly different emphasis. YPSO uses the media of film and television to help young people to explore and share issues that affect them on a social, emotional, spiritual, creative or political level. Like Pilton Video, YPSO is core funded through the City of Edinburgh Council Children and Families Department.

YPSO is a company limited by guarantee and has been operating in Edinburgh for around 10 years.

In addition to its main work, YPSO has secured lottery funding through which it has been able to support filmmaking projects that have been led by young people with professional crew involved in a supporting role.

### *7.2.4 Whale Arts Centre*

Whale Arts Centre supports access and training in a variety of arts disciplines. The centre has been in existence since 1992 and moved to a new purpose built premises in 2000.

Whale Art Centre’s work is not confined to moving image – but it is included here due to its relevant work, such as courses in digital photography and music. It is also notable for its links with the FE sector – there is a clear route from Whale to certificated courses at Stevenson College.

# 8 COMPETITIVE POSITIONING

## 8.1 Comparators

For each of the comparators there is a summary table containing the key information. This is followed by a textual discussion and further details. Where possible, similar data is presented for each city, but there are variations due to availability of sources.

### *8.1.1 Manchester*

| | |
|---|---|
| **Population** | 392,819 |
| **Working Population** | 267,464 |
| **Transport Infrastructure** | Manchester Airport with over 200 destinations and the most busiest outside London; M60 and M62 are main motorway arteries; frequent rail links to Liverpool and Leeds and to the South (Birmingham and London) |
| **Creative Industries Employment** | >18,000 |
| **Number of Creative Industries Businesses** | ~ 4,000 |
| **Key Buyers** | BBC and ITV |
| **Events and Festivals** | Commonwealth Film Festival; Kinofilm; ¡Viva! |
| **Education** | Media Training North West; Manchester Metropolitan University; Manchester University; Salford University and University of Central Lancashire |
| **Public Sector Support** | North West Vision Film and Video Production Fund; Manchester Film Office; NWDA; Regional Attraction Fund |
| **Public Investment** | NWDA promised £30m for the Manchester Media Enterprise Zone; From Apr 2003 – Mar 2004, North West Vision run two Lottery rounds distributing over £470,000 and a third round in 2004 with £85,000. North West Vision distributed £977,438 of Lottery funds between Jan 2003 and Dec 2005. |
| **Key Strengths in MI** | Presence of the major broadcasters; solid networking infrastructure with CIDS; Growing links between Manchester Metropolitan University and industry practitioners; BBC proposed move to Manchester and the associated Media Enterprise Zone initiative |

**Overview of Moving Image**

The moving image industries have a particular prominence in Manchester due to the fact that both BBC and ITV (Granada) both operate from the city. Unsurprisingly, the city's moving image sector is focused towards TV but there is also an important volume of animation production too.

The profile of Manchester's moving image sector has been boosted during 2005 and 2006 due to the BBC's proposed relocation of some of its staff, operations and commissioning departments to the city. In addition to the plans for the BBC's new Northern headquarters, the proposed development will support the moving image value chain located within a Media Enterprise Zone. This will provide mixed accommodation for a range of businesses and organisations positioned along the value chain – including production companies, new platform providers, education providers, business support agencies. It will also provide accommodation and support for fledgling businesses, established businesses and for freelancers all within one area of the city. At the time of writing this strategy, the BBC had not selected its final preferred site for the Media Enterprise Zone. Manchester City Council has committed funding and support for its Central Spine location in partnership with private sector investors and the North West Development Agency. Salford City Council and another joint venture private sector partnership have also lodged a competing bid.

**Studio Facilities**

Manchester is well-served for studios both for film and TV – a summary of studio provision in the North West region is provided in Appendix 8. The largest studio companies operating in the city is 3sixtymedia (annual sales of £15.5m in 2004). These studios were established by Granada TV and the BBC and are located in Quay Street – at the heart of the broadcasting cluster. The facility at 3sixtymedia provides three studios and one virtual studio. The sizes of the studios are 7,890sq ft, 5,288sq ft and 4,462sq ft.

Post-production is an essential part of the media industry infrastructure and a crucial factor in achieving scale. The fact that Manchester houses both Sumner's and 360 Media is a significant asset and a major attractor to inwardly investing companies.

**Production Companies**

The database from North West Vision includes 57 production and postproduction companies in Greater Manchester. Key companies operating in the production sector include:

- Cosgrove Hall Films
- HIT Animation
- Red Production Co.

Manchester has a special expertise in children's TV, led by its two most prestigious animation companies, Cosgrove Hall Films – which is widely known for works such as Little Robots, Fifi and the Flowertots and Postman Pat and HIT Animation ('Bob the Builder' and 'Rubbadubbers'). Cosgrove Hall reported sales of **£5.**1 million for the year ended December 2005 and HIT Animation reported sales of £7.2 million in 2004.

One of the biggest independent production companies, Red Production Co. Ltd. was established in 1998 and works for all major broadcasters such as BBC, ITV and Channel 4.

The company reported sales of £2.4 million for 2004 and has had commercial successes with productions such as ‘Queer As Folk’,‘Clocking Off’, ‘Bob & Rose’, ‘Linda Green’, ‘Dead Man Weds’, ‘Casanova’ or ‘Jane Hall’s Big Bad Bus Ride.

The North West Vision’s Manchester Film Office recorded a 29% increase in filming activities in the first half of 2005 compared to the same time one year before.

**Access to Buyers**

Manchester is home to two major broadcasters: BBC and Granada Television. The location of these big players stimulates the local production sector and provides access for new talent to start their businesses.

**Events and Festivals**

The Commonwealth Film Festival was established as part of the cultural programme for the XVII Commonwealth Games in 2002. The10 day long international festival aims to display the film production talent of Commonwealth Countries to a wider public.

The Commonwealth Film Association, which organises the festival, also runs a year-round programme with screenings and film related special talks and master classes.

The festival uses a number of venues including the art-house cinema venue, Cornerhouse, AMC Cinemas and the performance venue, Greenroom.

Funders of the festival are Manchester City Council, NWDA, North West Vision, UK Film Council, Arts Council, Marketing Manchester, the Association of Greater Manchester Authorities and the Commonwealth Foundation. Headline sponsors are Manchester Science Park, Addleshaw Goddard and the Community Loan Fund for the North West.

Since 1996, Manchester has been host to Kinofilm, a festival for new international short film productions. The festival combines films made locally, nationally and across Europe within its various strands.

For 2006, the strands were ‘Outside In’ (underground, independent and counter culture filmmakers), ‘4 Countries 1 Cinema’ (UK and Ireland), ‘Euro Cine’ (new cinema from all over Europe), ‘Kino Tales’ (themed programmes), ‘North by NorthWest’ (films from England’s North) and ‘Bluefire’ (black and Asian filmmakers).

The festival is organised by Kinofilm and lasts for ten days, again using venues including Greenroom, AMC cinemas and Cornerhouse. Funding for the festival is provided by the UK film council, North West Vision, Arts Council, Association of Greater Manchester Authorities, Manchester City Council and the National Lottery. In 2006, the festival’s headline sponsor was the production company, Baby Cow, which has a Manchester presence. Additional private sector sponsorship was provided from Parcel Force worldwide and AMC cinemas.

Cornerhouse also runs a number of festivals with a thematic or geographical theme. For example, ¡Viva! focuses on films from Spain and Latin America. It runs over 10 days and displays short films, features and documentaries and was established 1994. The main supporters of the festival are San Miguel, Institute Cervantes Manchester, Monarch airline, Journey Latin America, Europa Cinemas and various public film agencies from Spain and Latin America.

**Education**

Media Training North West offers different training solutions for freelancers, media companies and employees in the North West. Funded by agencies such as Skillset, NWDA and Film Council, Media Training North West constantly gathers information about skills shortages and develops programmes to help professionals to bridge their knowledge gaps.

The Manchester Metropolitan University (MMU) offers a wide range of HE courses in audiovisual industries. Examples are Computer Games Technology (BSc Hons), Media Technology (BSc Hons), Illustration and Animation (BA Hons) or a MA in Visual Culture. In addition there is a strong team of researchers carrying out research in Film and Media at the department of interdisciplinary studies.

Manchester University has a strong Media Studies element within its Sociology department. However, this is largely theoretically-based and there are no strong links with the moving image industries at this point.

Salford University and the University of Central Lancashire (in nearby Preston) are home to the main relevant HE provisions of direct relevance for the moving image industries.

**Cluster**

Manchester's Northern Quarter has been regenerated into a creative quarter with strong involvement from arts and creative industries practitioners and entrepreneurs. It hosts many independent fashion retailers as well as landmarks such as the Chinese Arts Centre and the sector support agency CIDS.

Quay Street is the site of Granada TV and 3sixtymedia at the edge of the city centre and creates a cluster of audiovisual and broadcasting related businesses.

**Public sector support of Moving Image**

North West Vision is the main provider of public sector support of moving image strategies. It coordinates national and regional government funds as well as film support scheme from the national lottery fund. Through its Manchester Film Office, North West Vision also offers a one-stop agency that deals with any kind of enquiries from moving image industries professionals and supports them in their production activities.

Delivered by North West Vision and funded by the NWDA, the Regional Attraction Fund is a major initiative to attract high-growth independent producers to England's Northwest and to help grow existing production and facilities companies in the region.

The first £1 million phase of the fund will offer a collection of incentives, business support and programme development investment to companies with ambitious, market-driven strategies for growth. Packages of support are available in the range of £3,000 to £60,000 backed up with advice, mentoring and contacts.

In addition to its primary aim of stimulating growth within the sector based on financial aid, the press coverage surrounding the Regional Attraction Fund is such that it has also helped to raise the profile of the North West as a credible centre for media production.

**Key Lessons for Edinburgh:**

Although Manchester has a similar number of production companies to Edinburgh, the perception is of the city as a prominent base for out of London production. The main basis for this perception is the presence of the major broadcasters in the city. The city has also benefited from having been designated within the EU Objective 2 area for the receipt of Structural funds – some of which has helped to support the development of the creative industries cluster – and Enterprise Zone funding has been available to Salford and Trafford.

However, while attracting a broadcaster may not be an option for Edinburgh in the short term, there are other aspects of the Manchester moving image scene that can be borrowed. These include:

- A solid networking infrastructure for small businesses through Creative Industries Development Service (CIDS) and other forums
- North West Vision's commitment to supporting production companies that want to locate in the region through the Regional Attraction Fund
- Growing links between Manchester Metropolitan University and industry practitioners
- Using the big screen initiative to promote awareness of the city to broaden involvement in cultural events
- Support in the development of geographic clustering for media and technology companies through the Media Enterprise Zone initiative

### 8.1.2 Liverpool

| | |
|---|---|
| **Population** | 439,473 |
| **Working Population** | 286,800 |
| **Transport Infrastructure** | Second largest harbour in the UK; international airport; mainline train services to Manchester and to cities at the eastern coast of the North of England as well as to the South |
| **Creative Industries Employment** | 24,008 (whole Merseyside area) |
| **Number of Creative Industries Businesses** | 35 production companies |
| **Key Buyers** | FACT has been a major buyer leading up to 2008 City of Culture but there are no major broadcasters based in the city |
| **Events and Festivals** | Liverpool Film Festival; Outsiders |
| **Education** | International Centres for Digital Content; Liverpool John Moores University; University of Liverpool; FACT |
| **Public Sector Support** | Liverpool Film Office; Merseyside Film and Television Fund (Objective 1 funded); North West Vision (Lottery awards); NWDA |
| **Public Investment** | NWDA: £2.5 million for restoration of Bluecoat; World Museum Liverpool £1.9 million; FACT is a £10 million property development funded by various public sector organisations; North West Vision run two Lottery rounds distributing over £470,000 and a third round in 2004 with £85,000. North West Vision distributed £977,438 of Lottery funds between Jan 2003 and Dec 2005. Merseyside has been one of only 3 EU Objective 1 areas in England and as such has had access to substantial funding for regeneration. |
| **Key Strengths in MI** | The Ropewalks development; FACT; digital media and technology cluster |

**Overview of Moving Image**

The moving image sector in Liverpool is strong – it has had a significant influence on the changing image of the city as a major tourist destination with a vibrant cultural life.

Liverpool is home of the UK's newest centre for film and creative technology, the Foundation for Art & Creative Technology - FACT. FACT is based in the first purpose-built cultural building in Liverpool for over sixty years and was launched as a central element of Liverpool - European Capital of Culture. There are high hopes in the city that Liverpool's successful bid to become the European Capital of Culture in 2008 will have a strong economic impact on the moving image industries.

The creative industries sector in the North West accounts for 12% GVA compared to an estimate for the creative industries sector nationally accounting for 10%. According to Mersey Partnership, the creative industries sector creates £485m in revenues to Merseyside alone.[39]

### Studio Facilities

UK Film Council database includes three studio facilities in Liverpool. One of the larger independent studio facilities – the Liverpool Film Studios - is run by Liverpool City Council and provides three studios (8,193sq ft, 8,195sq ft and 5,484sq ft) and two workshops (2,438sq ft and 2,174sq ft).

### Production Companies

North West Vision lists 35 production and post production companies that have their business in Liverpool and Greater Merseyside.

According to the Liverpool Film Office, the value of production activities has increased from £1 million in 1989 to £12 million in 2000 and in 2005, Liverpool Film Office registered 632 days of film shooting.

Some recent productions to come out of Liverpool include the feature film 'Beyond Friendship' in which Liverpool doubled as New York in the 1940s. Mersey TV is probably the most prominent Liverpool-based independent production company (with around 400 staff and annual turnover of £41.4 million reported for 2005[40]). It has been responsible for long-running dramas such as "Grange Hill" and "Hollyoaks" and was sold to All3Media in 2005.

Apart from growing production activities, Liverpool also has strong reputation for games software. According to Skillset, the local games industry accounts for around three quarters of the sector's workforce in England's North West.

### Access to Buyers

Liverpool is in a similar position to Edinburgh in the sense that the major broadcasters/buyers are located in rival city, Manchester.

### Events and Festivals

Liverpool Film Festival, was established in 2004, and is organised on a not for profit basis. The festival consists of six different sections: features, shorts, animation, young filmmakers, master classes & workshops and the competition. The festival runs for three days across various venues. The festival is supported by Liverpool 2008.

[39] http://www.investmerseyside.com/

[40] Dun and Bradstreet

Liverpool also hosts, Outsiders, a Gay and Lesbian Film Festival, established in 2004 and operated through a registered charity. The festival is funded by Northwestvision, Lloyds TSB Foundation, Homotopia and Liverpool 2008. The festival showcases every month one film with screenings taking place at FACT and Liverpool Philharmonic Hall.

**Education**

Liverpool hosts the only International Centre for Digital Content of its kind in the UK. ICDC is a collaboration between Mersey TV and the Liverpool John Moores University (LJMU). The centre is involved in research on innovative content solutions for Interactive TV, mobile, wireless, Bluetooth and GPS with different target markets such as tourism, e-learning and games.

The centre also runs a business incubation facility (DigitalINC), providing workspace for 14 start-ups who work in a variety of digital media including animation, graphic design, games development and mobile applications.

The University of Liverpool offers an undergraduate degree in European Film Studies and Modern Languages. The modules of the course include European languages, history, culture, politics and literature and introduce students to film language and European cinema.

FACT offers courses to local people who usually don't have access to new digital and media related arts forms and brings them together with media artists who provide workshops.

**Cluster**

Liverpool's creative quarter, Ropewalks, is located in the city centre. The Ropewalks were part of an integrated urban redevelopment with new buildings such as FACT, the Tea Factory and Vanilla Factory. There are also managed workspaces such as the Palace or the Arena Artist's Studios or the Masque. Parr Street recording studios are also located in the creative quarter.
This area has been heavily redeveloped using NWDA and Objective 1 European funding and has transformed previously derelict and semi-derelict listed buildings which are now occupied by artists, club venues, independent retailers, music studios and office space predominately used by creative businesses.

**Public sector support of Moving Image**

Apart from national public sector support schemes and tax incentives for the moving image industries, Liverpool offers basically two local supports schemes for the audio visual industries:

In 1989, Liverpool City Council established its Film Office. As a one stop service point, it aims to support local film makers and promote Liverpool to national and international producers and film directors.

The Merseyside Film and Television Fund supports companies based in the region or that have a joint venture with a company in Merseyside. The fund is provided by 'North West Vision' and is available for facilities and production services companies working in film, television and digital media. The fund can support proposals by up to 37% of agreed costs.

**Key Lessons for Edinburgh**

There are some comparisons to be drawn between the Manchester-Liverpool distinction and that of Edinburgh with Glasgow. Like Edinburgh, Liverpool suffers from a lack of a major broadcaster or buyer located within the city and like Edinburgh, Liverpool has a less established production sector compared to its rival.

However, Liverpool has drawn on its strengths and set about establishing itself as a credible centre for moving image. The Ropewalks development and, in particular, FACT are central to the city's reputation in this area and the cluster's "digital media and technology" focus provide a useful (and future-proof) differentiation from Manchester, which is more focused around traditional broadcasting.

Unlike Edinburgh, Liverpool has benefited from EU Objective 1 funding and has had Enterprise Zone status (Speke).

### *8.1.3 Newcastle/Gateshead*

| | |
|---|---|
| **Population** | 191,300 in Gateshead and around 269,500 in Newcastle |
| **Working Population** | 116,900 (Gateshead) and 174,200 (Newcastle) |
| **Transport Infrastructure** | International airport; east coastal rail network with frequent links to Edinburgh, London and the metropolitan areas in the North West |
| **Creative Industries Employment** | ~ 3,500 (audiovisual industries) |
| **Number of Creative Industries Businesses** | ~ 2,800 (figure for whole North East) |
| **Key Buyers** | Tyne Tees Television (ITV) and the BBC |
| **Events and Festivals** | Northern Lights Film Festival; Animex (in Middlesborough) |
| **Education** | University of Newcastle, University of Teesside, Tyne Tees TV; |
| **Public Sector Support** | Northern Film and Media; DigitalCity; One NorthEast |
| **Public Investment** | Northern Film and Media; One NorthEast; Objective 2; Newcastle City Council; Gateshead City Council |
| **Key Strengths in MI** | Large-scale regeneration programmes that include creation of focal points through key cultural buildings and associated public open space (the Sage and the Life Centre). Availability of Enterprise Zone and EU Objective 2 funding to help support large scale regeneration. Involvement in new types of festival and community activities. Commitment to partnership working – Newcastle-Gateshead and across the North East. Positive thinking – maintaining the energy behind the City of Culture bid through the Culture 10 initiative even after an unsuccessful result. Development of the cultural quarter in the city. |

**Overview of Moving Image**

All businesses in the moving image sector in the North East contribute £121 million a year to the regional economy which represents 0.8% of the UK's total revenue generated through moving image related business activities although 1.3% of the national moving image workforce is based in the region. Within this same report, Skillset identified future growth potential for the audiovisual industries in the region.

According to the Skillset census 2004[41] there are 3,500 people working in the audiovisual industries in the North East and production activities contributed £8.5 million to the regional economy in 2004. The interactive media sector employs 1,140 people in the web and internet sub sector, 560 in offline multimedia and 470 in electronic games industries.

Newcastle and Gateshead have only recently emerged as a centre for moving images in England's North East after intensive investments from the government in conjunction with regional regeneration activities.

**Production Companies**

Although the production market in the North East is fairly small, there are some well established independent production companies in the region, such as Amber Films, A19, Film Nova, Coastal Productions, Ipso Facto and Yipp Films. Key recent productions in the North East have included 55 Degrees North, Distant Shores, Steel River Blues, Lawless and Wire in the Blood.

The interactive media sector is also growing in the North East. In particular, there is a strong fledgling digital media/technology sector emerging in DigitalCity in Middlesbrough. This has been stimulated through the University of Teesside games, virtual reality and interactive media graduates and through the DigitalCity economic development initiative. DigitalCity is a joint project supported by the University of Teesside, Middlesbrough Council and One NorthEast.

The North East has been nurturing expertise in e-learning – both in Newcastle/Gateshead and across the wider region. Activities relating to this include the planned Business Learning Portal – a collaborative private sector initiative to build a platform for blended learning for SMEs.

**Access to Buyers**

The major buyers of television content, based in the North East are Tyne Tees Television (ITV) and the BBC.

Tyne Tees has recently invested £6 million in a new premises in Gateshead plus a news-gathering base at Billingham. These new premises are kitted out with the latest post production and graphics technology as well as state of the art satellite links for the newsroom (replacing the microwave links). These sites use digital equipment and studios. The equipment in the newsroom is such that journalists, directors and other programme makers now edit their own reports and packages. The new premises also houses SignPost – a unit specialising in the provision of subtitled programmes for ITV and other broadcasters.

In line with a recent change in Ofcom's licence conditions ITV reduced its off-peak regional programme production in 2005 – resulting in a number of job losses. However, in its annual

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[41] Skillset, *Skillset Census Report, 2004*

statement for 2006[42], the Broadcaster committed to commission local independent production companies to deliver in excess of the required 25% of non news content in 2006. The budget for regional operation in 2005 was over £10 million.

While production centres on news, Tyne Tees also produces current affairs programmes, it has a specialist unit devoted to the production of archive programmes (including the franchise for Channel 4's "100 Greatest…").

Tyne Tees TV works with the regional screen agency, Northern Film and Media, on initiatives such as ITV Regional Production Fund and Hothouse, a competition which selected four one off half-hour programmes for Tyne Tees (with budgets of under £18,000).

**Events and Festivals**

One of the major regional film festivals is the Northern Lights Film Festival, which focuses on moving image from UK, the Baltic and Northern Europe. The first festival was launched in September 2003 as a joint venture between Tyneside Cinema and Yipp Films. The festival programme offers film screenings, master classes in scriptwriting, editing, an animation tour and a school's filmmaking project.

The festival also hosts a summit where people from the film community can meet, network and learn from each other.

The festival ends with a gala where £5,000 is awarded to the overall winner. Funders of the festival include the EU Media programme, Northern Film & Media and its stakeholders, the city councils of Newcastle, Gateshead and Middlesbrough as well as private sponsors like DFDS seaways, GNER and the living room.

Animex – International Festival of animation and computer games is already in its seventh year. The festival, which takes place in Middlesbrough each February and consists of two main activities: Animex Screen, a one week screening programme presenting specially curated films for the festival and Animex Game, a workshop programme with leading creators and creative directors of animation and game products.

The festival culminates in Animex Talk, which includes seminar sessions and an awards ceremony - Animex Student Animation Awards. The festival is organised by the School of Computing at the University Teesside, funded by Northern Film & Media and other public support agencies as well as private sponsors such as 3D Palace, Seed animation Studio, imagine or Sub TV. Animex attracts global participation.

[42] Tyne Tees Television, *Annual Programme Statement 2006*

**Education**

The University of Teesside is the regional hub for digital media and technology education. Its links with the DigitalCity economic development project are key to stimulating and supporting the growth of the digital media/technology cluster in the North East.

Tyne Tees TV has formed strong links with local schools. For example, their weather presenter, Bob Johnson, undertakes outreach work with local schools – raising awareness of weather forecasting and the environment. The broadcaster also has links with the region's universities and colleges through which it promotes better understanding of TV – particularly amongst media students.

**Cultural**

Newcastle/Gateshead has recently made a number of cultural investments that have played a key role in transforming the post-industrial river-side and in place-making regeneration. These include, The Baltic Centre, The Life Centre and Tyneside cinema.

**Public sector support of Moving Image**

Northern Film and Media is the Regional Screen Agency in England's North East. It aims to encourage more people in the region to make, watch and work in film, TV and interactive media and to support the moving image industries' regional growth. Northern Film and Media provides lottery funds for skills development, company development and supports network activities, audience development and stimulates the development of creative content. Northern Film and Media is funded by OneNorthEast, UK film council, the European Union and Skillset.

DigitalCity is an initiative to support digital innovation in the region. Sectors of interest for the innovation programme include animation development and production; game design and software production; visual and digital special effects; virtual reality; scientific, technical and medical visualisation; digital arts; and convergent media.

**Key Lessons for Edinburgh**

The North East region has embraced culture within its regeneration and economic development remit. It should be clear that the cities of Newcastle and Gateshead have access to more European funding as areas of deprivation – through their Enterprise Zone status and through EU Objective 2. However, there are still lessons to be learned.

For example, the festivals that take place in the region have a strong focus on digital media/technology rather than on legacy moving image technologies. Edinburgh would be well advised to ensure the same is true of its festivals.

The cities have created focal points in some of the previously less desirable areas through its location of key cultural buildings and associated public open space – this is true of both the Sage and the Life Centre. This again could provide a pointer for developments in Edinburgh.

### *8.1.4 Rotterdam*

| | |
|---|---|
| **Population** | ~ 600,000 |
| **Working Population** | 261,000 (2003)[43] |
| **Transport Infrastructure** | Largest harbour in the world, close proximity to Schiphol airport and train and motorway networks to other metropolitan centres in the Netherlands and central Europe |
| **Creative Industries Employment** | 13,340 (culture and other services)[44] |
| **Number of Creative Industries Businesses** | 262 (audiovisual industries) |
| **Key Buyers** | No major buyers in the city but good access to Hilversum and Amsterdam |
| **Events and Festivals** | International Film Festival in Rotterdam |
| **Education** | SAE Institute |
| **Public Sector Support** | The Rotterdam Film Fund & Commission; Netherland's Film Budget; film commissioner working for the City Council; |
| **Public Investment** | Rotterdam City Council; Netherlands Film Budget |
| **Key Strengths in MI** | The commitment of the City Council who identified the MI sectors as one of the sectors with the highest growth potential for the local economy |

**Overview of Moving Image**

Rotterdam does not have a tradition in filmmaking. However, the city has undertaken to develop a reputation as a major hotspot for the audiovisual industries in the Netherlands as part of its regeneration agenda. Rotterdam City Council is leading this development and has taken a number of steps towards achieving this agenda.

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43 http://cos.rotterdam.nl/Rotterdam/Openbaar/Diensten/COS/Publicaties/PDF/KC2005UK.pdf, page 17.

44 http://cos.rotterdam.nl/Rotterdam/Openbaar/Diensten/COS/Publicaties/PDF/KC2005UK.pdf, page 15.

The total production costs for feature films shot in the Netherlands in 2004 were EUR61.2 million. According to Rotterdam City Council, 262 companies and 602 people worked in the audiovisual industries in Rotterdam in 2003.

The Rotterdam Film Fund provides loans and facilities support drawing from the Netherland's Film Budget.

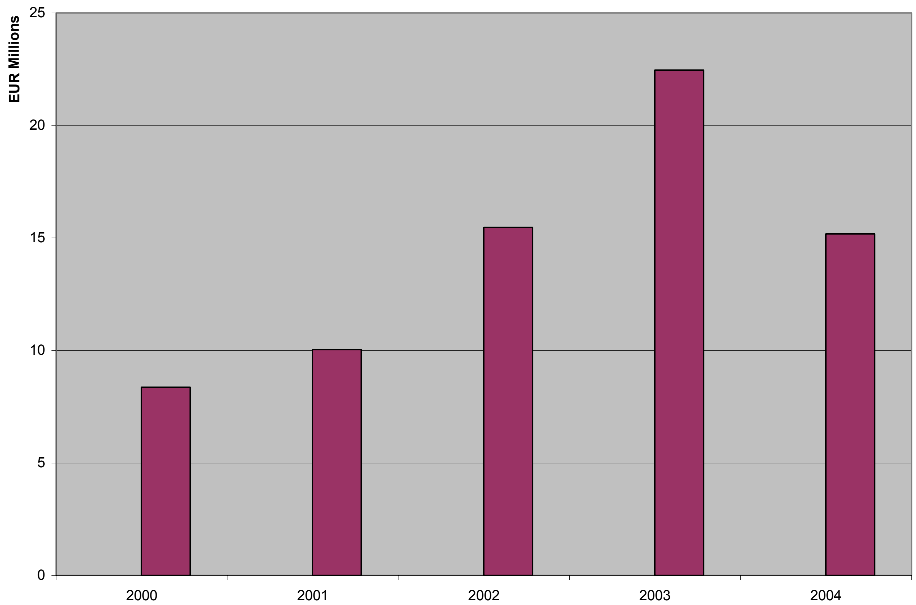


**Figure 12 - Netherlands Film Fund Budget**

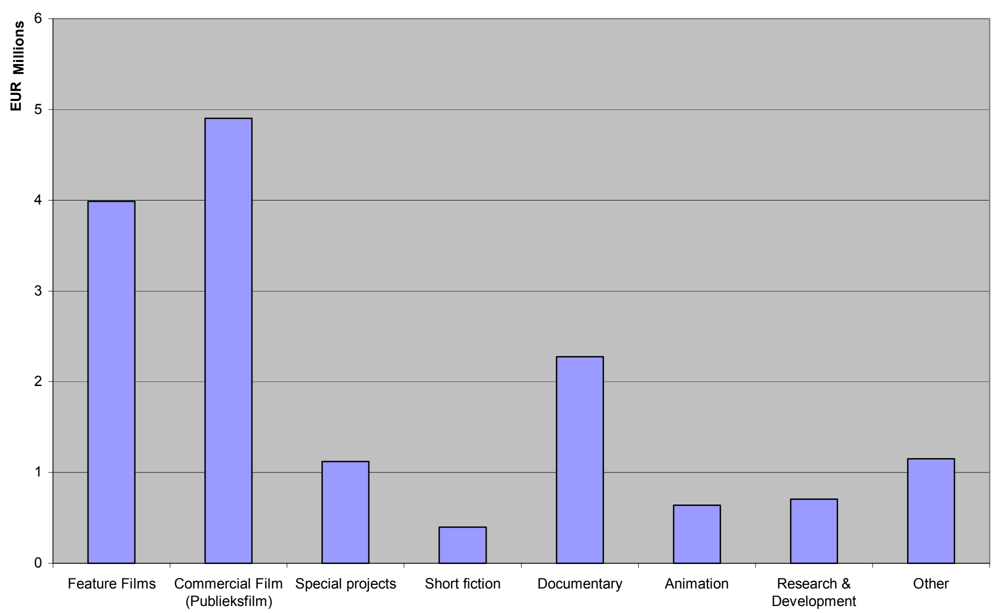


**Figure 13 - Allocation of Netherlands Film Fund Budget, 2004**

The appointment of a film commissioner working for Rotterdam City Council underpins the ambitious plans. Rotterdam is the only Dutch city with a film commissioner, The commissioner is responsible for the development of a sustainable local film industry that now employs a few hundred people.

**Production companies**

Rotterdam has the second most production companies after Amsterdam. The Dutch Film database provides details of 27 companies. The games industry is also represented, most prominently by Mystic Game Development, which was founded in 1999 in Rotterdam and is a prominent player in real-time character animation.

**Access to Buyers**

The majority of the Netherlands' broadcasting activities take place in Hilversum, while Amsterdam is the main centre for film distribution. There are no significant buyers present in Rotterdam itself at present but the city is well positioned for access to both Hilversum and Amsterdam.

**Festivals**

The International Film Festival in Rotterdam (IFFR), founded in 1971, takes place every year in January and is one of the first major international film festivals in the annual international film festival calendar. Its programme includes features, short films, documentaries, videos, new media content, online cinema and installations. The IFFR festival includes the sections 'Hubert Bals Fund' (supporting filmmakers in southern and developing countries) and the 'CineMart', co-production market for film projects. Major sponsors of the festival were Tiscali, Robeco, De Volkskrant and VPro.

**Education**

SAE Institute is one of the largest international networks of colleges specialised in media technology training. It has two schools in the Netherlands, one in Amsterdam and one in Rotterdam. The institute offers four areas of study: Audio, Digital Film, Multimedia and 3-D Animation in three different levels – certificate, diploma and Bachelor of Arts degree.

**Cluster**

Rotterdam's audiovisual industries cluster is concentrated in the Lloydquarter. It is the area of the riverbank of the river Maas and is located on the edge of the inner city. The redevelopment of the site started in 1996 and was divided in four stages. The first stage consisted of the reconstruction of the turbine hall of the Schiecentrale into two studios. Together with the battery house that was transformed into a modern business building, Schiecentrale locates about 65 firms and artists, which employ about 250 to 350 people.

**Public sector support of Moving Image**

The Rotterdam Film Fund & Commission was established to support the growth of the audiovisual industries in Rotterdam. It aims to stimulate and strengthen the industry in the region by providing financial support through interest free loans for locally produced or partly produced feature films, documentaries and TV dramas.

The commission section offers free assistance with locations, facilities, local crew and permits. The success of the agency in figures is visible: in 2001, Rotterdam experienced 151 shooting days that rose to 772 days in 2004.

**Lessons for Edinburgh**

Rotterdam has developed the semblance of a moving image sector from a starting point of very little. This approach has required significant commitment and investment from the public sector. The longer term benefits and impact have yet to be seen – but certainly moving image has played an important role in the regeneration of the city.

Similarly to Liverpool, but potentially also drawing a parallel with Edinburgh's development – the successful redevelopment of a former industrial areas of the city have been central to the moving image strategy.

#### 8.1.5 Cologne

| | |
|---|---|
| **Population** | ~ 1 million |
| **Working Population** | 439,882 |
| **Transport Infrastructure** | excellent high-speed train infrastructure; Bonn-Cologne airport is the busiest one in terms of low cost carriers; major motorway routs |
| **Creative Industries Employment** | 14,000 (audiovisual industries sector) |
| **Number of Creative Industries Businesses** | 825 film production companies |
| **Key Buyers** | Westdeutscher Rundfunk; RTL; Vox; SuperRTL; Magic Media Company |
| **Events and Festivals** | Cologne Conference; Feminale; Short Cuts Cologne; Deutscher Filmpreis; Deutsche Kamerapreis |
| **Education** | Academy of Media Arts; International Film School of Cologne; Macromedia GmbH – Academy of New Media; University of Applied Sciences Cologne; University of Cologne |
| **Public Sector Support** | Film Foundation North Rhine-Westphalia; Film Foundation Cologne; Westdeutscher Rundfunk; Cultural and Media Affairs (EU Media programme) |
| **Public Investment** | Film Foundation NRW figures for 2005 in €[45]: 17.7m film production; 7.1m TV production; 487,000 post production; 2.2m low budget projects; 281,500 short film production; 274,500 for film festivals; 3.3m film distribution; 460,000 script writing; 190,000 production prep; |
| **Key Strengths in MI** | Cologne is largest centre for TV production in Germany and third largest for film production; access to skills |

**Overview of Moving Image**

Cologne is an important region for broadcasting and radio in Germany. According to a study of the Hans-Bredow-Institute at the University Hamburg, the total national workforce in TV and radio accounted for 46,000 employees [46]. 18.41% of them work in Cologne. The national value of production of television and radio in 2004 accounted for EUR14.9bn[47].

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[45] http://www.filmstiftung.de/fist/download_pdf/diverses/zahlen2005.pdf

[46] Employment numbers must be treated cautiously as they do not include freelancers. Official statistics only exist for employees who are subject to social insurance contribution

[47] Hans-Bredow-Institut fuer Medienforschung an der Universitaet Hamburg (2005) *Beschaeftigte und wirtschaftliche Lage des Rundfunks in Deutschland 2003/2004*

According to a study from the German Institute for Economic Research on film and television industries in Germany, the region of Cologne[48] hosts 825 film production companies. This makes the region the third largest centre for production in Germany after Munich and Berlin and the largest centre for TV production in Germany, given that 343 of the region's 825 production companies concentrate on TV production. Major TV production companies based in Cologne include Westdeutscher Rundfunk, RTL, Vox and SuperRTL. In 2004, the WDR made a profit of EUR28.5m and the revenue of RTL in 2004 accounts for EUR1.8bn, which also includes RTL's subsidiaries VOX, RTL2 and SuperRTL[49].

**Studio Facilities**

The larger production companies in Cologne tend to have their own studio facilities that are not available on a formal basis to other companies.

Magic Media Company (MMC) runs 38 TV and film studios with a total size of 450,000sqm. Shareholders of the company are RTL, ProSiebenSat1 and two public-private companies. Recent major production includes "Amelie". Germany's version of 'Who wants to be a millionaire' is also produced in one of the larger MMC studios.

**Production Companies**

The Cologne region (including the district of Düsseldorf) hosts 825[50] production companies. The mercantile directory of Cologne includes 513 film production companies.

In 2002, the Cologne City Council issued film-shooting authorisations for in total 1,200 days. The film production value in 2000 accounts for around EUR450 million.
Examples of successful feature films shot in Cologne are "Das Wunder von Bern", "Barfuss", "Manderlay". But also TV entertainment and factual shows such as 'Who wants to be a Millionaire' or 'Big Brother' as well as comedy shows like '7 Tage 7 Koepfe' are produced in Cologne.

**Access to Buyers**

The film production industries profits directly from commissioning work for public and private broadcasters that have their head offices in Cologne. The strong cluster of broadcasters in Cologne attracts independent productions companies to locate their business in the region. International producers such as Endemol and Granada have their German branch in Cologne as well as special effect production companies such as Actionconcept that

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[48] In the study, the region of Cologne is defined by the districts of Cologne and Düsseldorf

[49] [49] Deutsches Institut fuer Wirtschaftsforschung (2002) *Film und Fernsehwirtschaft in Deutschland 2000/2001*

[50] http://branchenbuch.opusforum.org/branchen/1QQRhein-RuhrQQNordrhein-WestfalenQQ51QQK%F6lnQQ4060QQFilmproduktionsunternehmen+und+Filmproduzenten

produced “Alarm fuer Cobra 11” one of the most successful TV action series in Germany (commissioned by RTL).

**Events and Festivals**

Cologne host various festivals of relevance to the moving image sector.

Cologne Conference is an event for professionals of broadcasting and independent production companies. Since 1991, it has been organised by the public agency ‘Landesanstalt für Medien’ and supported by the government of North Rhine-Westfalia and the Cologne City Council. In 2005, the conference attracted about 6,000 international participants.

The main sponsor of this event is the German news magazine SPIEGEL.

The conference includes film competitions in fiction, non-fiction, newcomers and music videos. Additional screenings celebrate famous cult films and respected professionals in the retrospective section.

Feminale has been operating as a biennial film festival for films made by female directors and producers since 1984. The festival is organised by the registered charity ‘Feminale e. V.’

Additional sponsors include The Film Foundation of North Rhine-Westphalia, the Cultural Department of the City of Cologne, the Federal Ministry for Families, Seniors, Women and Youths, the Federal Foreign Office, as well as the British Council and Institut Français.

Short Cuts Cologne is an annual short film festival organised by ‘Koelner-Filmhaus e. v.’ – a registered charity. The festival, which showcases short films is in its ninth year. The last festival in 2005 included 140 films from which 51 took part in the international competition. The festival also celebrates young regional filmmakers and has a special focus on films from Belgium.

Festival venues include ‘Filmhaus Kino Koeln’, ‘Filmpalette’ and ‘Kino im Museum Ludwig’.

Funders of the festival are the Media programme of the European Union, Sparkassen Foundation Cologne, Film Foundation Cologne, the WDR and several local private companies.

Cologne also hosts media galas such as the national broadcasting prize ‘Deutscher Filmpreis’ and the ‘Deutsche Kamerapreis’ that is awarded for work behind the camera. Although not of international importance, both awards have a high national reputation and the galas are broadcasted live on national television.

**Education**

The moving image industries benefit from Cologne’s broad educational base. Various FE and HE institutions offer courses for future work in the audiovisual industries sector.

The Academy of Media Arts has run a study programme in audiovisual media since 1990. Currently three different kinds of courses are available: a further education programme (two years), an undergraduate programme (four years) and a postgraduate programme (two years).

The Academy has close connections with the leading German film academy 'Konrad Wolf' in Potsdam. Students can choose between four main areas: film/television, media design, media art and art and media studies. The Academy offers courses in interactive film, robotics, computer games and network applications.

The International Film School of Cologne offers a higher education programme in film studies (Bachelor of Arts) that includes screenwriting, film directing, creative producing, and sound design/film. The school also offers both undergraduate and further education modules in costume, make-up, set design, animation, acting and media design. The Film School has close associations with the Film Foundation North Rhine-Westphalia and focuses on professional education and talent development.

Macromedia GmbH – Academy of New Media is a private school that offers both FE and HE. Students have the opportunity to gain a bachelor degree in 'TV production', 'PR/communication management', 'media, sport and event management', 'film and television' and finally 'digital media design'. The academy co-operates with the University of Bradford.

The University of Applied Sciences Cologne provides a course in media management that educates students in the operational management within media and moving image related industries.

The department of media management at the University of Cologne does research in the field of digital broadcasting and digital radio. The University also offers both media informatics and cultural media sciences programmes.

**Cluster**

Cologne's designated media zone is the MediaPark Cologne on the site of a former goods station. As a top-down regeneration project, it combines living, work and leisure in an area spread over 20 hectares.

**Public sector support of Moving Image**

Due to the federal structure of Germany, public support of moving image industries is in the responsibility of the federal states. North Rhine-Westphalia's support agency is the Film Foundation North Rhine-Westphalia. It is a public-private partnership between the federal state, the broadcasters WDR, ZDF and RTL and the Landesanstalt fuer Medien (the public licensing authority). The annual budget of about EUR36 million is distributed to authors, producers, directors, film distributors and cinema operators for high-budget and low-budget productions, national TV productions and international film co-productions. For every Euro given by the Film Foundation NRW, the producers must invest 1.50 in North Rhine-Westphalia.

Aside from financial support, the agency also provides support services such as a database of film locations in the region and contact lists of regional companies that provide services for film productions.

**Lessons for Edinburgh**

The main lessons for Edinburgh arising from the investigation of Cologne are to aim to develop the educational framework across a broad base and to develop the festivals for the future.

The education institutions in Cologne are well connected into the moving image industries and there are clear links both for graduates entering the workplace and for CPD. Educational provision spans the range of content and technology aspects of the moving image industries – similarly to Edinburgh.

Cologne's various moving image festivals help to strengthen its attraction as a tourist destination and business centre. The festivals have a strong commercial element –through which the city becomes a centre for moving image related business and entertainment.

### 8.1.6 New York

| | |
|---|---|
| **Population** | ~ 8 million |
| **Working Population** | 3.7 million |
| **Transport Infrastructure** | NY has the largest underground network in the world, 2 major international airports and 1 airport for domestic flights; 20 commuter rail lines with 250 stations handle 150 million commuters annually; intercity trains running to Canada and metropolitan cities along the east coast; NY has an extensive motorway network and several bridges and tunnels link the two sides of the Hudson river . |
| **Creative Industries Employment** | 309,142 |
| **Number of Creative Industries Businesses** | 11.671 (businesses in the "creative core")[51] |
| **Key Buyers** | ABC, CBS, FOX and NBC have their HQ in NY |
| **Events and Festivals** | 31 different film festival take part in NY every year |
| **Education** | Brooklyn College; Tisch School of the Arts @ NYU; NY Film Academy; Juilliard School |
| **Public Sector Support** | New York's Department of Cultural Affairs; Mayor's Office of Film, Theatre & Broadcasting (MOFTB); "MADE IN NY" incentive programme |
| **Public Investment** | The NY city council will provide $30 million in City financing annually for local film and TV productions till 2011 through its tax incentives programme "Made in NY". Strong Philanthropic, corporate and individual support network including Rockerfeller Foundation and the Ford Foundation. |
| **Key Strengths in MI** | New York City is the nation's largest metropolitan media market; one-third of all independent films in the world are produced in New York City |

**Overview of city**

Although Los Angeles has the largest slice of the film and TV industries in the US, New York is the undoubted 'creative heart' of the country. No other city even comes close to matching

[51] The "creative core" comprises nine industries: Advertising; Film and Video; Broadcasting; Publishing; Architecture; Design; Music; Visual Arts; Performing Arts. (Centre for an Urban Future, *Creative New York,* December 2005)

its labour pool – across all the creative industries. According to recent figures[52], the city is home to over a third of the country's actors, around 27% of its fashion designers, 12% of film editors, 10% of set designers, 9% of graphic designers and 7% of fine artists.

Like London, with which it compares itself most often in this regard, financial and business services remain larger sectors, but creative industries have added jobs at a faster rate than the overall city economy. Between 1998 and 2002, employment in creative industries grew by 13.1%, as opposed to 6.5% in the overall economy.

It is this large labour pool which the city sees as its primary strength in attracting and retaining creative industries firms, and the 'concentration effects' in these sectors, mean that such a dominant position, once build up by a city, is difficult to erode.

Nevertheless there is concern in New York that changes in communication and distribution practices, lead by digital technology, together with a series of 'big city' problems, could undermine its dominance in the near future.

In the film industry in particular, many production companies have re-located to lower cost production centres such as Toronto and Vancouver in Canada, and even Louisiana in the US. There is a precedent for this in the music industry, which left New York during the 1960s for Los Angeles where costs were (at that time) lower and there was more public support available.

Although there is a huge network of public, private, philanthropic and community cultural organisations in New York, it does not yet have a clear structure of support for the Creative Industries, such as 'Creative London.' There are a series of supports for the film and moving image sectors as described below, but these risk being piecemeal if they are not strategically supported. In addition, they do not necessarily make the links between the moving image sectors and other parts of the creative economy. Both London and New York have a vibrant mix of "not for profit" and "for profit" ventures that allow actors or film technicians to make a living moving between subsided theatre, advertising voice overs, TV and film. At the 'lower' end of the labour market this allows creative workers to make a living in what is a very insecure industry, but it also serves to attract top level talent by allowing those who have attained commercial success to gather creative kudos as well e.g. film actors who are often keen to take a substantial pay cut to work on stage.

**Studio Facilities**

In New York city there are 28 studio facilities[53].

**Production Companies**

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[52] Creative New York, Centre for an Urban Future, December 2005

[53] http://www.kftv.com/product-state-5970-NY.html

New York hosts 212 production companies (ibid). Traditional media industries (broadcasting, film and advertising) contribute USD2bn value a year to the New York economy. Another USD5bn comes from digital media industries[54].

**Events and Festivals**

Manhattan offers a wide range of audiovisual events and festivals throughout the year. The database of the New York Major's office of Film, Theatre & Broadcasting lists 31 festivals.

**Public sector support of Moving Image**

Although there is no over-arching support programme for 'creative industries,' the cultural sectors in New York have, for a long time enjoyed a higher level of attention and support from city government than is the case in most other US cities. Indeed, the New York's Department of Cultural Affairs (DCA) has a larger annual budget than that National Endowment for the Arts (the closest the US has to as Arts Council).

The majority of the DCA's USD131 million budget goes on what we would call regularly funded organisations, such as museums, but in recent years, the current mayor, Bloomberg has shown as interest in supporting the more market-facing sectors as well.

Recent initiatives from City Hall include the Mayor's Office of Film, Theatre & Broadcasting (MOFTB), which is the central clearinghouse for production support in the city, including free permits, access to public locations and police support during filming.

Fear of what is called 'runaway production,' that is the loss of film and TV to lower cost locations, led to the establishment of the "MADE IN NY" incentive programme, which includes a variety of support measures including tax and marketing credits along with expanded customer services for production.

For films and television productions that complete at least 75% of their stage work in New York City there is a:

- 10% refundable tax credit from New York State
- 5% refundable tax credit from New York City
- An incentive based on New York production costs

In addition, for film and television productions that complete 75% of their work in New York City, there is what is called a 'marketing credit.' Outdoor media valued at 1% of New York production costs will be offered to participating productions for co-branded advertising related to the "Made in NY" production. These include advertising at bus shelters and broadcasts on local TV and radio stations.

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[54] The Boston Consulting Group (2000) *Building New York's visual media industries for the digital age*

Such measures seem to have been having some effects as the table below shows:

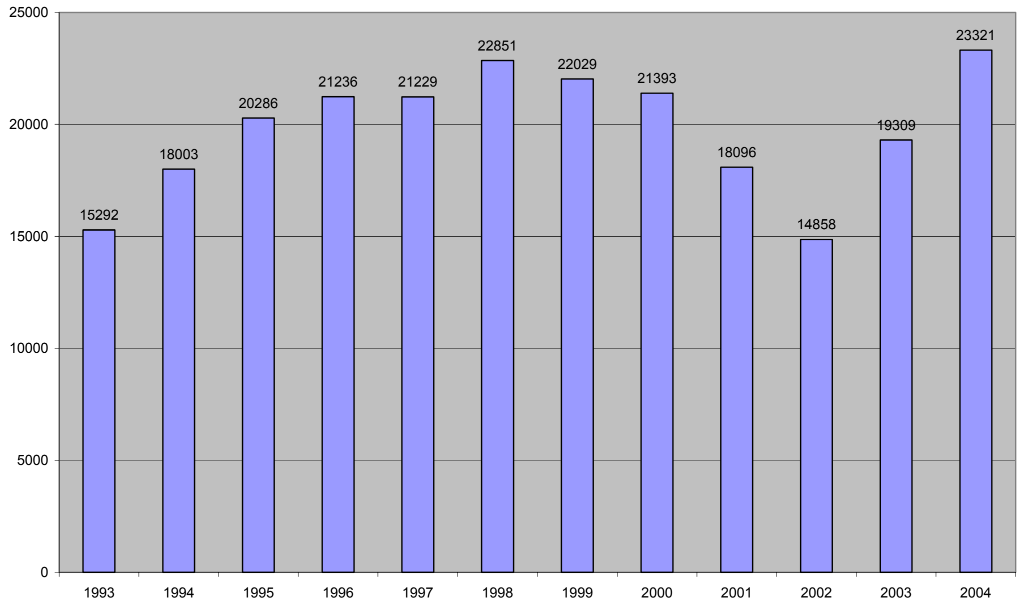


**Figure 14 - Film and TV location shooting days in New York, 1993 - 2004**[55]

Again, in a reflection of the links between the for profit and not for profit sectors in the city, in conjunction with the marketing credit, a 'Cultural Benefit' allows productions to make a cultural donation equal to 0.1% of their production costs, to a "not for profit" cultural institution of their choice, in exchange for the marketing credit. The donation would be made in the name of a performer or an executive associated with the project, and is intended to support the theatrical, film, writing, and other local arts institutions that nurture upcoming talent and strengthen the City's creative community.

On August 2 2005, Governor George E. Pataki signed into law an investment tax credit for taxpayers that own qualified film production facilities. The law encourages the creation and expansion of production facilities in New York State and has already borne fruit with the development of Steiner Studios, the city's first purpose built production facility in the Brooklyn Navy Yard. Tax credits have also supported expansion at other studios such as Silver Cup in Long Island, which produced five television pilots for the Autumn 2005 season, only one of which would have been done in New York if it were not for tax credits, according to Alan Suna the CEO of Silver Cup.

Further support for the non profit sector came when it was announced that Film/Video Arts, (FVA) and Independent Feature Projects (IFP), two organisations that were set up to support independent filmmakers, were selected to receive a USD100,000 grant to create an action plan for developing a Media Arts Centre in Lower Manhattan. The development of the centre is to assist with the redevelopment of Lower Manhattan and create a single focal point for the

[55] The City of New York Mayor's Office of Film Theatre & Broadcasting

city's independent filmmakers. If it gets the go-ahead, the new centre would include office space, screening and editing facilities, classrooms, and spaces for special events, meetings and conferences.

**Lessons for Edinburgh**

Edinburgh is clearly working on a different scale to New York, in terms of both size and international profile. However, Edinburgh should look to mimic New York's proactive approach to supporting and encouraging production. "Made in NY" is a recognisable brand that communicates the ease of using the city as a location. While Edinburgh may not be able to offer the tax breaks – it could aim to promote ease of access, first class locations support and a range of other support mechanisms.

Like New York, Edinburgh has the opportunity to take advantage of prominent and individuals and brands with connections to the city. For example, the city's strong financial sector may be a good source of funding and sponsorship, as would key figures from the moving image sector.

Edinburgh should also aim to follow a similar approach in aiding links between commerical production and community/educational activities – providing the infrastructure and support required for this to happen.

### *8.1.7 Summary of Comparative Lessons for Edinburgh*

From looking at all the comparators the following arise as success factors for cities that have built strong moving image sectors:

- Access to major buyers – although the city may be able to grow its sector where access is available in another city that is close by
- Critical mass of moving image businesses in the city
- Links between the industry and the education sector
- Commitment from public sector agencies to ease the task of filming in the city
- High profile film and moving image festivals, preferably with a commercial and forward-looking focus
- Strong public sector agencies supporting the moving image sector
- Commitment to cultural regeneration in the place-making and economic development strategies – the availability of regeneration grants is an important factor and Edinburgh's ineligibility for structured funding is a major challenge to large scale public investment
- Access to a deep talent pool

### *8.1.8 Other festivals*

Appendix 6 shows a calendar of moving image related festivals - a full calendar of events spreading across the entire year. This shows the extent of the competition with which EIFF is faced.

Appendix 7 provides a summary of some of the main moving image festivals. Most festivals of this kind, including the highest profile festivals such as Cannes, receive public support – typically 40 – 60%.

## 8.2 Strengths, Weaknesses, Opportunities and Threats

The main strengths, weaknesses, opportunities and threats applying to Edinburgh's moving image sector are summarised in the diagram in Figure 1. This diagram was compiled by NMP LTD. with input from the primary research consultations and arising from the workshop held with stakeholders.

The Action Plan in the following section aims to build on Edinburgh's existing strengths and the opportunities identified. At the same time the city's weaknesses are taken into account. Where weaknesses can be overcome, approaches are suggested. Where this is not practical or realistic, then the strategy aims to suggest approaches that minimise weaknesses. Building an action plan in this way also helps to minimise the city's exposure to the identified threats.

Drawing on evidence from:

- Mapping the current moving image sector in Edinburgh
- Considering comparative cities
- Extensive consultation with a range of stakeholders
- Trends analysis of the moving image sector

**STRENGTHS**

- Location and heritage
- Capital City/Parliament City Status
- Culture and lifestyle
- Festivals (TV and Film)
- Key sub-sectors – advertising, animation, documentary
- Connectivity
- Education Institutions
- R&D and Innovation
- Availability of Graduates
- Supportive Local Authority
- Existing connections and collaboration

**WEAKNESSES**

- Too much emphasis on Edinburgh's past
- Lack of critical mass in production sector
- Lack of major buyers
- Shortages of experienced talent
- Lack of finance options
- Broadcasters not present in the city
- Lack of facilities houses and post-production
- Parking and location support causes difficulties
- Current lack of differentiation in moving image
- Links between stakeholders not substantiated
- Availability of affordable property and premises

**OPPORTUNITIES**

- Build networks of common interest
- Exploit technology and content
- Extend the role of moving image in tourism strategy
- Support new audiences and new involvement
- Develop and support new platforms
- Forge better links to the outside
- Build on Screen Academy status
- Build moving image into the Edinburgh brand
- Share resources and joint working initiatives
- Differentiate from Glasgow
- Establish National status for strongest elements
- Develop the moving image cluster

**THREATS**

- The "do nothing" scenario
- Edinburgh could become uncompetitive
- Lose key elements such as the EIFF
- Over-emphasis on film presents sustainability problems
- Failure to build on new developments
- Lack of communication between stakeholders
- Lack of commitment to collaborative working

**Figure 15: SWOT Analysis for Edinburgh's Moving Image Sector**

We have identified a number of themes that will form the basis of the Action Plan. These themes are:

Theme 1: Pioneering Digital Technology and Content
Theme 2: Supporting the Sector's Growth
Theme 3: International Links
Theme 4: A City of Next Generation Learning
Theme 5: Physical and Creative Environment
Theme 6: Looking Outwards, Together

# 9 RECOMMENDATIONS

## 9.1 Theme 1: Pioneering Digital Technology and Content

### *9.1.1 Attract technology company or new platform buyer*

One of the key weaknesses facing Edinburgh's moving image sector is the current lack of a major buyer in the city. While there have been attempts in the past to attract the terrestrial broadcasters Channel 4 and Five to the city these have not been successful. In attracting inward investment in the form of a major buyer it makes sense to market the city's strengths and act accordingly.

At present there is no cable or satellite channel based in Scotland – and yet there is a growing dispersion of production companies in Scotland (as well as in other regions and nations) stimulated to some extent by Ofcom's quotas for out of London commissioning. Edinburgh's position with respect to connectivity, in particular at the state of the art business facility in Edinburgh Park, make it an ideal choice either for one of the secondary UK broadcasters, which might be looking for less costly premises outside of London. Equally, it could be sold as a good choice for one of the new platforms for digital content – a mobile telecoms company, major ISP or other technology player.

Edinburgh Park is substantially further developed than Pacific Quay in Glasgow, provides good transport links in all directions and benefits from a supply of skilled graduates and advanced knowledge transfer opportunities from the Edinburgh universities.

A technology company or new platform buyer inwardly investing in the city would help to re-dress the imbalance with respect to buying power lying on the West coast. It would also play an important role in consolidating Edinburgh's existing strengths in content creation and technological innovation. This company would also be an appropriate target to contact for inwardly investing in cultural or partnership initiatives.

### *9.1.2 Support and promote knowledge transfer*

The University of Edinburgh, and to some extent Heriot Watt University, have established track records in knowledge transfer and commercialisation of research in areas relating to moving image.

The University of Edinburgh's existing partnerships with Edinburgh College of Art in this area are a positive feature, as are a whole host of HE – industry links.

There is an opportunity to combine forces with respect to knowledge transfer for the moving image.

One specific area would be for the advertising industry. Some of the technological developments that are emerging from University of Edinburgh research groups, for example, have potential for implementation in the advertising industry. Gains can be made on either side through establishing a dialogue between the academic departments and the industry.

### 9.1.3 Encourage sharing of equipment and infrastructure

As technology changes quickly, there is a need to up-grade and replace equipment on a regular basis. Groups such as small companies, education institutions, community groups all face an on-going battle to keep up to date with the latest equipment, thereby maintaining competitiveness and expected industry standards.

The FE colleges, and to some extent HE institutions (for example through Screen Academy) have begun to share resources and jointly negotiate procurement and this type of approach should be encouraged. Further to this, there may be opportunities for educational institutions and industry practitioners to share resources.

There is a need for industry practitioners to access equipment, and at the same time, students are looking to extend links with industry. A brokerage service could match enquiries from the industry to opportunities in the universities and colleges – either for access to equipment, or for the technical or creative input from students or staff too. Clearly this would need to fit in with course requirements and with the demand for access to equipment from students – this is why a multi-partner brokerage system would be ideal. Either the industry or academic partners could advertise either available or wanted resources.

### 9.1.4 Encourage opportunities that combine technical and creative skills

Again, some of the collaborative projects that are being undertaken at Edinburgh's universities are combining technical and creative skills in new and interesting ways – in particular those collaborations between the University of Edinburgh's Department of Informatics and Edinburgh College of Art.

With an increased pace of change with respect to delivery platforms, production methods, in-house post-production, devices and distribution – there is an ever increasing need for creatives to also gain technical skills (or at least technical literacy – ie the ability to translate their ideas to a technical developer) alongside creative skills and vice versa, increasingly technical developments benefit from creative approaches and outlooks.

Edinburgh is in a strong position to exploit this coming together of technical and creative capabilities, positioning itself as a creative and innovative city.

Skillset has reported that around 92% of those working in film in Scotland have also worked in other areas of the audio-visual industries. In the digital age it will be essential to continue this type of adaptability between the sub-sectors and promote excellence in cross-cutting skills such as creativity, script writing, production and editing.

### 9.1.5 Develop new opportunities for digital exhibition

Edinburgh can play a role in both developing and implementing digital exhibition. One specific opportunity is to follow up the PSB opportunity and become part of the next wave of cities to join the BBC's initiative. This would involve securing a commitment from the City Council, but also attracting a commercial sponsor. The Royal Bank of Scotland has supported previous big screens and is an obvious starting point for Edinburgh too. Alternatively other corporations should be targeted.

Involvement in this initiative would provide Edinburgh with an alternative medium for sharing locally created content from coverage of events to video-based art work. It would also help to re-position the city as forward-looking but at the same time could be used to help promote the city's historic and cultural heritage.

Other opportunities include encouraging the use of digital formats across the city's public spaces, venues and attractions. This could be in conjunction with some of the innovative platform technologies that are emerging from the city's universities (Department of Informatics in particular).

It would also be advantageous to approach the multiple facilities with a view to arranging bookings for off-peak use of the cinemas for community, education and other purposes as well as for additional screens for the festivals.

## 9.2 Theme 2: Supporting the Sector's Growth

### *9.2.1 Information and brokerage*

On consultation with moving image sector businesses, there appeared to be a gap in core business support, for example, in marketing, business strategy, planning, training, intellectual property rights, leadership and management, deal-making etc.

At the same time, some of the existing provision was not well used by moving image sector businesses. There appear to be two challenges arising: the need to provide information about what business support is available to moving image sector businesses; and a need to ensure that the available provision is meeting the moving image sector needs.

Several of the business consulted felt that their sector was not well supported. They were aware of initiatives such as Creative Edinburgh and Business Gateway but did not feel that these were aimed at businesses like theirs. Partly this is an issue of information and marketing of the existing provision rather than a serious gap in provision.

There are many business support advisors in the city (including lawyers, accountants, consultants etc) but there are still only relatively few specialising in the creative industries sector. At the same time, informal anecdotal evidence suggests that few of the creative industries businesses take advantage of the business support services offered, for example, through Business Gateway.

The Cultural Enterprise Office was set up to address this issue – and has proved very popular – to the extent that plans are afoot to extend it from the original three to five cities in the near future. The Cultural Enterprise Office has specialist advisors relevant to moving image industries and an Edinburgh office. This office mainly deals with early stage businesses though, and there is a feeling that there are still gaps in terms of business support for more established businesses.

Agencies specialising in supporting the moving image industries include Scottish Screen, The Research Centre for Television and Interactivity (The Research Centre) and the Producers Alliance for Cinema and Television (PACT). These three agencies all have offices in Glasgow. PACT and the Research Centre have both indicated that their involvement with Edinburgh companies is much less than with their Glasgow counterparts.

PACT, for example, has run some workshops and events in Edinburgh from time to time, but finds these expensive to support due to the need to hire venues and source refreshments (whereas for Glasgow events they use their own premises and resources). PACT also instigates commissioner road shows in Glasgow but does not bring these to Edinburgh. Partly this is due to a perceived lack of demand – a separate attempt by ITV commissioners to run a road show in the city failed to drum up sufficient support to make it worthwhile.

What is required is a mechanism for providing information for Edinburgh based moving image companies and practitioners – then they will find out about events and training opportunities. Where gaps exist in the provision of particular forms of training and support, then demand can also be aggregated through this same mechanism.

In particular, there is a need to raise the awareness of grants and finance available – this is a role for the Producers Network, for the Cultural Enterprise Office and for Business Gateway.

### *9.2.2 Business start-ups and incubation*

This activity has a three-fold agenda:

- To increase the number and lifespan of business start-ups
- To facilitate growth of micro-businesses into SMEs
- To provide intensive, targeted support for high growth companies

The universities, with support from Scottish Enterprise in many cases, are already providing a valuable service in supporting start-ups through their Research and Enterprise Departments, through Scottish Enterprise's Proof of Concept Fund and other initiatives.

There are some moving image related businesses and projects benefiting from such provisions already (as has been discussed in the sections on higher education), mainly in areas of technological development. There are also some collaborative projects, for example, between Edinburgh University Informatics Department and eca that appear to be promising.

The changing nature of the moving image sector is such that real benefits can be gained by combining the creativity of the content and design-based disciplines with technological innovation of the engineering and science based disciplines.

While technological developments are progressing rapidly in the sector, there is a growing requirement for content that is compatible and adaptable to new platforms and for a whole range of intermediate technologies that enable access and interfacing to new content, support payment and security and enhance the user's experience of accessing content across different platforms.

An overwhelming tendency in technology-based start-ups is to develop products and then look for markets in which to exploit these. By collaborating with the creative disciplines, technology-focused businesses can begin to target their efforts on market need and thereby increase their chances of success.

There is little provision of incubation space within Edinburgh that is suited to moving image sector businesses. Moving image sector businesses are often run from practitioners' homes, as business premises in the city are both expensive and difficult to find.

Incubation is key to start-up businesses. The provision of shared office and administrative support, guidance on business start-up, flexible accommodation and rentals and the shared experience of co-locating with other businesses at a similar stage of development and with related creative needs are all key benefits.

At present the main incubation and supported business parks for Edinburgh and Lothians fall within the Edinburgh Science Triangle. There is some relevance for the very technological side of moving image here – perhaps through the Alba Centre's focus on chip technologies, or through the Informatics work at Edinburgh Technopole. It would be a key addition to the Science Triangle concept and very much within the remit of Innovation and active collaboration to add provision that focuses on moving image – in terms of the all-important cross-over area between content, technology platforms and content accessibility.

### *9.2.3 IP-based businesses*

Businesses on both the creative and technical side of the moving image industries need to be aware of the value of the Intellectual Property (IP) residing in their businesses in order to achieve growth.

For many creative businesses, growth is hampered by a failure to recognise, protect and exploit IP rights.

It is not just technology-based businesses that can benefit from exploiting their IP. Content businesses too need to understand the issues.

The new terms of trade for commissioning television programmes from independent producers which came into force in 2004 have meant that producers get to retain rights over their television content – only licensing their content to the broadcasters for particular uses. This means that producers are free to exploit their content in secondary TV markets (cable, satellite, overseas etc) or through distribution of products (DVD and video etc).

The new terms of trade are a positive step for producers in that they have greater control and ownership of their creative content. However, the new terms of trade also mean that producers have to cover a greater portion of up-front costs than previously and take on more risk.

Moreover, many independent production companies that traditionally focused on the creative aspects of their business find that the new terms of trade require a greater level of commercial acumen, including skills that are often not present in the company.

For these companies, support is often required to help identify existing IP in the back catalogue and to develop strategies for exploiting existing IP and for developing further content with IP exploitation in mind.

The advent of new media platforms for content distribution brings with it another set of issues for which rights owners need to prepare. Ofcom's review of the television production sector[56], for which consultation closed in March 2006, invited industry stakeholders to reach an agreement for new media rights. In the spirit of the "light touch" favoured by the regulator, industries stakeholders were given a two month period to come up with their own suggestions for new media rights, following which Ofcom would step in, if necessary, with its own codes of conduct.

Creative companies need to know how best to organise themselves to deal with new opportunities and threats arising from new markets, business models and buyers that are involved in new media – they need to know how to develop, protect and exploit their IP.

Support should be targeted at IP-based businesses. It will be important to ensure that Edinburgh's moving image sector businesses have access to the specialist advice and support they need to survive and flourish in a market place where IP exploitation is increasingly important.

There is existing expertise in Intellectual Property Rights in Edinburgh – for example, within the University of Edinburgh Department of Law. Scottish Enterprise, Business Gateway and the Cultural Enterprise Office also provide support for IP issues. The Creative Entrepreneurs Club runs seminars and surgeries on IP for creative companies – these tend to be located at either The Lighthouse in Glasgow or DCA in Dundee – there should also be events taking place at a suitable venue in Edinburgh.

Bringing this expertise together to share knowledge and to run seminars or offer mentoring would be invaluable for many businesses. Seminars could also bring in local support businesses such as accountants or lawyers with a specialist knowledge of the sector – encouraging connections and introductions between businesses and sources of additional support.

### *9.2.4 Shared resources*

The lack of critical mass in certain areas of the industry and the proliferation of small companies can be construed as a weakness. The moving image industry in Scotland, let

[56] Ofcom, *Television Production Sector: A Review,* 2006

alone Edinburgh is small and there are well-publicised difficulties in attracting experienced talent.

This is a problem that is faced in the English regions too – it is a problem of scale. Additionally, there is a frequent issue that individual production companies require talent, but do not have sufficient work to keep them on a permanent (or even regular) basis.

One approach that is being piloted in Glasgow is to aggregate demand for talent amongst the production community – this would be a good general approach for Edinburgh too.

So, where a number of production companies have a need for someone with particular skills, they collectively appoint the individual – providing some joint commitment to providing sufficient work for that individual to base themselves in the city (either on a temporary or permanent basis). Such a scheme could be managed or under-written in some way through public sector agencies and it could link well with the producer's network. It would not require substantial public sector funding as this is only about aggregating demand, not subsidising provision.

### *9.2.5 Transferable skills*

Again, where the size of the moving image sector is still small, businesses should be encouraged to work flexibly within the different aspects of the industry. In particular, producers working primarily in film should be encouraged to look for more commercial opportunities in television, creative commercial work or new media. We are not envisaging any sense of compromising creativity – this is about finding alternative markets and platforms in which creativity can be supported.

On the business side, the need for businesses to increase their commercial skills may be partly met through appointing personnel from the more commercial types of business, such as advertising to help them to drive their market development.

## 9.3 Theme 3: International Links, Global Trade

### *9.3.1 Centres of excellence*

Edinburgh should be looking to position itself internally, nationally and globally as a leading centre for moving image. Building on its strengths, the city should aim to become a centre of excellence for the following:

- Moving image education and training
- Exhibition and new audience experiences
- Innovation and technological developments

In addition, it should build on its impressive track records in:

- Advertising
- Documentary
- Animation

Moving image activity in the city will not be limited to these areas – but they will form the focus for PR purposes and for investment priorities. Edinburgh should move towards a position where amongst the relevant moving image industries, and beyond, it has a reputation as a Centre of Excellence.

### *9.3.2 Visitors and Alumni*

**Locations**

During the consultations, some producers pointed to the difficulties of filming in Edinburgh. Aspects such as road closures and parking were deemed to be an issue for some:

“Parking and road access is a real problem…We have to use taxis to get from location to location”– Scottish-based producer.

Access is a significant issue to a city which is a capital city, a major tourist destination and is built around historical infrastructure. Edinburgh Film Focus works with other film offices around the UK to help ensure that there are similar standards and to help develop and spread best practice.

City of Edinburgh Council states that it can close roads in 2 weeks. However, often it can actually be arranged within a single week – which is the minimum allowed by legislation. It also provides a number of benefits that are beyond the standard:

- Free parking on single yellow lines to film-makers that supply their registration details
- 24 hour notice for single yellow line dispensation
- 72 hour minimum notice for bay suspension

City of Edinburgh Council should look to address this perception and help Edinburgh Film Focus continue to aid smoother locations support if it is to raise the extent of filming in the city.

Edinburgh should continue to strive to earn and maintain a reputation as a city that welcomes and supports filming and goes out of its way to be “film-friendly”.

**Visitors and Alumni**

Edinburgh has a strong tradition in both education and exhibition and for its film and TV festivals. It is also fortunate in being home to a number of well-known professionals and academics. The city attracts a significant number of high profile, influential and important individuals either as visitors or as short-term residents.

The moving image stakeholders should aim to maximise the impact of visitors to the city – sharing them wherever possible, for example across public events, mentoring opportunities, educational seminars and commercial activities. An extension to this is a mechanism through which groups of moving image stakeholders get together to identify target visitors and put together a schedule of events and activities that make it worth them coming to the city. At the same time this allows for sharing limited budgets to pay for visitors.

Particular targets would include those that have existing links with the city. For example, alumni from the universities that have gone on to build successful careers. Rather than viewing these individuals as talent lost through the “brain drain”, the city should see them as resources that can be tapped for transferring skills and status back into the city.

Edinburgh attracts visitors from across the world – wherever possible connections should be made with these visitors – helping to stimulate links with local moving image related activity and enhancing the horizons and influences of local practitioners.

Building a database of key moving image practitioners and academics with links to the city will be a good first step. This could be followed up with electronic bulletins, discussion groups, information provision and events.

### *9.3.3 Co-ordinated approaches*

As well as supporting ways for visitors and alumni to retain and repeat links to Edinburgh, resident practitioners should be encouraged to think in International terms too.

Markets are not restricted to Scotland or even to the UK. Edinburgh based businesses should look wider to exploit their products and services. The public sector agencies can support visits to major markets. However, rather than individuals attending these events, Edinburgh businesses and practitioners can gain strength in numbers by coordinating their efforts, taking out booths at major markets that promote a selection of their work, arranging joint meetings with buyers or embarking on trade missions. The coordination may be of groups of similar companies or may be through matching technology businesses with content developers.

### *9.3.4 Thinking Big*

The recommendations within this theme all lead to Edinburgh positioning its moving image sector in international terms. This involves the following:

- Businesses operating in international markets
- Maintaining and exploiting global links that are exploited in the local area
- Collaboration and co-ordination with European or international initiatives
- Developing a role and reputation on a global scale

In the pursuit of this global status Edinburgh should stop making negative comparisons with competitors (in particular Glasgow) and start to build on its strengths and even work collaboratively with would-be competitors where its is advantageous.

Elements that will help to achieve this goal include:

- Positioning the festivals to ensure that they attract talent and industry participation
- Following up corporate interest in sponsorship of cultural/commercial projects such as the moving image centre or others, building on interest that has already been expressed from Sony Corp. in a proposed Museum of Photography

- Linking in to the city's branding and promotional activities and ensure that moving image is within the proposition for key agencies including Event Scotland, VisitScotland, SDI and in particular the Edinburgh Inspiring Capital work
- Building the physical infrastructure and a showcase for moving image in Edinburgh – for example, through the Moving Image Centre, the PSB (Big Screens) and pushing for recognition of the moving image sector within the Leith Initiative regeneration plans
- Marketing the city's strengths within Scotland – so that national agencies fully recognise Edinburgh's key role within the national portfolio

## 9.4 Theme 4: A City of Next Generation Learning

### *9.4.1 A learning city*

The Scottish Executive estimated that 85,000 people in Edinburgh and the Lothians were in Higher and Further Education in 2003. (15% up on 1998)

Moving image can become a significant tool in Edinburgh's continued development of its role as a Learning City.

The city has a reputation for moving image education, but it could also build on its early forays into using moving image within the broader realms of both formal and informal education.

Evidence of the value of moving image in education is provided through the success of the Scottish Screen moving image education trials in selected Edinburgh schools and also in the community sector – Pilton Video, Media Education Ltd, SKAMM and YPSO.

As part of Edinburgh's commitment to be a learning city, it should aim to educate its citizens so that they develop media literacy in its broadest sense – an understanding of the new platforms and devices that are available to them, awareness of the range of content available to them, but also skills to interpret and evaluate the content the access.

Moving image can even provide the format for delivering some of the training and learning – through TV-based, Web based and multi-media techniques. The city should aim to pioneer blended-learning techniques – combining the best of face to face, e-learning and multi-media formats – to achieve cost-efficiency and to maximise learning outcomes.

### *9.4.2 CPD*

The particular opportunity for developing a role for providing CPD for the moving image industries has already been discussed in this document.

Screen Academy already has plans in place to develop CPD within its second year. A broader selection of CPD could also be developed – through the activities of partners such as EIFF, Edinburgh Filmhouse, possibly the TV Festival as well as with the HE and FE providers. The Moving Image Centre would be a good base for this activity and support should be sought from Skillset and NESTA.

This could then lead to Edinburgh positioning itself as the key centre for Moving Image education outside of London – a recognised destination for visiting CPD students as well as for the indigenous Scottish moving image industry.

### *9.4.3 Innovation in learning*

Building on Edinburgh's growing reputation both as a learning city and as a moving image centre, innovation relating to learning should be encouraged.

This includes the development of learning technologies through the universities – for example, University of Edinburgh is involved in the use of game-based techniques with school children.

A centre such as the Filmhouse can provide a central point through which new technologies and content can be connected with education practitioners.

### *9.4.4 Learning journeys*

There are already some informal arrangements whereby progress can be made through the various different moving image educational routes. For example, there are existing opportunities for students to pass from Pilton Video, on to Stevenson College and then through to Napier University or Queen Margaret University College.

However, many such links hinge on individual lecturers and workers' relationships. It would be useful to formalise these links so that there are clear learning journeys through moving image education. These would be flexible and varied according to individual student needs – but would be clearly sign-posted by the relevant information and support agencies and within the providers themselves.

In addition, there are existing structures in place through SQA for the accreditation of work-based learning. Currently there are no registered schemes for moving image related work-places – but this would fit in well with the working and training practices of the sector. This approach would also provide freelancers moving between companies to show evidence of their training and aptitudes. Training providers across the city should also be encouraged to gain accreditation for their training programmes and courses – this would help those seeking training and those agencies that may provide funding.

Higher and further education institutions should be encouraged to form and maintain strong links with the moving image industry and with Skillset. Building on the reputation of Screen Academy rather than working in isolation, educational establishments can build a strong portfolio of moving image education opportunities that are closely responsive to industry needs.

It is extremely important to provide flexible learning options for people working in the creative industries and moving image sector and Edinburgh's education providers should be encouraged to facilitate transitions and learning journeys. Skillset is keen to see an accreditation scheme for computer games development, for example. Edinburgh's institutions would be well placed to make a first move and become early adopters of this new approach to learning and accreditation.

## 9.5 Theme 5: Developing the Talent Pool

### *9.5.1 Attracting and retaining talent*

There is currently perceived lack of talent available within Edinburgh. Existing talent in the city is polarised around those with a good deal of experience and newcomers with little experience.

Raising the profile of the moving image sector in Edinburgh can play a major role in attracting talent.

This can be achieved, for example, through the attraction of a buyer – an approach that has been very successful in Manchester where the plans for the BBC have initiated anticipatory growth. It could also be tackled as part of the remit of the festival – by increasing the industry focus of the festivals there are opportunities to attract talent for both short and longer visits. Having a physical location for the moving image sector will also help stimulate awareness of the city as a moving image location, thereby attracting talent.

### *9.5.2 Sharing talent*

Opportunities should be investigated for attracting particular individuals to the city and guaranteeing them a certain amount and level of work – spread across a number of stakeholders. For example, several producers may buy in to a scheme to make sure that there is sufficient demand for an individual practitioner to locate (either permanently or temporarily) in Edinburgh. This individual may also be used within Screen Academy, for events at the Filmhouse or even within the community initiatives.

### *9.5.3 Nurturing talent*

FE and HE provision in the city is good and provides a plentiful supply of eager and willing graduates. Screen Academy too will make an impact in terms of providing a bridge between education and the "real world" – through its work-based approaches.

There is also a need to provide on-going support and development opportunities to allow emerging talent to up-skill, to gain opportunities to use and develop their crafts and to ensure that there is a continued supply of experienced talent.

Skillset has identified a need for post-graduate provision to support the development of senior leaders and creative entrepreneurs in the TV industry. Edinburgh's institutions should combine forces to put together a consortium of partners to address this need, perhaps coordinated by the Cultural Enterprise Office.

There is also a need to help support practitioners with an expertise in film-making to transfer their skills to new areas – for example, applying their skills to new media production thereby increasing their ability to attract a variety of work.

## 9.6 Theme 6: Physical and Creative Environment

### *9.6.1 Creative places and events*

Moving image should be an element of many of the wider regeneration, town planning and economic development initiatives. For example, Capital Streets – A £17.3 million project running from 2003 – 2009 that aims to improve streets and public places in Edinburgh. While most of this is based on the improvement of road surfaces, street furniture and seating areas, there is also provision within this project for "providing service points for future public events" and "developing a programme of new events and activities to continuously animate the spaces". This is a perfect fit with the big screens initiative or for other moving image related display of content. The big screens should be followed up without delay as other cities (such as Bradford) are catching up fast and Edinburgh should not miss out on this opportunity.

The Leith Initiative is the other key opportunity for the development of creative places with moving image playing a key role. There is an opportunity to build on the existing moving image cluster in the Leith and Granton areas (covering a total of 170 hectares), to incorporate moving image related public art opportunities and to locate cultural features in the area. The Leith Docks Development Framework includes a provision for public art. Additionally, the area will be increasingly suitable for public cultural facilities once either the tram or alternative public transport solution has been implemented.

This area should be considered as one of the options for locating the Moving Image Centre. This would not be without risk, but if successful, would help to attract audiences and participants from local creatives, adding to the NTE and establishing a physical focal point for the moving image in a location that has existing (organic) associations and presence.

### *9.6.2 Festivals*

Edinburgh's moving image related festivals play an important role in terms of:
Adding to the city's rich festivals and cultural offering
Adding to the city's profile as a major cultural centre
Providing residents and visitors with opportunities to access a range of moving image content
Contributing to the city's attractiveness for moving image sector businesses and practitioners
Providing a forum for business deals and networking
Bringing key industry players to Edinburgh

However, against the continued competitive pressure from other film festivals and a tightening of sponsorship budgets, the EIFF is suffering. EIFF needs to take a strategic approach for its future - making a clear demonstration as to what its target audiences are, what it is offering the industry and how increased support from the public purse could be justified.

Some simple approaches have been suggested through the process of this research, such as better marketing of EIFF to new audiences – for example, providing block bookings at reduced prices for delegates of the TV festival or other events.

By shifting the emphasis of the festival to cover new platforms as well as film, new interest for sponsorship may be opened up. There are a range of companies that are interested in moving image as a promotional media – the loss of Orange as a major sponsor of the film festival is unfortunate as this is a company attempting to make head-way as a media player with a technological background. Fund-raising efforts should shift to companies such as BMW and Audi that have both put their names to commissioned content (Audi through the first sponsored DTV channel, and BMW through commissioning well known film directors to make promotional shorts). Approaches should also be made to companies that are at an earlier stage in positioning themselves as media companies – the merged NTL/Virgin entity springs to mind as a key target. However, these types of companies will only be attracted if the proposition fits with their own brand values. Provided EIFF is willing to continue to pursue new approaches, such as it has done with Pocket Shorts, there should not be any need for compromise in this matter.

There may at some stage be a convergence of interests between the EIFF and EIEF. It would be useful to pursue common interests with a view to collaboration, joint marketing, shared venues and screenings.

EIFF can also position itself as an event that provides services to the industry. While it would take a lot of time and investment to make EIFF a major market, there may be opportunities to increase the range of industry services. These could include training courses and skills events that potentially attract funding through Skillset, or that are charged at professional rates to participants or, in some cases may be supported by vendors (such as Avid, Sony or Thompson for example).

The physical focal point for the festival would provide sufficient exhibition spaces for public events and screenings, industry events, training activities as well as sufficient recreational areas for business to take place.

### *9.6.3 Night time economy*

The Night Time Economy (NTE) of any city attracts and retains high end human resources, creatives, students, graduates as well as mainstream investment (Lovatt & O'Connor 1996; Florida 2000). A successful NTE provides choice and a quality of life which is central to the motivational core of the creative industries. Historically, there has been an explicit link between 'lifestyle and creativity' in every city which has become a centre of productive culture (Hall 1999). A city needs a critical mass of provision (bars, restaurants, late-night venues etc.) and market (customers).

A successful NTE provides choice and a quality of life which is central to the motivational core of the creative industries. Historically, there has been an explicit link between 'lifestyle and creativity' in every city which has become a centre of productive culture (Hall 1999).

There are few cities in the world which can sustain a NTE without substantial numbers of city centre dwellings. Whether students, 'young professionals', artists and creatives or families and old people, a city needs to re-focus on the centre. There is a complex relationship between the supply of facilities which provide the attraction for city centre dwellers in the first place and the demand created by a resident group of consumers. City centre dwellers are attracted by a new cultural infrastructure – café bars, restaurants, lifestyle shops, galleries etc. (Zukin 1984; Wynne and O'Connor 1996).

Edinburgh is fortunate in having the existing infrastructure in terms of NTE – many of its creative residents have highlighted the range of cultural and recreational amenities within a small city as one of the core elements influencing their decision to locate in the city. The main clustering of moving image businesses though is in North Edinburgh and Leith, which have a very different flavour to Edinburgh city centre.

The recent regeneration of the North Edinburgh and Leith areas of the town have aimed to stimulate NTE alongside high specification residential developments and commercial/business premises. The infrastructure is getting there – but there is still a sense that the regenerated areas are yet to achieve the soul and ambience of a truly creative place. This is not purely an abstract notion – but also an unfulfilled commercial opportunity.

By stimulating and supporting further growth of the moving image sector within this area alongside other actions that raise the profile of the NTE, City of Edinburgh Council can help to further the success of its wider regeneration aims for the area.

It should aim to encourage a variety of small independent and specialist retailers and outlets alongside the multiples that have been successfully attracted to Ocean Terminal.

This area should also be considered for the location of the Moving Image Centre – it would establish a focal point for the moving image sector, link the existing cluster and add a critical element to the NTE in its unique exhibition, café bar, public space and in combining creative working with NTE.

### *9.6.4 Ladder of accommodation*

The city should aim to support the moving image sector along the whole ladder of accommodation. This enables:

- Pre- start up space: catering for the product/service/technology development stage often this kind of pre-incubation space is provided within an HEI, existing workplace or home
- Incubation: this is accommodation for the post start-up phase where the requirement is for small spaces with shared services and where the quality and image of the premises is less important than the costs of occupation. A variety of types of incubator have emerged including industrial/sector, university, for profit property development, for profit investment and corporate venture
- Managed /Serviced Accommodation: Edge City Centre: where the product/service/technology is developed and the business established. The business may well be interested in occupying 'own flexible space' to allow the business to respond to bring in sub contractors and collaborators to work on one off projects. Typically the business is prepared to accept longer term covenants

- Freehold/Leasehold: Own Front Door or Multi Occupied Building: City Centre/ Edge City Centre: The business wants to occupy its own long leasehold or freehold 'own front door' space likely and are more conscious of image. Longer term covenants are likely to apply.
- Business Park/Campus: company is at a fully developed product/service or technology stage and interested in standalone facilities that project the appropriate corporate image.

## 9.7 Theme 7: Moving Image Centre

The idea of a Moving Image Centre has been proposed by the Edinburgh Filmhouse and EIFF. The proposal is for a building that is a centre of entertainment and ideas and a home for Filmhouse, EIFF, the Edinburgh Film Guild and a range of related organisations.
The centre[57] would aim to:

- Act as a national centre for excellence for moving image presentations
- Act as a film media education resource
- Put on unique events and curate programmes/seasons of films
- Be a cutting edge, organic space for innovation
- Become a busy meeting place for the exchange of ideas
- Establish itself as a community and national resource for film and related art and media
- Be the home of EIFF
- House a vibrant base of digital media enterprise, innovation and entrepreneurship
- Facilitate new connections between the creative, technological, R&D, educational and community sectors
- House a film and media information centre/virtual library

In physical terms, plans include the following main elements:

- Five cinemas with between 75 and 300 seats
- Box office
- IT based library/learning/information centre
- Shop
- Café/bar
- Gallery/exhibition space
- Multi-use conference/meeting space
- Workshops for film education and making
- Production offices
- Office and meeting space for house and EIFF staff

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[57] Edinburgh International Film Festival/Filmhouse Partnership, *Moving the Partnership on – Recommendations and Framework for the Action Plan, 2003*

The reactions received from the moving image sector stakeholders to a Moving Image Centre were resoundingly positive. It is important that the focus of the centre be forward looking and multi-platform. Edinburgh is well served for cinemas so the centre would need to provide a different set of services than those already catered for through the multiple providers. The multi-platform focus would also provide a greater pull for private sector investors or sponsors such as technology companies.

The centre should aim to be a challenging and welcoming venue for a range of different audiences – reflecting both Edinburgh's citizens and visitors to the city. It should also aim to cater for Edinburgh's moving image industries – both for those businesses and organisations that take accommodation in the centre and as a central point for use by the wider business community. Thirdly, the centre should provide a physical focal point for moving image education in the city. And finally, the centre will be responsible for distributing moving image content through its own DVD label and potentially other channels.

### *9.7.1 A venue for moving image exhibition*

The emphasis should be on providing access to a range of entertaining, educative and challenging work – continuing the work that Filmhouse has done over recent years.

The centre should also continue to nurture strong links with local film-makers at professional, graduate, student and community levels and help to ensure that there is a space for screening quality local content. This is seen to have social and cultural benefits and should be supported by the relevant agencies where possible and applicable.

The centre should not look to compete with the private sector multiple cinemas – but use innovative programming and effective marketing to promote alternative films to a range of audiences. Again, this builds on the existing work that Filmhouse has achieved.

The centre should play a role in promoting media literacy amongst Edinburgh's citizens – helping them to understand the role of media in our society and giving them opportunities to experience and understand a range of media content and platforms. This could include being the venue of choice for public events on technology issues such as Digital Switchover, Digital Cinema or 3G Mobile; on content related issues such as Children's use of the Internet; online gambling; or consumer issues.

The centre would clearly need to located to attract audiences. While the Leith and Granton areas are a good choice from the point of view of being located close to the natural clustering of Moving Image businesses, other city centre locations may be more established in attracting regular audiences. A full assessment of venue location and demand would need to take place prior to the decision being made.

### *9.7.2 Serving Edinburgh's Moving Image Industries*

The research that has fed into this strategy has identified that there is considerable activity within the moving image industries in Edinburgh. Often there is a sense that the sector is smaller and less serious than its equivalent in Glasgow and that most of the National activity and support for the moving image industries is focused in Glasgow.

The Moving Image Centre concept signifies an opportunity to establish a base within Edinburgh around which the moving image industries can base themselves. It could provide some much-needed incubator accommodation for those companies that need it and accommodate key support agencies and services too.

The focus should not be limited to film or TV production, but also support digital technology companies working in relevant areas too, as well as games developers, animators or design agencies.

By attracting some of the key agencies such as Edinburgh Film Focus and Cultural Enterprise Office, the Centre could further establish itself as the first port of call for moving image related support in Edinburgh, thereby helping to satisfy the need for better information (Theme 1).

The Centre should also provide for peripatetic visiting from other moving image organisations. For example, it should be the venue of choice for PACT seminars and training – and should help to market these around its members. It could provide hot-desks and meeting rooms for Scottish Screen personnel, Skillset, The Research Centre or other affiliated organisations. It should also be the venue for broadcaster road-shows, cultural think-tanks and training courses.

### *9.7.3 A Base for Moving Image Education*

Skillset has identified a need for more CPD provision for the moving image industries, not only in Scotland but on a UK-wide basis. This was echoed in the consultations with moving image sector practitioners who were frequently required to travel to London to access relevant training.

The Moving Image Centre would be an ideal base for Moving Image education. Locating part of the Screen Academy in the Centre would be an important part of that – providing Screen Academy with the physical presence it needs, conveniently and appropriately alongside both the industry activity and the public exhibition spaces.

Moreover, the Centre could extend its own education programme – running practical production training, skills development and media appreciation programmes within purpose-built facilities and alongside the public screens.

The Centre should support interaction between local (and visiting) practitioners and arrange CPD and mentoring links between these individuals and a range of learners.

## 9.8 Theme 8: Looking Outwards, Together

### *9.8.1 Networks*

One of the over-whelming findings of the research feeding into this strategy has been that there is a good degree of moving image related activity occurring in Edinburgh. That this is something of a surprise is at least partly due to the fact that the networks linking the sector's individuals and organisations are not as strong as they could be and that communication channels have not always been made. Having said this, there are some strong links existing within the sector – many of which have been discussed early in this document.
One of the critical success factors for the moving image sector in Edinburgh is the ability to build and exploit networks.

Networks are useful for all sorts of reasons. They enhance a sense of critical mass, or identity and (for the members) of belonging. They provide useful mechanisms through which information and knowledge can be shared. They can also provide a vehicle through which groups of like-minded individuals can develop strategies for change, exert influence on policy-makers and achieve big picture change.

The early success of the First Tuesday Producer's Network is encouraging. This network, provides a forum for peer support, exchange of ideas and joint working. It also presents a useful body through which information can be channelled to the appropriate recipients.

Efforts should be made by relevant stakeholders to help support the network and keep it running and growing. It will also be important for relevant agencies to engage with producers through the network. Business Gateway, for example, can use this network as a route through which to make relevant introductions and to ensure their services meet the needs of the sector as can the Cultural Enterprise Office.

The producers' network is a promising first step but needs to be nurtured and supported for it to evolve its role and continue its usefulness. The network should aim to increase its profile so that it can attract high-level industry guests – providing members with useful development opportunities – and so that it becomes known as the place to come to get in touch with Edinburgh producers. The network could also grow its role in different ways: by supporting the skills development of its members or by helping to distribute local content (perhaps in conjunction with Filmhouse). The network's members can themselves provide useful peer support and mentoring within and between the group.

Beyond the producers, there is a need for networking opportunities for those involved in the other areas of moving image – for example, helping the Studios and facilities providers to promote themselves. A multi-disciplinary network of interest in moving image would be a valuable next step and would encourage innovation, interaction between a diverse membership, collaborations, opportunities for technologist to try new content and for content developers to test new platforms and technologies.

In addition to further face to face networking the steering group could also consider how a newsletter or news/information portal can be developed to support information sharing and the growth of collaboration across the different facets of the moving image sector. Potentially, this could be the publication or resource of the Moving Image Centre.

### *9.8.2 Connections*

Edinburgh cannot operate in isolation but it can maximise the impact of building on its existing strengths – positioning itself as one of the key cities for moving image in the UK.

Edinburgh should, however, also build on links with other cities within Scotland and further afield.

**Within Scotland**

Many of the respondents to our research identified that Glasgow has more facilities and support and a more developed moving image sector than Edinburgh. Where this is the case, individuals within the Edinburgh sector should look to benefit from Edinburgh's close proximity to Glasgow and get involved.

Building towards an organised and vocal Edinburgh contingent at Glasgow-based events will build the strength of Edinburgh to attract its own events. Taking trade missions to Glasgow to visit the broadcasters will give an impression of critical mass and show the extent of the creativity that they would be missing by not considering Edinburgh businesses. With trains to Glasgow leaving Edinburgh every 15 minutes for a 50 minute train journey, there can be no excuse for not getting involved in those events, initiatives and with those contacts that are open beyond Glasgow companies but that are currently Glasgow-dominated.

Scotland is relatively well served for support agencies that have relevance to the moving image. The country is not large enough to sustain separate moving image sectors within each city. It makes more sense to take a combined approach in some areas. For example, locations – the cities and rural areas of Scotland all have quite separate and unique qualities – the emphasis should shift from promoting the individual cities and areas as locations – to a combined or collaborative effort in which elements of Scotland as a whole are marketed. Marketed together in this way, Scotland presents a rich variety of rural and urban settings that will be of interest to film-makers. This is partly how Scottish Screen operates – but we need to push for better mechanisms between the local film offices (such as Edinburgh Film Focus) and Scottish Screen as the centralised resource.

**Beyond Scotland**

By building connections with other cities, Edinburgh can build its reputation as one of the leading cities for moving image. This could be through educational exchanges or attracting international students to Edinburgh's institutions. Or it could be through joint film festival type initiatives or through continuation and further development of distribution networks such as DocSpace.

Where there are interesting collaborations forming, particularly those with relevance to Edinburgh's strengths in education, innovation and exhibition or in documentary, animation or advertising, Edinburgh should be looking to take a prominent role. This may also extend to Edinburgh positioning itself as a key location for academic or industry conferences – for example, focussing on advertising or informatics.

This will not only cement Edinburgh's position as a key player in these areas of moving image, but will also allow individuals within Edinburgh's moving image sector to experience and connect with a broader set of international contacts.

To this end, the moving image sector should be looking at feeding into the wider branding of Edinburgh, the city – by co-ordinating with the city's re-branding exercise.

### *9.8.3 Combining forces*

Where possible the stakeholders involved in the moving image sector should look to combine forces, thereby benefiting from economies of scale and from a sense of "critical mass". There will, of course, be times when companies at one particular stage of the value chain will be in competition against each other – but more times when they can benefit through combining forces.

Much of this strategy is about ways in which collaboration across the sector can be approached. In summary, these include:

- Sharing equipment amongst the private and academic sectors
- Joint procurement of equipment
- Sharing talent
- Working together on larger projects
- Multi-disciplinary academic interest groups
- Marketing and promotion
- Interfacing with other initiatives

# 10 OWNERSHIP AND GOVERNANCE

It is important to establish roles and responsibilities for implementing the various elements of the strategy.

The steering group as it currently stands is a useful starting point.

It is recommended that a Managing Board is set up to be responsible for the overall implementation of the Moving Image Strategy. This Board would be made up of key members of the existing steering group – including representatives from:

- City of Edinburgh Council
- Scottish Enterprise Edinburgh and Lothian
- Scottish Screen
- Key community organisations
- HE
- Production sector
- The Filmhouse and EIFF
- Event Scotland

It would also be useful, without extending the group too far and making it unwieldy, to add representation from:

- The University of Edinburgh Department of Informatics – who registered a particular interest in the strategy
- Technology companies – such as Sony or NTL/Virgin
- FE – which plays a significant role in moving image education in the city
- The TV Festival (which although based in London is one of the city's key Moving Image sector events) and/or EIEF

6.3 This would be a strategic body with a remit that would have three strands:

- sourcing and securing public sector funding (local, national and European)
- communicating and co-ordinating with those organisations that are actually involved with practical implementation
- Monitoring and evaluating delivery performance of the sector and its support agencies.

The adoption of this strategic governing body will ensure that delivery organisations can be allocated sufficient funding over an agreed period then be set clear targets for measurement of success or failure.

The Board would also be responsible for the promotion of Edinburgh's image as having a quality of life that makes it an attractive place to live and work both for inward investment purposes and for graduate retention and as a location uniquely associated with moving image.

**nmp Ltd.** believe that these initiatives will achieve a further, cross cutting objective that has surfaced very strongly throughout the consultation process, which is to develop the attractiveness of the industry in order to attract and retain skilled and knowledgeable workers, irrespective of where they are trained and currently located.

## Appendix 1

## Mapping of Moving Image Businesses in Edinburgh

| Company Name | Value Chain | Category | Contact Person | Summary of Activities |
|---|---|---|---|---|
| 1 Step 2 Production | Production | Production Company | Ainsley Law | A 1-stop production house. Environmental/ethical banking and work practices. Recent clients include: Red Bull, SEPA, Borders Council, Scottish National Heritage, Tweed Forum, Forestry Commission, Bank of Scotland, Pyro One, Unique Events. |
| 20/20 Productions Europe Ltd | Production | Production Company | Alastair Scott, Fiona Bell | A creative corporate communications specialist providing design and graphics, multi-media and web design, corporate video production, 3D computer animation, technical staging and production management, presentation creation and event management |
| 4 x 4 Hire Scotland Ltd | Facilities | Equipment hire | | Self-drive hire of Landrovers, Range-rovers & other 4x4, Mercedes MLS, 3,5,7, 9 Seaters vehicles incl delivery, collection & insurance |
| 41 Management | Facilities | Casting Agents | | Personal management for actors in all media |
| 60 Watt Ltd | Advertising | Advertising | | |
| A & A Studios Ltd | Facilities | Facilities (Costume) | George Theurer | Wigs, beards and moustaches for sale and hire. Wigs etc restyled and serviced. Make-up - Grimas Distributors for the UK. Very large stock. |
| A Slight Shift | Production | Production Company | Michael Wolchover | |
| A&M Photographic | Post-Production | Editing | | Editing |
| Abby Warrilow | Professional support service | Freelancer | Abby Warrilow | Choreographer |
| Action Classics | Facilities | Locations | | Locations for film, movies & photography. We specialise in the preservation and development of historic & interesting buildings. Please see our website for available locations & more information on our vehicles & vessels. |
| Admedica | Advertising | Advertising | | |

| | | | | |
|---|---|---|---|---|
| Alan Mason | Facilities | Freelancer | Alan Mason | Experienced hired hand. Has worked on a diverse range of animation and design projects, including feature films, commercials, TV series, exhibitions, promotional trailers etc. Credits include: Silent Scream. Clients: Scottish Television, Labour Party, Edinburgh Festival. |
| Albion Archive | Content | Archive | Brian Lambie | Vast archive of Albion records, photographs, minute books, job sheets, service manuals, spare lists, as well as being actively involved in the restoration of a number of vehicles. Vehicle hire (1902 - 1940's). |
| Alex Broad | Production | Freelancer | Alex Broad | Editor |
| Alex Gillon | Education | Freelancer | Alex Gillon | Experienced in all aspects of voice/speechwork coaching. Specialising in accent/dialect coaching for film, television and theatre. |
| Alexander Lawrie | Facilities | Facilities (Lighting) | Alex Lile, Ed Thomson | Lighting for film, TV, conference and stage. Equipment, transport and enthusiastic sparks. BBC-trained - many years' experience in documentaries and current affairs. Tape, film or live TV. Lighting kits, consumables and transport |
| Alexis Kae's Costume Emporium | Facilities | Facilities (Costume) | | 22 years as a Costumier to the Entertainment Industry |
| Alexis Kae's Costume Emporium | Facilities | Equipment hire | Kirsten Phillip | Costume/fancy dress hire shop. Over 1000 costumes in stock. Children's hire section, make-up and wigs also available for sale. Open Saturday's 09.00 - 11.00. |
| Alison Campbell | Production | Freelancer | Alison Campbell | Production coordinator |
| Alison Mitchell | Professional support service | Freelancer | Alison Mitchell | M.Des qualified costume designer/design assistant with experience in film, television and commercials. Bases in Edinburgh and London. Feature film credits include: Greyfriars Bobby, Wild Country, Blinded. Short film credits include: IM, The Choir, Sredni Vashtar, Cry for Bobo. TV: Shoebox Zoo Credit's as costume assistant include: Spider, Tomb raider, The Little Vampire. full cv available to view online at www.pfd.co.uk |

| | | | | |
|---|---|---|---|---|
| Alison Sneddon | Professional support service | Freelancer | Alison Sneddon | Art Department Assistant |
| Allan Brereton | Facilities | Freelancer | Allan Brereton | Sound Recordist |
| Am Bocsa Ltd | Content | Animation | Catriona Black | Am Bocsa makes Gaelic animation |
| Amalie Harper Gow | Facilities | Freelancer | Amalie Harper Gow | |
| Amber Parsons | Production | Freelancer | | Production Manager, CBFM Investor Relations (RBS, 2005) Production Manager Direct Line FMP (RBS, 2005) Producer, When I'm Sixty Four (Better Days/Triptych Festival 2005), Producer, Cotopaxi (GMAC/Digicult 2004), Production Co-ordinator for "Paris: Bon Voyage" (2004 Edinburgh Mediabase for Channel 4), Production Co-ordinator "Paris: Rendez-vous" (2004 Edinburgh Mediabase for Channel 4), Production Co-ordinator "Paris: Trompe L'Oeil" (2004 Edinburgh Mediabase for Channel 4), Production Co-ordinator "Paris: Cherchez la Femme" (2004 Edinburgh Mediabase for Channel 4), Location Assistant "St. M |
| Amy Hardie | Production | Freelancer | Amy Hardie | Award winning documentary Director. BBC, Channel 4, STV, Prime Time Documentaries. Received Creative Scotland Award 2001 for feature documentary. Founded Docspace, new documentary distribution capability for Scotland and co-created CinemaNet Europe, a pan European digital cinema strategy. |
| Analysis Lost Productions | Production | Production Company | Colin Perry | Analysis Lost is a young production outfit based in Edinburgh. The company operates as an incubator company, developing and nurturing own ideas and scripts for film and television. A track record in commercial and corporate production has been transferred to a sister company Those Media Guys Ltd, allowing Analysis Lost to concentrate on independent endeavours. The company has a slate of diverse projects at various stages of |

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|---|---|---|---|---|
| | | | | development, and are working towards activating and realising those projects most viable and most promising. |
| Arc Facilities | Post-Production | Editing | Brian Suttie | Lovely light edit facility, including 4 x Avids with the latest Adrenaline Media Composers, Quantel Editbox, MPEG and web encoding and DVD authoring. Recent credits: Shoe Box Shoe, Adoption Stories, Mapman, Songs of Praise, MTV and many more. |
| Arts and Media Catering | Professional support service | Support Services | Chris Chirnside/Paul McLeman | Arts and Media Catering specialise in wrap party and film premiere catering and design. Past credits include European premier of "Braveheart" at Stirling Castle, "Primary Colours" dinner at the Royal Museum and the premiere of "Entrapment" at Prestonfield House. |
| Ashley Beaton | Facilities | Make Up Artist | Ashley Beaton | I am a professionally trained hair and make-up artist with four years experience and have worked for Christian Dior for two years. I am based in Edinburgh and Glasgow doing freelance and working for another large make-up brand. |
| Assia | Advertising | Advertising | | |
| Asylum Pictures Ltd | Production | Production Company | Robin MacPherson, Paul Kenny | Asylum Pictures specialises in documentary and drama-documentary with an international edge. Keen to co-produce, our films span arts, history and politics for broadcasters in Scotland, Ireland, France, Finland and Italy. 2004 productions: Rebel Frontier (Scottish Screen/Irish Film Board/ RTE/YLE), This Scotland: Tree Fellers (Scottish Screen/Scottish/Grampian TV). |
| Attacat | Advertising | Advertising | | IT and web design |
| Audio Light Systems | Facilities | Facilities (Lighting) | | Supply and installation of Audio, Lighting and AV Systems for Theatres, Places of Worship and everywhere people and objects need to be seen and heard |

| | | | | |
|---|---|---|---|---|
| Avonbridge Film Production Company Ltd. | Production | Production Company | Penny Thomson | Established production company with extensive international background. Co-productions and Scottish production facilitation work especially welcomed. Also specialising in English colloquialisation of translated foreign language scripts |
| Aztec Production | Production | Production Company | Steve McClean | Offering a full range of production services (filming, editing, production management) |
| B Scenic Construction | Facilities | Set building | | B Scenic Construction is an established design and set building company based in Edinburgh – serving Scotland. B Scenic provides competitive solutions to all construction needs. Based in Leith and currently in the process of moving to a larger workshop - the company promotes the ability to create and build anything from an elaborate film set to a commercial interior or from basic studio flats to conference stage sets and exhibitions. |
| Battle Orders Scotland Ltd | Facilities | Facilities (Costume) | Angus Neilson | Reproduction arms and armour from all periods ancient to modern. Martial arts equipment, tuition and advice. Blank firing weapons. Scottish, European and Oriental weapons a speciality - delivery anywhere UK and international |
| Beaver Waste Management | Facilities | Transportation | James Cunningham | Skips of all sizes for hire. Registered waste carriers. |
| Black Bear Productions Ltd | Production | Production Company | Nicolas Radcliffe | Factual television for broadcast and business |
| Black Light Ltd | Facilities | Facilities (Lighting) | | We are an independent specialist lighting company based in Scotland, UK. We supply lighting to theatre, exhibitions, conferences, tradeshows, heritage centres and much more. We can offer lighting, staging, trussing and sound for hire sale or installation. |
| Blue Wonder Films | Production | | Cathrine Aitken | Film and television producer. Just produced feature film, Afterlife (starring Kevin McKidd, Lindsay Duncan and Shirley Henderson), which will be released on August 13 throughout the UK |

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| BMMedia | Production | Animation | Bob Marshall | BMMedia is a specialist developer of professional quality video-led marketing tools for the internet, events, exhibitions, kiosk, CD and DVD ROM |
| Bond Advertising Etc Ltd | Advertising | Advertising | | |
| Bottle Top Graphics | Content | Graphics | | Broadcast, commercial and corporate graphics 2D and 3D animation - illustration - DVD Interface Design and authoring. |
| Britannia Coach and Truck Park | Facilities | Agency drivers | | Coach park and driving agency |
| Cadies Productions Ltd | Production | Production Company | Robin Mitchell | Drama and documentaries. Most recent production: 'Dreams Are Not Enough', (25-min drama / 2005) Also 'The Rest is Silence' (10-min documentary for the cinema/ 2005) and 'And So Goodbye' (24-min documentary, Winner of Saltire Society Grierson award at EIFF 2004). Currently working on a film about Scottish Artist and Illustrator 'Willie McLaren'. |
| Cagoule Productions | Production | Production Company | Lewis Gourlay | Commercials, corporate and music video. Full in house post production facilities. Visit www.cagouleproductions.tv for more information. |
| Calumet Edinburgh | Facilities | Equipment hire | Vanessa Cox | International company which has been serving professional photographers' equipment requirements for nearly 70 years. Monday-Friday 9 am-5.30 pm |
| Cameo Cinema | Exhibition | Cinema | Diane Henderson | Three-screen arthouse cinema available for private or cast & crew screenings. 35mm and 16mm facilities. Seating capacity: Screen 1 - 253, Screen 2 - 75, Screen 3 - 66. |
| Campaign Hq | Advertising | Advertising | | |
| Canongate Model Management | Facilities | casting Agents | Shona Campbell | A vibrant new model agency providing a wide range of models. All ages, shapes and sizes for Photographic, Catwalk, Advertising, Film and television work. Enterprising an exciting new company, Shona Campbell is combining an in depth knowledge of the modeling industry with a fresh new vision to bring you an original and diverse portfolio |

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| Canongate Studios | Facilities | Facilities (Sound) | | |
| Carlina Draught Worldwide | Advertising | Advertising | | |
| Carnival Chaos | Professional support service | Multimedia | | Edinburgh based design studio. Props and model making for film, television, theatre, events, festivals. Fabric work + draping, signage, graphic work + illustration |
| Caroline Bond | Professional support service | Support Services | | Production accountant on Hububb and The Elaine Show (BBC Scotland). Specialist in business and personal tax. |
| Caspian Production | Production | Production Company | Nigel Harper | |
| Cineworld | Exhibition | Cinema | Chris Murchison | 12-screen multiplex cinema - disabled access - air conditioning. Available for private hire. |
| Citigatesmarts | Advertising | Advertising | | |
| Clouds Animation | Professional support service | Accommodation | | Short term Edinburgh properties available for let to cast, crew etc. From 3* to 5* deluxe quality. Past credits include: Little Vampire, Shoebox Zoo, Festival, Rebus, Summer Solstice, BBC BAFTA |
| Coconut Dog | Production | Production Company | Sheena Wichary | We plan to merge film-making with art, movement and design |
| Connie Fairbairn | Facilities | Facilities (Costume) | Connie Fairbairn | Costume Designer specialising in corsetry, structural creations and props |
| Cool Billboards Ltd | Advertising | Advertising | | |
| Coolbillboards | Advertising | Advertising | | |
| Cormorant Productions & Films Ltd | Production | Production Company | Christine Winford | Documentary, drama and features. |
| Courtyard Antique Prop Hire | Facilities | Equipment hire | | Large selection of unusual items for hire for film, TV and theatre. Militaria, toys, models, furniture, kitchenalia, household items, paintings. Credits: Monarch of The Glen, Life of J.M. Barrie, History of Beatrix Potter, Shoebox Zoo, Woman in Winter, Summer Solstice, Edinburgh Festival. |
| Cowan & Partners Chartered Accountants | Professional support service | Support Services | | Accountant |
| Creative Direct Ltd | Advertising | Advertising | | |
| Crystal Media | Post-Production | Editing | Philip William | Off-lining, voice-over and sound in cutting edge non-linear suites. Wet |

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| | | | | and dry hire. |
| CSBS Ltd | Facilities | Facilities (Sound) | | Audio facilities for live and recorded radio and television. CD recording, editing and mastering at our studio near Edinburgh or at a location of your choice. |
| David Hepburn Watson | Content | Music | | Composer of music for media and performance |
| Delta Video Productions Ltd | Facilities | Facilities | Ian Ferguson | Delta Video Edinburgh specialise in offering audio-visual installations that are tailor made to customer requirements. Since 1993 Delta Video have worked for a broad range of clients including Local Authorities, Schools, Colleges and Universities, Theatres, Galleries, Pubs, Shops, Night Clubs, Festivals, Conference Venues, Commercial organisations and Public Service bodies. Our visual communication services range from hiring out portable projection equipment to fitting out entire corporate facilities such as Scottish Powers Training Centre. |
| Denise Borland | Education | Training | Denise Borland | Specialising in the training of children, young adults and adults for all aspects of TV, film, stage and popular music work. |
| Devlin Morris Productions Ltd | Production | Production Company | Morris Paton, Vivien Devlin | A media production house specialising in international arts strands across radio, televison, video, theatre and journalism. The company offers 30 years experience in theatre, writing and broadcasting, including 15 years BBC production. |
| Digital Face Productions | Production | Production Company | Collin Gilchrist | Digital Face Productions (DFP) creates cutting edge video & animation for global businesses |
| Django Animation | Production | | Sylvain Chomet | |
| Dominion Cinema | Exhibition | Cinema | Mr A. M. Cameron | The Dominion Cinema is an independent, family-run three-screen theatre. The distinctive thirties styling can still be seen on the outside, however the interior has been used to best effect. Licensed bar and restaurant |

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| Driver Hire Nationwide | Facilities | Transportation | | Driver Hire Edinburgh City can provide temporary drivers through out SE Scotland. All types of drivers can be sourced Class C and Class C & E through to multidrop, chauffeurs and fork lift truck drivers. |
| Edinburgh College of Art | Education | Training | Noe Mendelle | School of Visual Communications, Centre for Visual and Cultural Studies |
| Edinburgh Corn Exchange | Production | Studio | Paul Demarco | Large soundproof building, situated on 9 acre site close to centre of Edinburgh |
| Edinburgh Film Studios | Production | Studio | Mitch | 1450 square feet, vehicle access, U-shaped cove, lighting grid @ 15ft, 300A 3-Phase Power, Sound proofed, 30 mins from city centre, extensive parking, production office. |
| Edinburgh's Telford College | Education | Training | | |
| Edmonds Advertising | Advertising | Advertising | | |
| Ernie Nicholls | Advertising | Advertising | Ernie Nicholls | Media Services Radio and TV publishers |
| Estates Gazette Advertising | Advertising | Advertising | | |
| ETH Screen Music | Content | Music | Harald Tobermann | Producers and publishers of original music for moving images. Complete creative team: composers/arrangers, musicians. All styles and genres. |
| Extra Veg Crews | Facilities | Facilities (Camera) | Paul Gavin, Cindy Thomson | Supplying crews in Scotland for BBC, MTV, Granada, Carlton, Endemol, Zenith, Talkback, Lion, ITN, Aspect, Rockstar, Sunset & Vine, European Parliament, Einstein, CTV Canada, Mentorn, BSkyB, Discovery, Sci-Fi, Disney, NHK, E! Entertainment, NBC, ABC (USA), ABC Australia and many more. HiDef, Digibeta, DVCam, SP (PAL & NTSC), 35/ 16mm. |
| Factotum Property Services | Professional support service | Accommodation | | Factotum specialises in short term lets all year round. We find accommodation for performers, organisers and the media for the Edinburgh International Festival and locations and appartments for TV and film companies throughout the year. "Always Accommodating: Past credits: "Little Vampire" ABK Productions Ltd, "Sword of Honour" |

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| | | | | Talkback Productions, "Inspector Rebus" Clerkenwell Films |
| Family Advertising | Advertising | Advertising | | |
| Feather Brooksbank | Advertising | Advertising | | |
| Filmhouse | Exhibition | Cinema | Rod White | Hire cinemas for viewing, previews, cast and crew screenings. Cinema 1 - 280 seats/2 wheelchair spaces Cinema 2 - 97 seats/wheelchair space, Cinema 3 - 72 seats. 70mm / 35mm / 16mm / Super 16mm / U-Matic / Beta / SVHS / VHS. Three-screen 'art house' cinema and home to the Edinburgh International Film Festival. |
| Finiflex | Facilities | Facilities (Sound) | | Finiflex provide Facilities and Services for Film, Television, Radio, Corporate, Multimedia and Audiovisual productions. Synchronised Audio Post Production in Surround Sound ? Sound Design, Sound Effects and Foley Recording ? Original Music Composition, Editing and Production Voice-over Recording, ADR, ISDN. |
| Fisher Productions | Facilities | Facilities (Lighting) | | Fisher Productions specialises in creative lighting, sound and staging techniques for the events industry. Working extensively with the Edinburgh Film Festival we've worked at many wrap and premier parties including Shrek, Motorcycle Diaries and Stage Beauty. |
| Forth FM | Content | Music | | Music library and sound effects library - rates negotiable. |
| Fourway Pictures | | | Mark Cousins | |
| Freakworks | Post-Production | Editing | | Film, television & multi-media post-production, direction and design. Wet or dry hire suites. Award winning editors. |
| Freakworks Studios | Production | Studio | | Drive-in 102 sq.m. with infinity cove, lighting rig. Office suite, green room, wardrobe/make-up room, shower and kitchen. Dry hire for film and photographic shoots. Editing and sound facilities also available. |

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| Freedonia Films | Production | Production Company | Jim Hickey | Producer - "Hunger Artist" (Short), "Daybreak" (Feature), "Our Own Place",(Feature in dev), "John Logie Baird - The Man Who Saw The Future (Documentary). Co-Producer - "Frozen" (Feature), "House in Berlin" (Feature in dev). "One With Everything" (Short). |
| Gate Films | Production | Production Company | | A commercial production company with offices in Edinburgh, Manchester & London. Short films also directed and produced |
| Georgian Antiques | Facilities | Equipment hire | | antiques available for hire in Scotland. Both furniture and the small and unusual. |
| Greenroom Films | Production | Production Company | Katie Cullen | Production company |
| Hammerhead TV | Facilities | Facilities (Camera) | | Hi-Def, XD Cam, Digibeta, SX, SP, DV Cam, MiniDV kits with or without crews. Many extras: Mini-cams, sound, lights and grip. Offices around the UK offering Nationwide service and technical support. |
| Hand Pict Productions | Production | Production Company | George Cathro | Broadcast production company specialising in music, the arts, documentary and DV production: The Nymph, The Booby and The Seven Lame Ducks (1x30' BBC Scotland), Warhol on Warhol (1x50' Five), Adoption Stories (6 x 30' BBC Scotland), Big Day (8x30' BBC Scotland), From Paisley to the Palace - Artworks Scotland (1x30' BBC2 Scotland), |
| Harbour Point Studio Space | Production | Studio | Iain Mercer | Harbour Point is situated in Musselburgh, only a 15 minute drive from the City Centre. The space we have available was originally designed for office use but is currently lying empty. It has open curved lattice beams, strong enough to support additional lights/ equipment/curtains. We currently have two units available at 4,700 sq. ft. and 2,800 sq. ft. This quirky, loft space is light and airy with good sound proofing and double glazed window units. There is a flexible grid network of floor boxes, ample car parking facilities and lift access. |

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| Hay Smith Advertising Ltd | Advertising | Advertising | | |
| Head Fire | Content | Multimedia | | Head Fire specialise in CG and Flash animation for broadcast, commercials, film and web. We deliver high quality, imaginative animation catering to your needs. Motion graphics, compositing, special effects. Animated web content, web site design, interactive games and banners. Music videos, commercials and corporate presentation. |
| Heehaw Productions | Production | Production Company | Steve Hendry | Heehaw Productions is an award-winning team that produces dynamic video content for a range of projects for our multimedia and publishing divisions, and offers in-house filming, editing, creative development and other post-production services. In addition, Heehaw Productions has produced a number of short-films and advertisements for television and cinema broadcast. |
| Heriot Advertising | Advertising | Advertising | | |
| Iaim Forsyth Rostrum Camera | Facilities | Facilities (Camera) | | Fully featured 5-8 axis rostrum for products, models, and artwork, transportable if required. Millennium Software and rigid construction ensure smooth, repeatable moves every time. Timecode triggering ideal for traveling matte and multiple pass work. |
| iFrame Media Ltd | Production | Production Company | John Donaldson | iFrame Media specialize in productions for clients that have fixed and limited budgets for corporate and advertising needs |
| Integrated Marketing & Media Solutions | Advertising | Advertising | | |
| Intermedia Europe | Advertising | Advertising | | |
| Jarvie Plant Hire | Facilities | Equipment hire | | Access platforms, generators, forklifts, mobile lighting and much more |
| Jewel & Esk Valley College | Education | Training | Ron Mackay | Specialise in training and pubic bodies video. Past clients include SQA, East Lothian District Council, Edinburgh City Council. Facilities include DVpro 16:9, Sadie, Non-Lin |

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| John Brown Cater Hire & Events (John Brown Caterhire Ltd) | Facilities | Equipment hire | | Hirers of a wide range of Tables, Chairs, Dance Floors, Kitchen Equipment, Cutlery, Crockery, Glassware, Bar Equipment & Linen. Delivery throughout Scotland and the North of England. |
| Kevan Shaw Lighting Design | Facilities | Facilities (lighting) | | Experience in broadcast and industrial lighting. Credits include: Channel 4 (ECT) World Music Video Awards (MTV), RPM (BBC). Also effects lighting for commercials etc. Multi-camera, studio and OB experience. |
| Ko Lik Films Ltd | Content | Animation | Cameron Fraser | Animaion Studio |
| LA Media Ltd | Production | Production Company | | Broadcast: events: corporate: commercials: consultancy: virtual tours: CD Rom & DVD Production |
| Laurie Templar Knight | Advertising | Advertising | | |
| Lauriston Place | Post-Production | | Edinburgh | BA (Hons) courses in film/TV and animation. Postgraduate diploma/masters degree courses available. Studio and post production facilities available July to October including unique views of Edinburgh Castle as a backdrop. |
| Liberty Films Ltd | Production | Production Company | Alexander Ross | Liberty Films create cinematic works of a theatrical and documentary nature which intend to aid or increase the awareness of health, social or environmental concerns within contemporary society. Credits: E= 1x14 mins - Short film (2005). A short period drama concerning the specific learning difficulties of Albert Einstein; creating awareness of dyslexia by highlighting the paradoxical nature of specific learning difficulties. |
| Livewires Casting Agency | Facilities | Casting Agents | Fran Holmes, Pam Wardell | Children and young adults specialising in radio, TV, films, commercials, presenters. Coaching and rehearsal of children off set/on set. All your media needs. |

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| Lothian Bus Consortium | Facilities | Equipment hire | John Fallon, Club Convenor | Large collection of restored, working old Edinburgh buses and trucks, plus bus stops, uniforms and other transport props. 1948-1988 can be recreated. Credits: "The Auld Alliance" BBC2, "Looking After Jo Jo" BBC2, "Crimewatch" BBC1. |
| Macdonald Academy of Arms | Education | Training | Paul Macdonald | Fight direction for stage and screen specialising in swords and edged weapons use. Historically accurate, dramatic, realistic or purely theatrical, all styles and weapons forms catered for. Registered fight director with Art Of Combat and The Independent Fight Directors Guild. Also Armourer, Swordmaker, Props, Propmaker. Previous customers include: Shakespeares Globe Theatre, Royal Lyceum Theatre, Fife Museums. |
| Makar Productions | Production | Production Company | Eddie Dick | Production Company |
| Marketing Concepts Ltd | Advertising | Advertising | | Media Education has worked with organisations across the UK, providing greater access to the media through expressive arts, radio, video and multimedia. The company aims to assist participants in creating media content that expresses their own views and opinions in a way which is both creative and empowering. |
| Marquisde Ltd | Production | Production Company | Ian Waugh | |
| McCabes | Professional support service | Support Services | | Financial services |
| MCL Edinburgh | Facilities | Equipment hire | Darren Coutts, Ken Robertson | As part of the Avesco PLC group of companies, MCL Edinburgh has access to a full range of broadcast hire and large screen projection equipment. Combined with the in-house support to deliver dynamic technical solutions, other companies within the group include: Presteigne Broadcast Hire, Creative Technology Outside Broadcast, Screenco and Dimension Audio. Supply Sony D35's with Triaxial backends, DV backends and Beta backends. |

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| McMillen Stage Costume | Facilities | Facilities (Costume) | Olive McMillen | Full wardrobes for musicals, plays, operas. 5,000 costumes in stock. Large selection of fancy dress costumes, wigs and footwear available. Costumes also available at our Glasgow branch. By appointment Mon - Fri 10.00 - 16.00 Sat 10.00 - 14.00 |
| McNivensent Music | Content | Music | David McNiven | Composing and recording theme and incidental music for television and films. Working to picture/timecode/DAT mastering. Credits include: "Sweet Fanny Adams", Hogmanay Millennium Website (1.2 million hits), "The Baldy Man 2", "Rab C. Nesbitt", "Naked Video", "Athletico Partick". |
| Media Eduction Ltd | Education | Training | Iain Shaw | |
| Mediasport | Production | Production Company | Graeme Chalmers | Production company specialising in extreme and adventure sport. Production solutions and logistics, Broadcast Management, Crewing, Consultancy. Credits include: "Extreme Lives" (BBC1), "Ski Sunday" (BBC2), "Out Of It" (Rapture), "King Of The Hill" (KNBC, New York), "4810" (feature film set on Mont Blanc), "BUSC" (snowboard/ski competition series), "Base Scotland" (Base jumping film set in Scotland). |
| Menzies & Young Ltd | Advertising | Advertising | | |
| Metro Ecosse | Facilities | Facilities (Studio Projection) | | Metro Ecosse supply the highest quality audiovisual equipment and services to our clients. Wide range of high brightness projectors, 40", 50", and 61" plasma screens, latest video wall technology and on-site technical support. |
| Michael Scott-Law | Facilities | Stunt Provision | | Action sequence consultant. Fully qualified co-ordinator and performer (official equity stunt register). All relevant insurance held. Comprehensive risk assessments undertaken. Experienced in supervising actors action scenes. Excellent references for completed productions. Scottish projects given |

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| Mirage TV Productions | Post-Production | Editing | Yvonne Goodfellow, Douglas Bogie-Gray | Digital editing & SFX- Discreet. Digi-Beta, Beta SP. Graphic design, 2D & 3D animation. Video CD & interactive authoring. M-Peg, QuickTime, AVI. Small studio, Chromakey, autocue. Location kit, crews and steadicam. |
| Mobile Bill-Board | Advertising | Advertising | | |
| Modelrange | Facilities | Equipment hire | | We have a variety of vehicles in original condition from a 1932 Rolls Royce Saloon to a Nissan Skyline. Edinburgh based, all cars can be viewed either on our website or by appointment. |
| Moondust Media | Production | Production Company | Hannah Woolfson, Ian Murray | Specialists in live event production. From screen feeds, live multi-camera mixes and event management, to event showreel production, DVD authoring, web and graphic design. |
| MOONSTONE INTERNATIONAL | Education | Training | | Moonstone provides training and development opportunities through advanced workshops for emerging feature filmmakers and writers in consultation with The Sundance Institute. |
| Mothcatcher Productions Ltd | Production | Production Company | Kerry Mullaney | Provides a full range of production and post-production services. Services include: Producing, Assistant Directing, Cinematography, Casting of small productions, Editing of projects up to 60 minutes (inc actor's showreels), Post Production including colour grading, DVD authoring and duplication from VHS / Mini DV. Eqpt : Canon XL2, Arri lighting, editing/ post production facilities, inc Media 100, Premiere, VEGAS, AE. |
| Mrw Consultants | Advertising | Advertising | | |
| Muckle Hen Productions | Production | Production Company | Shona Donaldson, Carol Rutherford | Muckle Hen's award winning team have built up a reputation for producing high quality, cinematic productions across the board. Corporate, commercial, broadcast & events. |

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| Natalie Scheff | Production | Production Company | Natalie Scheff | Full Production Services, Producer and Line Producer |
| Navigator Responsive Advertising Ltd | Advertising | Advertising | | |
| New Haven Communications Ltd | Advertising | Advertising | | |
| Nobles Gates | Production | Production Company | Russell Leven and Andrew Abbott | Producers of high quality TV documentaries with a film related theme |
| Odeon Edinburgh Lothian Road | Exhibition | Cinema | | |
| Odeon Edinburgh Wester Hailes | Exhibition | Cinema | | |
| Odeon Fort Kinnaird | Exhibition | Cinema | | |
| Only U | Advertising | Advertising | | |
| Openhand Film & Video Production | Production | Production Company | Sitar Rose | Social documentary production, principally concerned with the creative arts, environmental and health issues. |
| Oscus Media | Production | Production Company | John Williams, Nicolas Williams, Diane Williams | Oscus Media was formed after the closure of Pathway Media. Oscus specialises in the production of religious, educational and music programming. Delivery on Multi-format platforms: video/ DVD / Audio / media streaming. Experience in both single and Multi camera production. Conference planning and staging. Media Training. |
| PLA (Pat Lovett Associates) | Facilities | Casting Agents | | Longest established Scottish agency with offices also in London, representing actors, voice-over artistes and walk-ons in all media |
| Plum Films | Production | Production Company | Tina Foster, Micky McPherson | Ads and films |
| PROPULSION UK | Content | Graphics | | Supply of computer graphics and prop graphics as well as a wide range of computers and equipment. |
| PRS (Performing Right Society Ltd) | Trade Body | Trade body | | |
| PS Communications | Professional support service | Support Services | Denis Robertson Sullivan / Tracey | Media Awareness Trainers, Communication Specialist (Internal and external), campaigning and business support and PR strategies. |

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| Quadrille Media Ltd | Production | Multimedia | | Video and Audio streaming. File generation for multimedia and internet. Hardware and software MPEG1, MPEG2 and MPEG4 encoding. CD & DVD duplication and replication. Full printing, packaging and distribution service. |
| Red Kite Animation | Production | Production Company | Sueann Smith, Ken Anderson | Red Kite is an experienced producer of animation for commercials, shorts and series using 2D, CGI and Flash. Currently developing TV series and features. |
| Red Point Productions | Production | Production Company | | Recently directed films for KPMG, Tescos, BT as well as shooting and directing 2 documentary features for National Geographic. Efficient, easygoing and experienced! |
| Red Zebra Productions | Production | Production Company | Steve MacKay | Corporate & broadcast video production. Documentaries, music & wildlife |
| Redroof Studios | Production | Studio | | 2000 sq.ft., 1600 sq.ft. stage, 600 amp supply, prod office, green room, kitchen, 26ft x 26ft grid, infinity cove, set construction, set design, model making, SFX, parking, drive-in, drapes, chromakey, crew. |
| Rennie Mitchell | Advertising | Advertising | | |
| Republic Productions Ltd | Production | Production Company | Marnie Anderson | Corporate, ads, broadcast |
| Richard Steel | Facilities | Steadicam | | Master series owner/operator. Dramas, features, broadcast & corporte. |
| Rock Steady Security Ltd | Facilities | Support Services | Fred Cucchi or Karen McFetters | Professional and reliable services at a competitive price since 1980. Leaders in security, safety and event management, including 24 hour location security. Personal security, security drivers, minibus with driver hire. Credits:- "The Debt Collector", "Me, Myself & Irene", "The Cup". |
| Rockstar North | Production | Games | Maria Tabia (Press) | one of the world's leading games developer including the highly successful series of Grand Theft Auto games. |
| Royal Lyceum Theatre Company | Facilities | Facilities (Costume) | Maggie Kennedy | Large range of period costumes, available to hire. Film/TV hire, promotional events, individuals. |

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| | | | | Mon-Thur: 10-2pm Fri: 14.00-18.00. By appointment only. |
| Serendipity Productions | Production | Production Company | Colin Brown | Serendipity produces work which acts as a catalyst for discussion, reminiscence and interaction between senior and junior citizens in an educational, entertaining and sociable environment. The response to this process continues to be overwhelmingly positive. |
| Skyline Productions Ltd | Production | Production Company | Leslie Hills, Trevor Davies | Television programmes across a wide range of drama, music and arts documentaries, factual, outside broadcast and cinema features. |
| Sound + Vision AV Ltd | Facilities | Facilities (hire, event, IT) | Christopher D Montgomery | Scotland's premier supplier of competitively priced audio visual hire services, event production and staging, and AV equipment sales |
| Sprocketeers Ltd | Production | Production Company | Claire Kerr | Producers of drama & documentaries for TV and cinema. "Hushtown" for CBBC Tartan Smalls, 10 min TX Dec 2004. "Funny Kinda Guy" a feature-length documentary about a female-to-male transsexual's transition. "Inside An Uncle". Children's drama for Tartan Smalls. BBC Scotland 10 min dur. Tx Dec 2002. "Family" NewFoundLand for STV. 24 min dur. TX Oct 2002. |
| Starlight Security | Professional support service | Support Services | | Security provision tailored to your specific requirements: providing static, mobile and personnel guarding. Static and mobile guards undertake hourly patrols reporting to a central controller. Security personnel wear company uniform and are subject to rigorous vetting. |
| Stevenson College | Education | Training | Julie Watt, Derek Brogan | Digital media, audio visual technology, digital animation, drama, film and television, television operations, |
| Stiven Christie Management | Facilities | Casting Agents | | Stiven Christie Management is a theatrical agency which exists to promote a select portfolio of professional actors and actresses in their search for work and assist in the advancement of their professional careers. |
| Strange Boat | Production | Production Company | Juliet Rees, David Barras | All aspects of moving image work from shorts to corporates to DVD |

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| | | | | production |
| Sugar Tree Productions Ltd | Production | Production Company | Nicki Young | Television, film, new media and event production |
| Sunlight Studios | Advertising | Advertising | | |
| Talented | Advertising | Advertising | | |
| Ta-Ta Hats | Facilities | Facilities (Costume) | Ruth Bailey | Character costumes and quality headgear from historically accurate period pieces to fantasy hats, demon heads, animal heads. Original designs or made to spec. for theatre/film/advertising/promotions. |
| Tbwa | Advertising | Advertising | | |
| Tell-a-Vision Television | Production | Production Company | Hugh Lockhart | Video and audio consultancy & production. Television for broadcast and industry. In development: The Hanging of Black Jack Armstrong |
| Ten Alps Mtd | Advertising | Advertising | | |
| The Better Media Group Ltd. | Advertising | Advertising | | |
| The Hold | Production | Production Company | Kris Bird | We are available to undertake Music Video and Live Performance recording within Scotland. We specialise in promoting new artists and bands, working with record companies and management, but we can also create promotional DVDs on a budget for unsigned artists. We offer high quality services including colour finishing and complete packages at very competitive rates. Please see our website for details. |
| The Justin Case Company | Facilities | Transportation | | Flight Cases |
| The Leith Agency | Advertising | Advertising | Phil Adams (MD) | |
| The Lighthouse | Production | Studio | Mani Shoniwa | Studio - 30m x 10m and 10 m high. Concrete floor, drive in access (3.6 x 6m high). Production offices available. Rehearsal rooms. Free secure parking and nearby quality accommodation. |
| The Warehouse | Facilities | Facilities (Sound) | | Sound equipment hire with or without personnel. DAT recorders, Radiomics, Timecode accessories, Stereo mics, Digital multitracks, Mixers, Nagras, Music playback systems. Motorola walkie talkies. |

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| | | | | We hire, sell and maintain the largest range of sound equipment available in Scotland. Audio and Video tape sales. |
| Thomson Lowe | Advertising | Advertising | | |
| Those Media Guys | Production | Production Company | Oli Mival | *Advertise, Promote, Inform*. Those Media Guys are specialists of the moving image. Creating and providing content for television broadcast, for the internet and for display and distribution on DVD. Accommodate comprehensive production, post-production and 2D/3D animation services. Clients have included Warner Brothers, Edinburgh Festival Fringe and Royal Bank of Scotland. Idents, Adverts, EPKs, Corporate Video, Trailers. |
| Tods Muray Ltd | Professional support service | Support Services | Richard Findlay | A dedicated film and television law team provide a fully comprehensive media, entertainment and general corporate legal service to the screen industries in Scotland and beyond. |
| Tower Event Solutions | Production | Rigging | | Lighting, rigging, staging, power, heating for any event. |
| TRAVELEADS | Professional support service | Travel Agency | | Control your travel costs with expert assistance from Traveleads. Our bulk purchase discounts and specialist media deals will save you more money than dealing direct with airlines & hotels. Flights - Rail - Car/Van hire - Hotels - Meeting space - Storage Scheduled flights and aircraft charter - UK & worldwide Cast, crew and equipment - inbound or outbound travel. |
| Turnstone Advertising | Advertising | Advertising | | |
| Tynecastle Printing Company Limited | Professional support service | Graphics | | A fusion between innovative printing techniques and design. Specialising in promotional, marketing, web and publication design combined with a broad range of printing facilities. |
| Union Advertising Agency Ltd | Advertising | Advertising | | |
| University of Edinburgh | Education | Training | | Design and digital media |
| Viacom Outdoor | Advertising | Advertising | | |

| | | | | |
|---|---|---|---|---|
| Victoria Beattie Casting | Facilities | Casting Agents | | Casting UK and abroad |
| Pilton Video | Education | Training | | Resources for Community, Education and Broadcast in Documentary and Drama. PD 150 kits; FX1E High Def; Panasonic/Sony DV Access Cameras for Training. 4 Edit Suites - 2 Xpress Studio HD, 1 Avid Xpress, 1 Xpress NT with SDI. 3 X DVCAM Decks; I HVR - M10E HD Deck. |
| Visible Ink Television Ltd | Production | Animation | Martin Fisher | |
| Visual Services Scotland Ltd. | Facilities | Facilities (Sound) | Thomas .W. Allison | PA systems, radio mics, large screen projectors, all audio-visual hire. Full range of data projection - VGA, SVGA, XGA. |
| Vue Cinema Edinburgh Omni | Exhibition | Cinema | | Cinema |
| Vue Cinema Ocean Terminal | Exhibition | Cinema | | |
| Whitehouse Studios | Production | Studios | Tony Gorzhowski, Rod Stein | 2000 sq. ft drive-in studio with infinity cove. 30 ft high. Set up as stills photography studio but available for commercial hire by filmmakers. Large cove and kitchen area. |
| Wwav Rapp Collins | Advertising | Advertising | | |
| Xanthe Film & TV Ltd | Production | Production Company | Sunni O'Connor | MSc film graduate with experience in professional and low-budget film and TV. Producer/Director Credits include: "Doc's-Metacorpus", "Fly Poster Wars", film "A Wee Secret", "A Slice of Life". Production Asst Credits include: "Thig Tri Nithea" (Gaelic Tartan Short), "Scariest Places on Earth" USA TV. |
| Young People Speak Out | Education | Training | | Young People Speak Out offers an outreach workshop service to youth groups and schools. YPSO works with young people aged 12-25 and also runs a BME project for young people aged 12-30 years. |

## Appendix 2

## Activities of Edinburgh Production Companies

| | TV | Film | Animation | Interactive Screen | Corporate Video | TV and radio commercials |
|---|---|---|---|---|---|---|
| Freedonia Films | | x | | | | |
| Cadies Productions Ltd | x | x | | | | |
| Devlin Morris Productions Ltd | x | x | | | | |
| Analysis Lost Productions | x | x | | | | |
| Those Media Guys | | | x | | x | x |
| 20/20 PRODUCTIONS EUROPE LTD | | | | | x | |
| BLACK BEAR PRODUCTIONS LTD | x | | | | | x |
| Makar Productions | x | x | | | x | |
| SUGAR TREE PRODUCTIONS LTD | x | x | x | | | |
| HAND PICT PRODUCTIONS LTD | x | x | | | | |
| Mothcatcher Productions Ltd | | x | | | x | x |
| The Hold | | x | | | | x |
| Mediasport | | x | | | x | x |
| ASYLUM PICTURES LTD | x | x | | | | |
| Moondust Media | | | | | x | |
| Cormorant Productions & Films Ltd | x | x | | | | |
| CAGOULE PRODUCTIONS | x | | x | x | x | x |
| Tell-a-Vision Television | x | | | | x | x |
| SKYLINE PRODUCTIONS LTD | x | x | | | | |
| LA MEDIA LTD | | | x | x | x | |
| Heehaw Productions | | x | | | x | x |
| OSCUS MEDIA LTD | | | | | x | |
| Avonbridge Film Production Company Ltd. | x | x | | | | x |
| GATE FILMS (The) | | | | | | x |
| PLUM FILMS | | | | | | x |
| RED KITE ANIMATION | x | x | x | | | x |
| SERENDIPITY PRODUCTIONS | | | | | x | |
| MUCKLE HEN PRODUCTIONS LTD | x | | | | | x |
| Greenroom Films | x | x | | | | x |
| Sprocketeers Ltd | x | x | | | | |
| REPUBLIC PRODUCTIONS LTD | | | | x | x | |
| Xanthe Film & TV Ltd | x | x | | | | |
| Openhand Film & Video Production | | x | | | | |
| Red Point Productions | | x | | | | x |
| 1 Step 2 Production | | | | | | x |
| Liberty Films Ltd | | x | | | | |
| A Slight Shift | | | | | x | |
| Aztec Production | x | | | | x | x |
| Coconut Dog | x | x | | | | |
| Digital Face Productions | x | | | | x | x |
| iFrame Media Ltd | | | | | x | x |
| Natalie Scheff | | x | | | | |
| Nobles Gates | x | x | | | | |
| Red Zebra Productions | x | x | | | x | x |
| Strange Boat | x | x | | | x | x |
| Total | 24 | 27 | 5 | 3 | 19 | 21 |

## Appendix 3

## Examples of companies positioning as new platform providers

**BitTorrent (Inc.)**

BitTorrent has become a widely used way for many people to get hold of very large video files as the technology is very efficient at splitting up and sharing data.

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*UK Base*

None (HQ based in San Francisco)

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*Mission Statement*

"BitTorrent, Inc. provides revolutionary digital content distribution solutions. We are the creators of the most widely used BitTorrent download manager and vocal champions of the Open Source Community. We maintain the BitTorrent protocol and develop publishing tools that are utilized by millions of users worldwide."

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**Bloomberg.com**

Bloomberg is the leading global provider of data, news and analytics. The *Bloomberg Terminal* and Bloomberg's media services provide real-time and archived financial and market data, pricing, trading, news and communications tools in a single, integrated package to corporations, news organizations, financial and legal professionals and individuals around the world.

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*Key figures*

8000 Employees (Group)

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*UK Base*

London

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**Elata**

Elata is a global leader in mobile content delivery and device management software systems and is dedicated to developing innovative solutions for the wireless market. Since 2000, Elata has focused on the mobile data challenges facing mobile operators and service providers and has created a comprehensive range of modular, flexible solutions to meet their needs.

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*Key figures*

To date, Elata has secured funding of €13 million ($12.5 million) from Royal Bank Ventures, Frontiers Capital, NewMedia SPARK plc and the Hugh Symons Group plc

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*UK Base*

Elata’s head office is based in Poole, Dorset in the UK, with the Asia Pacific office located in Singapore. They currently employ around 45 people.

**FT.com**

The world's leading business website, FT.com allows every member of a modern day organisation to track their own agenda throughout the day - with real-time updates, powerful tools for company research and rapid-search archives. In addition, FT.com keeps them up to speed with a cutting-edge alerting service.

*UK Base*

London

**Flytxt**

Flytxt, the leading wireless marketing expert, was set up at the beginning of 2000 and has since built up an unrivalled list of blue chip clients and an extensive range of wireless marketing applications. Flytxt's technology platform and creative skills have been used to great effect in a number of wireless marketing campaigns, including a cutting-edge and award winning CRM campaign for Smash Hits, the biggest-ever SMS sales promotion campaign to date on behalf of Cadbury's and an innovative viral marketing campaign to create a pre-launch buzz around the release of Momentum Picture's film "Get Over It".

*UK Base*

London

*Mission Statement*

As a founding member of the Mobile Marketing Association (MMA), Flytxt is dedicated to ‘permission-based communication’ and is sensitive to consumers’ privacy. Flytxt is a fast-paced, independently owned company. Our principal investors are Herald Ventures, IVC and Mars Capital.

**Kazaa**

As the most popular peer-to-peer application and the world’s most downloaded software program, Kazaa represents a wealth of opportunities for business partners.

*Key figures*

Kazaa.com, Kazaa Media Desktop and Kazaa Plus are products of Sharman Networks. Sharman Networks is a proactive, virtual, global technology and publishing company, focused on delivering peer-to-peer software. Specific figures relating to Sharman and Kazaa are not available at present.

*UK Base*

None (HQ Australia)

*Mission Statement*

"We are working hard to meet our mission of delivering the best P2P experience in the world."

with established organization, both commercial and non-profit.

**Microsoft Corporation**

Microsoft, which was founded in 1975, is in its own words "the worldwide leader in software for personal computers." Microsoft has dominated the markets in which it does business so well, in fact, that over the past several years it has been embroiled in an antitrust legal battle, with the U.S. government and rival software makers contending that the company is a monopoly that bullies competitors into doing business on its terms, or else unfairly crushes those competitors in the marketplace. After some minor concessions on Microsoft's part, the federal case against Microsoft now seems to have been resolved.

*Key figures*

Market Cap: 285,408M USD
2002 revenue: $28,365 million
1-yr. growth rate: 12 percent
Number of employees: 50,500

*UK Base*

Microsoft University, Reading

*Mission Statement*

"At Microsoft, we work to help people and businesses throughout the world realise their full potential. This is our mission. Everything we do reflects this mission and the values that make it possible."

**Nokia Corporation**

The world's number-one maker of cell phones. The Group's principal activity is to provide mobile phones, broadband, IP network infrastructure and related services. It also develops mobile Internet applications and solutions for operators and Internet Service Providers. The group operates through the following segments: Mobile Phones, Network, Multimedia and Enterprise Solutions.

*Key figures*

2003 revenue: $37,031 million
1-yr. growth rate: 18 percent
Number of Employees: 53511

*UK Base*

Three offices based at Huntingdon, Farnborough, and Godmanchester

**NTL**

NTL is the UK's largest cable operator and a leading provider of broadband and communications services. The Group's principal activity is to provide Internet, telephone broadband communications services in the United Kingdom and the Republic of Ireland. The Group also provides Internet and telephone services to residential customers who are not connected to its cable network via access to other companies' telecommunications networks and via an Internet service provider operated by its subsidiary, Virgin Net Limited. The Group's services are delivered through its wholly owned local access communications network passing approximately 7.9 million homes in the United Kingdom and 464,000 homes in the Republic of Ireland.

*Key figures*

Market Cap: 5,522 M GBP
Number of employees: 12,480

*UK Base*

Hampshire & Huddersfield

**Virgin Mobile (now owned by NTL)**

Virgin Mobile is the UK's leading mobile virtual network operator (MVNO) with more than five million customers. Dynamic and popular, it was the first consumer brand to enter the mobile marketplace when it opened for business in November 1999.

*Key figures*

Market Cap: 950 M GBP

*UK Base*

Virgin Mobile employs more than 1,400 staff on four sites:
Trowbridge
London
Daventry
Middlesbrough

*Mission Statement*

“Our aim is to maintain our strong growth and broad recognition as a major customer-focused mobile communications provider by leveraging our brand and differentiated approach to market.”

**Opera Telecom**

Opera Telecom is a global provider of mobile media, billing, telephony and technology services, headquartered in the UK with offices around the World.

*Key figures*

Turnover for the period 2004 to 2005 was **£99m** with a pre-tax profit of **£6m**

*UK Base*

Birmingham & London

*Mission Statement*

“We believe that our people are key to our continued success and growth. As our industry changes from a technological perspective daily, we want people with the freedom to express themselves, follow their instincts and achieve their goals, while supporting them all the way.”

**Orange**

Orange is a multinational and multicultural venture, specialising in mobile telecommunications. It caters for 57 million customers in 17 countries across Asia, the Caribbean, Africa and Europe. Since its launch in 1994, Orange has been synonymous with making mobile communications an intuitive part of everyday life.

*Key Figures*

Market Capitalisation: 31,230 M GBP
Revenue of $17,907 million (2002)
34 percent 1 year growth rate
30,876 employees

*UK Base*

Orange UK is led by Bernard Ghillebaert
Serve over 14.5 million customers

*Mission Statement*

"Globally, we're one Orange, one brand that stands for the same things in every country we operate in. Locally, we're ready to adapt to very different sets of customer needs."

**$0_2$**

They are a leading provider of mobile communications services with 100% ownership of mobile network operators in three countries - the UK, Germany and Ireland - as well as a leading mobile Internet portal. All their businesses are branded O2.

*Key figures*

Market Cap: 17,502 M GBP

*UK Base*

Has the largest active customer base in the UK and a turnover of £4 billion
Opening a fourth call centre and employing 2,000 new customer-facing staff
Introduced new O2 loyalty programmes
Customers: Over 15m

*Mission Statement*

“Our goal is to make the O2 brand synonymous with innovation and quality. We want to be an integral part of our customers' lives, providing exceptional and memorable experiences of the mobile phone. By recognising, valuing and responding to their needs - in lifestyle, the home, business and the community - our business remains profitable, responsible, original and vibrant.”

**Sony Ericsson**

Sony Ericsson is a mobile telephone communications company. It is a 50:50 joint venture of Sony Corporation and Ericsson AB, was established in October 2001.

*Key figures*

Market Cap: 52,549M USD
The world's fourth largest mobile phone company
Shipped 16.1 million phones in the last three months of 2005
a rise of 28% on the same period in 2004
Pre-tax profits rose by 47% to 206m euros ($250m; £141m)
Sony Ericsson president Miles Flint said he expected the company's profit margin to hold at about 9% this year, with the handset market growing at 10%

*UK Base*

Creative design centre in London
Products retailed throughout the UK in stores and online

*Mission Statement*

“Our mission is to establish Sony Ericsson as the most attractive and innovative global brand in the mobile handset industry”.

**3 (Three)**

3 is the UK's leading mobile media company offering a convergence of communications, entertainment and information.

*Key figures & Base*

Three is 100% owned by Hutchison Whampoa (HWL) dates back to the 1800s and its operations span the globe. It is one of Hong Kong's largest companies and has a record of new business innovation and excellence. With operations in **53** countries and over **200,000** employees worldwide, Hutchison has five core businesses - ports and related services, telecommunications, property and hotels, retail and manufacturing, and energy and infrastructure.

Operating under the "3" brand, HWL is leading the ongoing revolution in the 3G arena. HWL was one of the first operators in the world to introduce 3G services, offering a vast range of mobile media content. HWL owns 3G licenses **in 11 markets: Australia, Austria, Denmark, Hong Kong, Indonesia, Ireland, Israel, Italy, Norway, Sweden and the United Kingdom, and now has a customer base of more than 10 million.**

Hutchison Whampoa Limited is among the largest companies listed on the main board of the Hong Kong Stock Exchange. Flagship companies include Hutchison Port Holdings, Hutchison Telecom, Hutchison Whampoa Properties, A.S. Watson and Cheung Kong Infrastructure. HWL reports consolidated turnover of approximately **HKD179 billion (USD23,000 million)** and **HKD109 billion (USD14,000 million)** for the year ended 31 December 2004 and for the six months ended 30 June 2005 respectively.

**Vodafone Group PLC**

The Group's principal activity is providing mobile telecommunications services. The Group's operations are carried out in two divisions: Mobile Telecommunications and Other Operations. Mobile Telecommunications: Provides a range of mobile telecommunications services including voice and data telecommunications. This division focuses on telecommunications, infotainment and IT productivity. This division offers multimedia messaging services such as pictures, music, sound, video and text to other compatible phones. Other Operations: Provides fixed line telecommunications with its own voice and data network offering its customers a range of services for voice and data transfer including complete ISDN/DSL connection services.

*Key figures*

Market Cap: 1,286,650 M USD
2003 revenue: $48,005 million
1-yr. growth rate: 47 percent
Number of employees: 66,667

*UK Base*

West Berkshire

*Mission Statement*

"Our Vision and Values guide the way we act. Our Vision is to be the world's mobile communication leader – enriching customers' lives, helping individuals, businesses and communities be more connected in a mobile world. Our Values are about how we feel – in other words the Passions that make us the company we are."

**Yahoo! Inc**

Yahoo is a number-one portal in terms of traffic with more than 200 million visitors a month. The Group's principal activity is to provide Internet products and services to consumers and businesses through a network of online properties. The properties and services for consumers and businesses currently reside in four areas: Search and Marketplace, Information and Content, Communications and Consumer Services and Affiliate Services. The products and service offerings are available without charge and revenues are generated from marketing and listing services and also offer fee-based premium services that provide the users access to additional content or services.

*Key figures*

Market Cap: 47,584 M USD
2003 revenue: $1,625.1 million
1-yr. growth rate: 70.5 percent
Number of employees: 7600

*UK Base*

Shaftsbury Avenue, London

## Appendix 4

## Relevant Further Education Courses

| Institution | Course | Qualification | Description |
|---|---|---|---|
| FURTHER EDUCATION | | | |
| Edinburgh Telford College | | | |
| Part Time | | | |
| | Basic Camera Techniques | HIFEE | This unit is lead by a practical creative assignment which is designed to develop a greater understanding of the camera techniques used in the Photographic Industry |
| | Introduction to Digital Media | NC | learning of practical media skills using a wide range of hardware and software to produce project-based creative assignments. Students work in video, audio and multi-media |
| | Introduction to Film and Television | Access 1 | basics of video production including camera handling and editing and also look at and discuss film and television |
| | Introduction to Mulitmedia | NC | range of units in creative design and computing |
| | Preparation for Design and Media | NC | study of a range of practical skills in graphic design, multimedia, illustration and video production; also a range of core skills and undertaking of personal evaluation and development |
| Full Time | | | |
| | HNC Creative Industries:Radio | HNC | practical aspects of Radio production, including interviewing, music programming, scripting, newsroom operations and radio commercials production. Digital production and Digital post production are a key feature of this course |
| | HNC Photography & Digital Imaging | HNC / HND | core units in creative photography, studio photography, lighting and lighting techniques, digital image processing, electronic imaging, photography on location, press and photojournalism, fashion freelance skills and photography for the web |
| | HND Creative Industries:Television | HND | main elements of video production, including location work, lighting, sound, linear and camera editing, scripting and production to client briefs; during 2nd year extending technical/production skills and acquire non-linear editing, video compositing and post-production sound skills. There is also a strong emphasis on writing, directing and production management |

| | | | |
|---|---|---|---|
| | HND Interactive Mulitmedia Creation | HND | Multimedia fundamentals, audio visual techniques, graphics for creative multimedia design, using key software packages such as Photoshop, Flash, Dreamweaver, InDesign and Illustrator; 2nd year further skills development in Multimedia and content creation, while specialising in one of the following themed collection of units, which includes Interactive Entertainment, Audio Visual, Programming, Animation and Graphic Design |
| | HND Photography and Digital Imaging | HND | core units in creative photography, studio photography, lighting and lighting techniques, digital image processing, electronic imaging, photography on location, press and photojournalism, fashion freelance skills and photography for the web |
| | HND Television Operations and Production | HND | main elements of video production, including location work, lighting, sound, linear and camera editing, scripting and production to client briefs. In the second year, extending technical/production skills and acquire non-linear editing, video compositing and post-production sound skills |
| | Introduction to Digital Media | NC | Students learn practical media skills using a wide range of hardware and software to produce project-based creative assignments. You will work in video, audio and multi-media |
| | | | |
| Jewel & Esk Valley College | | | |
| Part Time | | | |
| | NQ Higher Media Studies | n/a | n/a |
| Full Time | | | |
| | HNC Multimedia Computing: Web Development | | Multimedia Applications; Implementing Multimedia Solutions; Developing for the Web |
| | Access to HE: Digital Media | | Graphics; Video Production; Publishing on the Internet; Internet; Mulitmedia; Writing for Print and Broadcast Media; Multimedia Technology; Publishing on the Internet; Core Skills; Media Anaysis (Fiction and Non Fiction) |
| | HNC Creative Industries: Television | SCQF Level: 7 | Camera Operation; Lighting; Sound; Editing; Scriptwriting; Production Management; Directing; Broadcast Law; Industry Structure and Practices; Practical Work Experience (2nd Year) |

| | | | |
|---|---|---|---|
| | HNC Interactive Multimedia: Creation | SCQF Level: 7 | Multimedia Fundamentals; Audio Visual Techniques for Multimedia Applications; Writing for the Media; Developing Multimedia Applications; Graphics for Creative Multimedia Design; User Interface Development; Researching Multimedia Applications for Practical Re-Delivery; Project Management; HNC Graded Unit: Examination; User Interface: Testing and Developing; HND Graded Unit: Project; 2D Digital Imaging and Animation; 3D Modelling and Animation |
| | HNC Sound Production | SCQF Level: 7 | Multitrack Recording and Mixdown; Digital Audio; Sound Theory and Practice; Acoustics; Midi Sequencing using Cubase SX and Reason; Sound Reinforecement; Creative Remixing; DJ Skills |
| | HND Creative Industries: Television | SCQF Level: 8 | Camera Operation; Lighting; Sound; Editing; Scriptwriting; Production Management; Directing; Broadcast Law; Industry Structure and Practices; Practical Work Experience (2nd Year) |
| | HND Interactive Multimedia: Creation | SCQF Level: 8 | Multimedia Fundamentals; Audio Visual Techniques; 2D and 3D Graphics; Research; User Interface Development; Animation; Project Management; Writing for Multimedia Applications; Graphics; Animation; Interactive Entertainment; Audio Visual |
| | HND Sound Production | SCQF Level: 8 | Multitrack Recording and Mixdown; Digital Audio; Sound Theory and Practice; Acoustics; Midi Sequencing using Cubase SX and Reason; Sound Reinforcement; Creative Remixing, DJ Skills |
| | NQ Intermediate 1 Programme: Introduction to Music Technology | | Four Track Recording; Stereo Recording; Solo Keyboard; Music Promoting & Managing; Introduction to Electronic Music Systems; Studio Skills Project; Media Studies: An Introduction; Information Technology; Numeracy; Communication; Personal Effectivenes |
| | NQ Intermediate 2 Programme: Access to Interactive Multimedia | | English as a foreign Language; Communication; Numeracy; Information Technology; Problem Solving; Working with Others; The Internet; Multimedia Computing: Intro to Digital Photography; Multimedia Technology: Intro to Video Production; Multimedia Technology; Core Mathematics; Hypermedia; Computer Applications Software; Graphics Multimedia |

| | | | |
|---|---|---|---|
| | NQ Intermediate 2 Programme: Certificate in Music Production Technology | | MIDI Sequencing; Music Promoting and Managing Music Production and Sound Engineering (4 track); Electronic Music Systems; Communication; The Internet; Recording Techniques; Synthesis; Communication; Music Making: Solo Keyboard Skills; Music Technology Project; Music Invention; Numeracy; Problem Solving; Working with Others; Media Studies; Personal Effectiveness |
| | NQ Intermediate 2 Programme: Certificate in Sound Engineering | | Information Technology; Sound and Basic Recording Techniques; Music: Production and Sound Engineering; Personal Effectiveness; Media Studies: Introduction; Communication; Numeracy; Music: Promoting and Managing 1&2; Introduction to Electronic Music Systems; Electrical Connectors for Musical Instruments; Electronic Components and Circuit Assembly; Electronic Sound Generators; Considerations for Self Employment; JEVC Studio Skills Projects |
| | NQ Intermediate 2 Programme: Certificate in Television Operation Production & Multimedia | | Communication; Numeracy; Information Technology: Office Applications; Media Studies; Media Analysis; Media Production; Introduction to Digital Photography; Introduction to Video Production; Television: Basic Production Techniques; Multimedia Applications; Television: Basic Single Camera Operation on Location; Television: Sound Recording for Programme Origination; Television: Programme Origination Techniqes; Contemporary Issues |
| | | | |
| Stevenson College Edinburgh | | | |
| Part Time | | | |
| | Introduction to Broadcast Graphics | College certificate | Focusing on Adobe After Effects as an advanced video production tool the course will look at basic and advanced techniques in media creation, compositing and effects, digital formats and codecs |
| | Introduction to Digital Editing | College Certificate | Using 'Adobe Premiere Pro', this course will cover processes and techniques used in a variety of digital video editing programmes, including using editing tools, audio editing, video sequences and shot transitions |
| | Script Writing for Beginners | College Certificate | theory and structure involved in scriptwriting, including character arc and development, dialogue and plot, formatting and pitching |

| | | | |
|---|---|---|---|
| | Video Production | SQA National Unit at Higher level | An introductory course to processes and techniques required to plan, produce, shoot and edit a short video |
| | Media Studies (Higher) | Higher Media Studies | This course gives a critical understanding of the various media and their products |
| | Photography Advanced | SQA National Units at Higher Level | You can choose two units from the following: portraiture, close-up photography, still life, documentary and studio photography |
| | Photography Foundation | SQA National Units at Higher level | This course will introduce you to black & white photography. You will learn about the basics of camera techniques, film processing and printing |
| | Photography HNC | Higher National Certificate | The course will develop conceptual and aesthetic values associated with the production of the still image and technical skills required by today's photographic profession |
| | | | |
| WHALE Learning Centre | | | |
| Part Time | | | |
| | Access to Creative Arts | SQA National Units at Intermediate 1 and 2 level | broad range of subjects in Photography, Audio-Visual, Communication, IT, Media and Drama |
| Full Time | | | |
| | Access to Creative Arts | SQA National Units at Intermediate 1 and 2 level | broad range of subjects in Photography, Audio-Visual, Communication, IT, Media and Drama |
| | | | |
| West Lothian College | | | |
| Part Time | | | |
| | Music - Introduction to sound recording | non-certificate | This is a 12 week course with one evening class per week |
| | Video Production and Editing | non-certificate | This practical hands on programme is an extension to Video filming with students using I-Movie to edit film |
| Full Time | | | |
| | Communication with Media HNC | HNC | The programme consists of 15 SQA HN units and subjects include advertising, journalism, marketing, public relations, desk to publishing and research skills |
| | Interactive Multimedia/Web Creation | HNC | The programme consists of 15 Higher National units and subjects include: multimedia applications; multimedia fundamentals; audio and video production; CD and web design, with options including animation and graphics |

| | | | |
|---|---|---|---|
| | Media Production | NC | The programme comprises of TV basic production techniques, radio broadcasting, media studies, digital editing, multimedia, scripting and stage make-up. Information technology, communication and desk top publishing also form part of the studies |
| | Television Operations and Production | HNC | The programme consists of 15 Higher National units and subjects include: scripting, lighting, camera, editing and film production |

## Appendix 5

## Relevant Higher Education Courses

| | | | |
|---|---|---|---|
| HIGHER EDUCATION | | | |
| Edinburgh College of Art | | | |
| Undergraduate | | | |
| | Visual Communication (Animation) | BA(Hons) | The Department provides all the expertise and technical resources required to produce animated film and video, as well as encouragement and support for students' personal projects |
| | Visual Communication (Film and TV0 | BA(Hons) | The moving image, in film and television, is an integral part of the modern world. It is a source of information and entertainment, the product of a rich and complex range of aesthetic and technical activities. |
| | Visual Communication (Graphic Design) | | The eca programme focuses clearly on the development of ideas, and is designed around opportunities to develop creative solutions to realistic briefs |
| Postgraduate | | | |
| | Animation PGDip/ Mdes | PGDip/ Mdes | Postgraduate study in animation, whether for the PGDip or MDes degree, is essentially an opportunity to build on undergraduate work. Above all, it offers an opportunity to present works of pure imagination in a powerful and accessible form |
| | Film and TV PGDip/ Mdes | PGDip/ Mdes | The Film and TV Department at eca structures its work around a project-based, collaborative approach. Practical work is team-based, with each student drawing together a team of fellow-students and others to bring their personal project to fruition. |
| | Graphic Design PGDip/ Mdes | PGDip/ Mdes | The postgraduate Graphic Design programmes at eca are built firmly on fundamental design skills and on the ability to develop and use original ideas and approaches. The cornerstone of the teaching is the stream of conceptual and visual thinking what allows students to work in any medium from pencil and paper to an interactive digital interface. |
| | | | |
| University of Napier | | | |
| Undergraduate | | | |

| | | | |
|---|---|---|---|
| | Screen Project Development FT/PT | MA | This course offers aspiring film, television and interactive media producers the opportunity to develop their creative and business skills and take a live project through an intensive, supported development process. Professional tuition in creative skills from documentary research to script editing is allied to the business of producing pitching projects, raising finance and doing the deal. |
| | Screen Writing FT/PT | MA | The course combines taught modules in the creative and craft aspects of screenwriting with script development workshops |
| | Journalism | BA | This course offers a specialism in broadcast journalism (alongside print and radio) from years 3 and 4 onwards. |
| | Photography, Film and Imaging | BA | This course offers a specialism in practice based (70% practical) film and moving image production |
| Postgraduate | | | |
| | Advanced film Media Practices FT | MFA | The programme is geared towards filmmaking for the cinema and has been developed, in consultation with film industry practitioners, as an integral part of the Screen Academy Scotland |
| | | | |
| Queen Margaret University College | | | |
| Undergraduate | | | |
| | BA Film and Media | BA (Hons) | The course develops your critical understanding of the growth of the media industries globally and Hollywood's role in that growth, the centrality of film to popular culture, and the diversity of media texts available to audiences. |
| | BA Media and Culture | BA (Hons) | This programme combines the study of the media industries with that of aspects of lived and popular culture. |
| | BA Media and Culture | BA (Hons) | The course develops your critical understanding of the rapid growth of the media Industries globally, the diversity of media texts available to audiences, and the significance of this for citizenship in the modern world. |
| | BA Acting and Performing | BA (Hons) | The aim of this course is to develop the unique qualities of each individual and to offer the opportunity to become skilled, collaborative, versatile and employable actors and performers. |

## Appendix 6

## Calendar of Moving Image Festivals

| | January | February | | | | March | | | | April | Mai | | | June | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | | Int. Film-festi.val Rotterdam | | | | Brussels cartoon a. animated Film Fest. (ANIMA) | Mardi Grass | | Kinofilm – Manchester Int. short film festival | | Commonwealth Film Festival, Manchester | | | | |
| 2 | | | | | | | | AV Festival Newcastle | | | | | | | |
| 3 | | | Cosmic Zoom, Copenhagen | | | | | | | MIP TV, Int. Film and Programme Market for TV | | | | | |
| 4 | | | | | | | | | | | | Int. Short Film Festival Oberhausen, Ger | | | |
| 5 | | | | | | | Oscar | | | | | | | | |
| 6 | | | | Animex – int. Fest. of ani. & Games, Middlesbor | | | | | | | | | | | |
| 7 | | | | | | | | | | | | | | | |
| 8 | | | | | | | | | | | | | | | |
| 9 | | Berlinale Int. Filmfestival Berlin | | | | | | | | | | | | Sydney Int. Film Festival | |
| 10 | | | | | | | SXSW – Interactive Film Festival, Austin, Texas | | | | European Media Art Festival, Osnabrueck, Ger | | | | |
| 11 | | | | | | | | | | | | | | | |
| 12 | | | | | | | | | | | | | | | RTS Educati |
| 13 | | | | | | | | | | | | | | | |
| 14 | | | | | | | | RTS Programme Awards 2005, London | | | | | | | |
| 15 | | | | | | Videoformes, Clermont-Ferrand | | | | | | | | | |
| 16 | | | Mardi Grass Film Festival, Paddington Australia | Glasgow Film Festival | | | | | | | | | | | Shanghai Int. Film Festival |
| 17 | | | | | | | | | | | Festival de Cannes | | | | |
| 18 | | | | | | | | | | | | Cologne Conference & Screenings | | | |
| 19 | | | | | British Film Academy Film Award | | | | | Cortisane Festival for Short film, video and new media, Ghent Belgium | | | | | |
| 20 | | | | | | Independent Game Festival, San Jose, California | | Lovebytes – Int. Festival of Digital Art and Media, | | | | | | | |
| 21 | | | | | | | | | | | | | | | |
| 22 | | | | | | | | | | | | | | | |
| 23 | | | | | | | | | | | | | | | |
| 24 | | Brussels cartoon a. animated Film Fest. (ANIMA) | | | Kinofilm – Manchester Int. short film festival | | Greewich Film Festival – this year's focuses on Digital film | | | | | | DIBA – Digital Barcelona Film | | |
| 25 | International Film Festival Rotterdam | | | | | | | | | | | | | | |
| 26 | | | | | | | | | | | | | | Monte Carlo Television Festival | |
| 27 | | | | | | | | | | | | | | | |
| 28 | | | | | | | | | | Commonwealth Film Festival. | | | | | |
| 29 | | | | | | | | | | | | | | | |
| 30 | | | | | | | | | | | | | | | |
| 31 | | | | | | | | | | | | | | | |

film/short film/major film awards
cartoon & animation
video/new
TV
Advertising

Notes: 1) festival date in 2005

| | June | | July | | August | | | September | | October | | November | | December |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | | | Darklight | Monte Carlo | Melbourne International Film Festival (Film, shorts, animation) | | | | La Biennale di Venezia | | | The Times *bfi* London Film Fest. 1) | | |
| 2 | | | | | | Locarno Int. Film Festival | | | | | | | | |
| 3 | | | | | | | | | | | | | Leeds Int. Film Festival 1) | |
| 4 | | | | | | | | | | | | | | |
| 5 | | | | | | | | | | | | | | |
| 6 | | | | | | | | | | | | | | Havana Int. Latin American Film Festival 1) |
| 7 | | | | | | | | Toronto Int. Film Festival different film genres | | | | | | |
| 8 | | | | | | | | | | | | | | |
| 9 | | | | | | | | | | Mipcom, Int. Film & Pro. market for TV, video, cable | | | | |
| 10 | | | | | | | | | | | | | | |
| 11 | | | | | | | | | | | | | | |
| 12 | | | | | | | | | Liverpool film festival – no date fixed yet but will be in September 2006 | | | | | |
| 13 | | | | | | | | | | | | | | |
| 14 | | | | | Edinburgh Int. Film Festival | | | | | Prix Europa – Int. Radio and Television contest, Berlin | | | | |
| 15 | | | Skip City – Int. D-cinema festival, Saitama, Japan | | | | | | | | | | | |
| 16 | | | | | | | | | | | | Northern Lights Film Festival - Newcastle | | |
| 17 | | | | | | | | | | | | | | |
| 18 | Cannes Lions – Int. Advertising Festival | | | | | | | | | | | | | |
| 19 | | | | | | | | | | | The Times *bfi* London Film Festival – British Film Institute 1) | | | |
| 20 | | | | | | | | | | | | | | |
| 21 | | | | | | Edinburgh Interactive Entertainment Fest. | | Copenhagen Int. Film Festival | | | | | | |
| 22 | | Darklight Digital Festival, Dublin | | | | | | | | | | | | |
| 23 | | | | | | London Int. Animation Festival – LIAF 1) | | | | | | | | |
| 24 | | | | | | | | | | | | | | |
| 25 | | | | | | | Mediaguardian Edinburgh | | | | | | | |
| 26 | | | Melbourne International Film Festival (Film, shorts | | | | | | | | | | | |
| 27 | | | | | | | | | | | | | | |
| 28 | | | | | | | | | | | | | | |
| 29 | | | | | | | | | | | | | | |
| 30 | | | | | Venice | | | | | | | | | |
| 31 | | | | | | | | | | | | | | |

film/short film/major film awards
cartoon & animation
video/new
TV
Advertising

Notes: 1) festival date in 2005

## Appendix 7

## Summary of Moving Image Festivals

| | Berlinale | Festival de Cannes | Locarno | Rotterdam |
|---|---|---|---|---|
| **Location** | Berlinale Palast on Potsdamer Platz/Berlin as main festival venue | Cannes, France; main facility is a former casino | Locarno, Switzerland (Ticino) | City centre of Rotterdam, the Netherlands |
| **Venues** | - 13 venues<br>- 23 screens<br>- 11151 seats | - 1 venue - Palais des Festivals | - Piazza Grande as showcase and 22 other venues across the city | - 9 venues<br>- 20 screens |
| **Format of the event** | - 11 day festival<br>- open to the public<br>- 345 films in public programme<br>- 1,110 public screenings | - 12 day festival<br>- not for public<br>137 films in competition and 844 films in film market | 11 days<br>- open to public<br>- 496 films | 12 days<br>- open to public |
| **Sponsors and financing** | - Public funding: 7.5 million Euro (40% of total budget) by the minister of state at the federal chancellery with (which includes the European Film Market)<br>- Main sponsors: ZDF, L'ORÉAL PARiS, and Volkswagen<br>- other private partners: Arts Alliance Media, London , Canon, HUGO BOSS, Sony and T-Online and about 30 more<br>- generated income: ticketing, entry passes and rent for stands at European Film Market and advertising | - 50% public funding via the National Cinema Centre under the authority of the Ministry of Culture and Communication, the city council and other regional autorities<br>- Total festival buget is about 20 million Euros.<br>- main sponsors: Chaupard, NEC, Renault<br>- Other sponsors: 24 | Public funders: Swiss Federal Office of Culture:<br>- Sfr 1.2 million = 12% of festival budget<br>- Conton Ticino (Sfr 2 million)<br>- City of Locarno<br>- private principal partners: UBS, AET, Manor, swisscom<br>- 14 other private partners | - Funders: Mondriaan Foundation, Princ Bernhard Culture Fund, Dutch cultural broadcasting Fund, Thuiskopie Fonds, City of Rotterdam, VSB Fonds, HGIS Cultural programme, the province of Zuid Holland, Amnesty international and Rotterdam festivals<br>Major sponsors; Tiscali, VPRO, Robeco, DeVolkskrant<br>- 27 other sponsors and partners |
| **Audience development** | in 2005, 396,000 cinema visits have been counted | - since 1995 over 3,000 journalists<br>- accredited professionals grew from - to:<br>- 2003: 18,926<br>- 2004: 20,071<br>- 2005: 21,449 | Figures for Piazza Grande (open air public screening)<br>- 2001: 73,300<br>- 2002: 73,800<br>- 2003: 75,200<br>- 2004: 65,450 | - 2005: 358,000<br>- 2006: 358,000 |
| **Industry event/trade show** | 1) European Film market with over 250 participating companies and 650 films in 2006<br>Statistics from 2005:<br>- 4,284 prof. participants from<br>- 38 countries<br>- 860 screenings<br>- 165 companies from<br>- 70 countries<br>2) Berlinale Co-Production Market (numbers from 2005)<br>- 350 participants from<br>- 558 films | 1) Marche du Film with 3,404 registered companies in 2005.<br>Statistics from 2005:<br>- 9,476 film professionals from<br>- 83 countries<br>- 3,681 films presented<br>- 844 films presented in<br>- 1,520 screenings<br>2) Producers Network Breakfast Meeting i. 2005 with<br>- 547 producers<br>3) Short Film Corner with<br>- 617 registered short films<br>- 616 paricipants and<br>- 680 professional | 1) Open doors: highlighting film projects from nations that are still 'developing' – in film terms, at least – and of assisting them in the search for co-production partners | 1) CineMart: approx. 45 selected projects are presented in an effective but informal atmosphere<br>- on invitation only market |
| **Education and skills** | Talent Campus<br>- 530 participants from<br>- 90 countries | The Festival Residence<br>- 4.5 months residence<br>- 12 fictional feature film projects | Leopards of Tomorrow (newcomers):<br>- one Swiss section<br>- one section dedicated to one geographical region every year | - Rotterdam Lab: training workshop for young and emerging producers |
| **Number of delegates / audience figures** | - 2006: over 19,000 accredited professional from 120 countries including 3,800 journalists<br>- 2005: 16,747 accredited professionals from 119 countries incl. 3,815 journalists | - 2005: 21,449 accredited professionals from 107 countries<br>- 3,540 journalists from 79 countries | - In 2004: 3,765 accredited professionals<br>- 1,126 journalists | - In 2005: almost 3,000 accredited professionals including 540 journalists |
| **Established** | 1951 | 1946 | 1946 | |
| **Awards** | - Golden Bear (long and short film)<br>- Silver Bear for 7 different categories<br>- and over 35 other prizes | - The Palm D'or<br>- 7 other feature film prizes<br>- 2 short film prizes | - Golden, Silver and Bronze Leopard<br>- Special Jury Prize<br>- Prix du Public USB | - VPRO Tiger Awards competition<br>- 11 other prizes |

| | *bif* London Film Festival | Commonwealth | Lovebites | Northern Lights |
|---|---|---|---|---|
| Location | London | Manchester | Sheffield | Tyneside (Newcaslte, Middelsborough, Gateshead) |
| Venues | the "Film in the City" initative brings films to local cinemas<br><br>- 6 venues, 1 screen on Trafalgar Square | - 3 venues | - 4 venues<br>- 2 screens | - 7 venues<br>- plus University for symposium |
| Format of the event | 16 days<br>- open to public<br>- 300 films<br>- 350 screenings (in 2003) | 10 days<br>- open to public<br>- over 200 films<br>- 75 public screenings (in 2005) | 3 days<br>- 18 film screenings<br>- 7 talks<br>- 11 performances<br><br>- open to public | 8 days<br>- open to public |
| Sponsors and financing | - Public funding: Film London, Mayor of London, LDA and Creative London (together<br>- sponsors: TCM, SKYmovies, TV5<br>- 5 media and broadcasting partners<br><br>- 14 in kind sponsors<br><br>- 16 funders | - Funders: M'cr City Council, NWDA, Northwestvision, UK Film Council, National Lottlery fund, and others<br><br>- headline sponsors: CLFNW. msp - Manchester Science Park, Addleshaw Goddard | - Funders: Arts council, EU, Illuminate Sheffield, Objective 1 South Yorkshire, Paul Hamlyn Foundation, PRS Foundation for new music, screen yorkshire<br><br>- 11 other partners | - Funders: northern film & media, UK film council, one northeast, northernrockfoundation, NewcastleGateshead, Arts council, cities of Newcastle, Middelsborough, Gateshead, EU ("Media"), University Tyneside, Provoking visual art<br><br>- private sposors: DFDS Seaways, Gner, thelivingroom, nicehotels |
| Audience development | - 2002: 110,000<br>- 2003: 115,000<br>- 2005: 114,025 | no figures found | no figures found | no figures found |
| Industry event/trade show | no | - 1 day co-production forum conference<br><br>- about 70 participating companies | - Digital Space: Showcase for creative digital work<br><br>Partners are: Lovebyte and Sheffield Media and Exibition Centre, part-funded by ERDF | - Northern lights film festival industry summit |
| Education and skills | - 40 education events for teachers, students and families<br><br>- seminars and master classes<br><br>- workshops | - 11 master classes, seminars, panels | no information found | - film academy for young people<br><br>- symposium at Uni of Tyneside |
| Number of delegates / audience figures | Figures from 2003:<br>- 700 industry delegates<br>- 2003: 670 journalists<br>- from over 40 countries | no figures found | no figures found | no figures found |
| Established | 1957 | 2001 | 1994 | 2003 |
| Awards | - 6 different awards | none | none | - 2005: Northern Star Film Production award |

## Appendix 8

## Overview of Studio Provision in the North West of England

| Company name | Overview |
|---|---|
| Liverpool Film Studios | The Liverpool Film Studios, which is conveniently located close to the city centre of Liverpool, can offer a range of studio space (from 2200-8200 sq ft). Each studio includes green rooms, make up rooms, toilets and offices. In addition there is ample parking space for all size of vehicles and 24 hour security. All available on a daily/weekly rate. For further information visit website www.liverpoolfilmstudios.co.uk and/or call for full information pack. |
| PHA Icon Ltd | Adult Actors Child Actors Extra's & walk-ons Models Casting Studio (for hire) Photographic Studio |
| South Manchester Studios Limited | South Manchester Studios is a long established television and film studio facility in Stockport. The studios house productions throughout the year ranging from a staple diet of commercials for major advertising agencies and production companies, to feature films, television drama, comedy and light entertainment, religious programming and music videos. The studios offer production companies soundproof studios with drive in access, laser leveled floors and infinity coves. To support productions, the studios also have dressing rooms, green rooms and on-site catering. The studio is also a media village to a number of small companies trading independently and in support of the studios. |
| 3sixtymedia | 3sixtymedia is a joint venture between Granada and the BBC Resources providing a wide range of production facilities, including Film Stages, Studios, Post Production and Graphics. 3 widescreen studios are complimented by over 25 online and offline Edit Suites, alongside Editbox; Telecine; DaVinci; 16mm and 35mm Film Dubbing Theatres; Audio Post and tape Transfer. The 3sixtymedia Creative Team offer on-screen Graphics and Visual Effects skills, using technology such a Flame, Paintbox, 3D and Motion Capture. There are a wide range of client support facilities including Make-Up and Costume, Green Rooms, Dressing Rooms, Production Offices and Hospitality. 3sixtymedia together with The Leeds Studios, ProVision, Film Lab North and Finish School (see separate entries), deliver the most extensive choice of facilities in the North. |

| | |
|---|---|
| Glass Eye Productions Ltd | Studio, Post Production, Production. BECTU Registered. Film and Video production, DVD Authorizing, Editing/ Postproduction, Motion Graphics, Consultation. |
| Irving Rice and Partners | Assistance in finding location business sites. |
| Lee Lighting | The company also has on our site at Kearsley a fully soundproofed studio available for hire with make up room, working kitchen, green room, production offices which is ideal for any commercial or pop promo shoots. They can also supply you with crew, lights and cameras if required. |
| Toxteth TV | Toxteth TV is a modern TV studio and broadcast facility situated in the heart of Liverpool. As well as being fully kitted out with broadcast quality apparatus, our soundproof studio offers: 1690 sq ft floor space; full broadcast standard lighting grid; 3xSony CA-D50 floor cameras patched to video control; black/white/green cyclorama; drive-in access and in-house technical studio manager. The video Control Gallery includes: Beta S, DV/DV Cam and VHS format; Snell&Wilcox Key option Digital 16:9 vision mixing desk; autocue and lighting desk; integrated graphics workstation; 24-track pro audio mixing desk and talk back facilities to studio floor. TTV also offers: a light and relaxing reception area; green room facilities; an on-site coffee/snack bar; a production office; make-up and wardrobe room; set/tape/equipment store; proximity to major roads, mainline rail and airports; and secure gates parking with CCTV. |
| Keylink Studios | Keylink Studios is a registered charity providing a range of in house media facilities. We have three digital Sony Es-3 edit suites, TV studio with calroma key capabilities, 24 track digital sound live room and radio production studios for audio production. |
| Nomad Studios | Offer 3 dry hire, mute studios for set construction and prop making. Mainly used for stills work and some commercials. In house model-makers, set design and construction available. |
| Weston Point Studios | Weston Point Studios is situated between Manchester and Liverpool, and has all production needs under one roof. TV & corporate production, broadcast crews with digibeta |
| ADI UK Ltd | ADI UK Ltd offer a broad range of production and communication services including:- Advanced OB Units; Studio Services; Post Production; Duplication & Replication; Encoding; content delivery; filming; lights; crew; graphics creation. |