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**Culture, Tourism, Europe and External Relations
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**Comataidh Turasachd, Eòrpach agus Dàimhean Taobh a-
muigh**

The Bigger Picture: A screen agency for Scotland



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Culture, Tourism, Europe and External Relations Committee

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- (a) proposals for European Union legislation;
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Key recommendation

We want a vibrant screen sector in Scotland. That requires a stand alone agency which is not encumbered by bureaucracy and is industry led. An autonomous “Screen Scotland” will help nurture, develop and support indigenous talent, deliver more studio capacity, attract major productions, and represent Scotland to the rest of the world. It’s time to accelerate our ambition for screen as a nation. It’s time for action.

The changing production and consumption of screen media

1. Only a few years ago, online streaming was in its early days. Now it is a key way of consuming entertainment. The budgets of online screening platforms have created a surge in demand. Netflix alone plans to spend \$7-8 billion on commissioning content in 2018. Walt Disney has purchased 21st Century Fox so that it has combined studio and broadcasting facilities to compete. Nations and regions all over the world have recognised the potential of the industry and have invested in studios, developed incentives and established screen agencies with a view to capitalising on this growth.
2. In Scotland, the filming of the Outlander series in Wardpark studios in Cumbernauld demonstrates the value of this industry in terms of investment and jobs. It has brought over \$400 million of investment, providing wide-ranging employment and training opportunities. But Outlander is an exception; we have failed to invest in studio space and capitalise on these new opportunities. Other regions and nations have overtaken us. Scotland secured only a small portion of the £2 billion spent on productions in the UK in 2015. That must change. We must secure and sustain several large productions in Scotland at any one time.
3. While the growth in global streaming is the key driver of our recommendation, other recent developments in Scotland mean the time is right to for an empowered and autonomous screen agency. The new BBC Scotland channel will launch soon, whilst Glasgow's bid for the new Channel 4 HQ also provides exciting opportunities for the indigenous industry. The decision by Ofcom to revise criteria for out of London production also offers the potential for increased television network spend from Scotland.

Background to the inquiry

4. In January this year we embarked on an inquiry to ensure that the new Screen Unit, which is to be established within Creative Scotland, will deliver the recommendations of the [Screen Sector Leadership Group \(SSLG\)](#) Report. The SSLG was established to consider how an enhanced Screen Unit could assume the critical role of addressing public sector fragmentation and providing an overarching screen strategy with strong leadership and accountability.
5. Over the course of the inquiry it has become clear to us that the proposal for the Screen Unit will not deliver the step-change in support that the screen sector in Scotland needs to be sustainable and successful in a fast-changing global market. While it is clear there are dedicated and talented individuals working on screen within Creative Scotland, we believe that ultimately the Screen Unit needs to be transformed into "Screen Scotland": an independent screen agency with a wide-ranging remit to represent and promote the screen sector in Scotland. Both the staff and the Board members of "Screen Scotland" should be individuals with a strong knowledge and understanding of the sector, and with the vision to ensure that Scotland can compete successfully in a global market.

The Screen Unit Proposal

6. The evidence heard from a wide range of voices within the sector has brought us to the early conclusion that the Screen Unit Proposal is a public sector - and not a screen sector - solution. It will bring the key public sector agencies around a table with no guarantee this will lead either to agreement among these players, or the transformation required. The Screen Unit Proposal foresees an inadequate role for the sector itself and insufficient discretion and autonomy within the governance arrangements to allow dynamic decision making. We are unconvinced it embodies the vision or demonstrates the strategy needed to guarantee success.
7. In particular, we believe the cumbersome governance arrangements, designed to address the problem of public sector fragmentation, are overly bureaucratic. This will constrain, not promote, change in the sector. We are not convinced that the Screen Unit will be sufficiently fleet of foot in decision making. The head of the unit will work to a screen committee made up predominantly of public sector partner agencies, and the creative Scotland Board with only one person with any industry experience.
8. We have also heard continuing concern about the need for specialist expertise to support the many SMEs in the screen sector. A stand alone screen agency could provide bespoke business support and be far more successful in encouraging the overall growth of the sector in Scotland. We believe that as the screen sector differs from other creative sectors in its commercial potential, it does not fit with well within Creative Scotland.

A role for the sector

9. Throughout this inquiry we have been impressed by the leadership and vision that the screen sector in Scotland has shown in the last few years. The Screen Sector Leadership Group, as well as the many industry bodies active in Scotland, have articulated loudly and clearly their ambition for screen in this country. We are struck by the enthusiasm, the expertise, the drive and the commitment of the sector to securing a strong future for screen in Scotland. This is reinforced by the many Scots who occupy key positions in the film industry elsewhere in the UK and globally and who are also committed to supporting the Scottish screen sector.
10. We believe that an autonomous body, with its own Board and decision-making processes, would have the opportunity to work closely with the sector. We have learnt about the diversity of the sector. It includes factual and drama producers and directors, writers, set designers, actors, casting agents, post-production staff, game developers, crew with a range of skills, animators, promoters and distributors. One person cannot embody and represent that sector on a wider Board in Creative Scotland. Close engagement with the sector is central to a strong vision and leadership, whilst also giving “Screen Scotland” greater leverage to negotiate with key actors to promote Scotland as a location, as well as to ensure a greater cultural representation of Scotland.

Transforming the Screen Unit into "Screen Scotland"

11. We intend to publish a full report in June 2018 when we have completed our inquiry, but by publishing this report now we would like to signal that the Scottish Government should establish a stand alone screen agency for Scotland. Our full report will set out the evidence base and make the case for a stand alone screen agency in more detail.
12. We recognise that the establishment of the Screen Unit is underway and that there is widespread support for its development. We therefore believe that work should continue on the Screen Unit, but plans should be developed for how it can be transformed into a stand alone agency.
13. To have full autonomy, "Screen Scotland" will require to be an Executive Non Departmental Public Body (NDPB) This will need legislation, and we recognise that it may take some time. We therefore recommend that an independent interim board be established to oversee the transformation process. This board should include experts from different sectors within the industry. It should consult the sector and make full use of the expertise offered by Scots who have made international careers in the screen sector.

