

Contemporary UK Film Policy in a Historical Context

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Abstract

The UK film industry is in prosperity as well as in crisis. At this crossroads, film policymaking matters, as it aims to identify the key challenges facing the film industry and to develop solutions that might re-orientate the development of the industry. This thesis aims to bring to light the key aspects of contemporary UK film policymaking and examine how they were developed in a historical context.

The thesis first examines the key film policies from 1909 to 2010. Arching over the historical development of film policies, the first two chapters define the dimensions of UK film policy and focus on the economic and socio-cultural issues they have sought to address. They also outline how historical developments have affected contemporary policymaking, including the impacts of two strategic film institutions: the British Board of Film Classification (BBFC) and the now-abolished UK Film Council (UKFC).

The subsequent four chapters explore contemporary film policymaking from 2010 to the present and discuss the role of film policies in shaping the contemporary film industry. First, the British Film Institute (BFI)'s new role as the lead body for the UK film industry is explained, against the backdrop of government policy. Subsequent chapters examine the BFI's international strategies, including co-production, in the light of geo-political shifts, such as Brexit; and the government and the BFI's interventions during the COVID-19 pandemic. Finally, this thesis analyses the BFI's newly launched 10-year strategy, in the face of the challenges of the post-Brexit and post-pandemic era, and how the government and the BFI should develop policy as a tool to support the future film industry.

The research undertaken for the thesis incorporates from policy documents, interviews, newspaper reports, film magazines and other archival sources, as well as existing academic studies.

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This thesis is dedicated to the memory of my grandfather, Zhaochang Zhou (1929-2021), who loved to travel and read.

Declaration

I declare that this thesis is a presentation of original work and I am the sole author. This work has not previously been presented for an award at this, or any other, University. All sources are acknowledged as References.

Chapter 1

Introduction

In the last decade, geopolitical changes, the Black Lives Matter movement, the COVID-19 pandemic, and digitisation and the rise of streaming have significantly affected the development of the global film industry. Meanwhile, there are also some other very significant developments that have affected the British film industry in this period, the election of a Conservative-led government, their decision to close the UK Film Council, the transfer of film policy responsibilities to the British Film Institute and the subsequent Brexit. In this context, discussions about film policymaking and the future of the UK film industry have once again come to the fore.

Government policies developed during the COVID-19 pandemic highlight the vulnerability of the film industry, as well as the importance of government and institutional support when the film industry faces crises. Meanwhile, the rapid changes in film production, distribution and exhibition sectors resulted in the increased uncertainty for filmmakers in the post-Brexit and post-pandemic era. In this context, it is sometimes necessary to have a public support system for film and culture, while the government is also expected to keep an arm's length from the industry. This leads to a question of what the relationship between the film industry and the government should be in the UK. It also raises the question of how government interventions have affected the development of the film industry, both historically and in the present.

Such questions have been frequently asked on different occasions. For instance, in November 2002, Sir Alan Parker (2002), the founding chairman of the UK Film Council, made a keynote speech about “Building a sustainable UK film industry”. In this speech, regarded as a bold and controversial one, Parker tried to answer several significant questions: Firstly, how did the film

industry develop and what can we learn from recent history? Secondly, what kind of film industry does the UK have now? Thirdly, what kind of film industry should the UK be aiming to create in order to fulfil its creative and industrial potential? And finally, what film policymaking and government measures could contribute to these goals? More than 20 years later, these remain important questions for anyone looking at British cinema. While all of these questions have some place in this thesis, I focus on the last question, examining UK film policymaking and the government and institutional measures that followed, looking at historical developments but focusing on the contemporary context.

Following Parker, the overarching research question of this thesis is: What are the key aspects of contemporary film policy in the UK? To interpret this question, there are further questions emerging from it. First, how did UK film policy develop over time? Answering this question helps us to understand why contemporary film policy takes the shape it does. This also leads to a second question: what can we learn from that historical development? Thirdly, how does the contemporary film policy shape the film industry as it is nowadays?

To answer these questions, it is important to understand the historical development of such policies and the film industry itself, since contemporary policy has clearly evolved from past developments. This study therefore briefly considers the historical processes and key policy themes that influence current film policies, as well as the government interventions themselves. I give substantially more attention to contemporary film policymaking from 2010 to the present, from the election of the Conservative-led coalition government and its closing of the UKFC in 2010 to the BFI's new 10-year strategy, launched in the autumn of 2022. I also note the impact of those policy developments on the contemporary film industry, which is to a large extent built on the basis of the policies that emerged in film history.

It is worth pointing out that the thesis does not discuss every piece of legislation or policy associated with the film industry. Instead, I will emphasise some of the most important landmarks in the development of film policymaking. As such, I do not intend to provide a definitive history, because the scope of that study would be too broad; rather, I plan to illuminate some of the critical milestones in the development of British film policy over the last 110 years and formulates an argument about how policymaking has shaped the contemporary film industry.

Meanwhile, I shall also discuss film policies from various dimensions. As I.Q. Hunter et al. (2017) argue in the context of British cinema history, “culture itself is not entirely determined by profit and loss accounts, so economic histories are not the only worthwhile or definitive approaches.” (p. 1). Given these circumstances, I will thus be discussing film policymaking from both economic and socio-cultural perspectives, examining both the patterns of historical development and the development trends of these two types of film policy in recent years.

Even when I am dealing with the contemporary period, I adopt what can broadly be understood as an historical approach to the period from 2010 to the present. More precisely, I adopt the distinctive approach of what has been called the New Film History. Instead of rewriting it, the New Film History approach changes the interpretations of film history. To identify what is ‘new’ about this approach and why it is distinctive, it is necessary to outline the ‘old’ approach to film history study. James Chapman et al.’s (2007) *The New Film History* summarised the characteristics of traditional film history, where research focused on the history of film either as an art form or as a mirror of society. They explain that both of these paradigms have narrowed and simplified film history. Furthermore, they locate the first recorded use of the term “New Film History” (Elsaesser, 1985), in a review article, in which Elsaesser asserted there was a tendency for scholarly works to move beyond simply analysing film content and its social values to note the economic, industrial, and technological factors in film history. Moreover, other scholars, such as Richard Maltby, Daniel Bilterest and Philippe Meers (2011) use the slightly different concept of New Cinema History in their work, as they revisit the prevailing social and cultural connections, rather than perceiving the film text as an object to be placed in a pre-established historical context. In both cases, this new approach to historical investigation “draws on primary and archival resources to explore the socio-economic determinants and effects of film culture, and shifted emphasis from textual analysis (with the inherent pitfalls of reflectionist readings of cinema’s relation to society) to evidence-based accounts of the political economy of entertainment and the material texture of popular pleasure.” (Hunter et al., 2017, p. 1).

In terms of this thesis, I shall look at the history of UK film policymaking, and especially the history of the contemporary period, in a wider historical context and bring in new historical evidence and data. Taking this approach

demands an enquiry into the relationship between government and the historical process of film, which includes asking questions about social context, economic constraints, and cultural dynamics. This thesis is therefore not a history of films, but a history of film policies and their impact on the film industry. While contributing to the study of New Film History, this thesis also uses primary sources to examine contemporary film policymaking with a view to bringing out original arguments.

1.1 Literature review

In introducing this broad overview of UK film policy, it is important to examine the previous works that have established this research field. Noting the variety of previous studies, the thematic review that follows is divided into two sections: film socio-cultural policy and film economic policy. In this context, the progression of time remains an essential factor, and the review shifts between time periods while examining different studies.

First, there are general studies of British cinema. These include Rachael Low's (1949, 1950, 1971, 1979, 1985) extensive surveys of the first half century of British cinema, as well as a number of more recent studies of British film history. George Perry's (1985) *The Great British Picture Show*, and Charles Barr's (1986) *All Our Yesterdays*, each provide useful information on a wide range of interesting topics in general British cinema history, but they have become dated. There are also studies dedicated to the film business and UK society in the early 20th century. For instance, Luke McKernan (2007) examined how the film industry developed in London from 1894 to 1914, whereby he discovered the dynamic spread of cinemas throughout London, as well as documenting London's leading role as a worldwide centre for film. Meanwhile, Jon Burrows and Richard Brown (2010) identified the growth of film exhibition in the UK between 1910 and 1914 from a new economic perspective, whereby he emphasised the important role small-scale business people played in the Edwardian cinema 'boom'.

Sarah Street's (2009) *British National Cinema*, Justine Ashby (2013) and Andrew Higson's (2013) *British Cinema, Past and Present*, Amy Sargeant's (2005) *British Cinema: A Critical History*, and Robert Murphy's (2019) *The British Cinema Book*, offer more recent and useful insights with a wide range of writers charting different periods of time. However, rather than piecing

together a cohesive narrative of British film and film policy, some of these books offer introductory essays on a rich variety of topics. Although they have helped provide an overview of major issues in British film history and debates about British cinema, they do not capture a consistent evolution in the film industry and government policy or build a coherent argument about the relationship between cinema and the state from economic and socio-cultural perspectives. The more recent studies have covered British cinema in the relatively contemporary period, such as Neil Archer's (2020) *Cinema and Brexit: The politics of popular English film*, Geoffrey Macnab's (2018b) *Stairways to Heaven: Rebuilding the British Film Industry* and John White's (2022) *British Cinema and a Divided Nation*. These books provide a timely and politically-engaged backdrop for the contemporary national cinema.

There have also been various more selective contributions concerning more specific topics. One strand of work focuses on the impact of film on society, and such work connects film socio-cultural policy to debates about film censorship and the work of the British Board of Film Classification (formerly the British Board of Film Censorship; BBFC), and debates about censorship and film classification. Edward Lamberti's (2012) *Behind the Scenes at the BBFC* discusses multifaceted aspects of the BBFC from the silent era to the digital age. Annette Kuhn (2016) investigates censorship and the film industry in her book *Cinema, Censorship and Sexuality, 1909–1925*; she boldly argues for a move beyond the 'prohibition versus institution' dichotomy and instead addresses film censorship as it relates to power, rather than as an object in itself. James C. Robertson's (1993) *The Hidden Cinema: British Film Censorship in Action, 1913–1972* also details the censorship negotiations between the BBFC, production companies, local authorities, and extra-parliamentary critics. Julian Petley's (2011) *Film and Video Censorship in Modern Britain* examines how film and video censorship was maintained and strengthened from the 1980s to the 2000s and critically questions the role of the government in censorship.

Today, the topic of film censorship and classification in the UK may not be the centre of debate in film studies, while the study of new aspects of socio-cultural policy has emerged in the last decade. Clive James Nwonka, for instance, has focused on diversity and inclusion policy and has written several insightful articles, such as "Diversity Pie: Rethinking Social Exclusion and Diversity Policy in the British Film Industry" (2015) and "The New Ba-

bel: The Language and Practice of Institutionalised Diversity in the UK Film Industry” (2020a). Nwonka examines the BFI diversity standards and the cultural diversity agenda in his latest article “Diversity and data: an ontology of race and ethnicity in the British Film Institute’s Diversity Standards” (2021). These studies examine the relationship between the government, diversity policy and institutions, and they have provided distinctive insights and critical perspectives. However, these studies mainly focus on the contemporary period, from the 2000s to the present. Therefore, it is worth looking at diversity in history and in a broader definition, questioning whether policies relating to diversity can be seen to have developed in the film industry before the concept emerged as a central concern in the new millennium.

In parallel with film socio-cultural policy, this thesis will also examine the development of economic policy. Film economic policy studies differ from socio-cultural policy studies because they discuss industry, culture, institutions, politics, and trade. Margaret Dickinson (1985a) and Sarah Street’s (1985a) *Cinema and State: The Film Industry and the Government, 1927–1984* is the key publication here, but it does not deal with the past 40 years of policy development. No other book has been published that studies film economic policy chronologically from the past to the present; instead, studies of British cinema tend to concern issues and themes in individual decades. There are two ways to examine these various secondary sources.

The first way is to examine by author. Several scholars have maintained a professional interest in the economic value of film or the relationship between economic policy and the film industry and have contributed useful insights across a range of publications. John Hill’s (1999) *British Cinema in the 1980s* includes a chapter on British cinema and Thatcherism and the policy changes in this context. His later articles, such as “Government Policy and the British Film Industry 1979–90” (1993), also provide an overview of and a critical argument about the Thatcher government’s film policy. “Living with Hollywood: British Film Policy and the Definition of Nationality” (2016) and “This Is for the Batmans as well as the Vera Drakes: Economics, Culture and UK Government Film Production Policy in the 2000s” (2012) focus on film cultural policy and its economic impact and bring the narrative into the contemporary period. In doing so, Hill suggests there has been a certain degree of blurring between the economic and cultural policy, and between national and transnational cinema.

In addition, Andrew Higson's (1995) *Waving the Flag: Constructing a National Cinema in Britain* includes a chapter that deals with the economic conflicts between the Hollywood industry and British cinema. His later book *Film England: Culturally English Filmmaking since the 1990s* (2011) also takes a look at the historical development of film policy and the definition of British film that emerged in this context.

Apart from *Cinema and State* (Dickinson & Street, 1985a), which details the economic film policies developed between 1927 to 1984, Street's (2009) *British National Cinema* also analyses the politics of films and critically questions why British film-making has always been subject to government apathy and financial stringency. One of her chapters, 'The Fiscal Politics of Films', outlines the main chronological developments of film economic legislation from the 1920s to 1990s and establishes the difficult context in which producers and directors have worked. At the time of writing this book (1996), she disapproved of the government's actions and concluded that there was no sign of a stable film production industry.

Nathan Townsend's (2021) *Working Title Films: a creative and commercial history* not only has a history of Working Title film from the 1980s to the 2010s, but also adopts a more contemporary view to examine the concept of Transatlantic British Cinema through the lens of the political economy of film.

Meanwhile, instead of conducting continuous research in the development of film policy in the new millennium, in the past decade, other scholars have adopted a new approach to early British cinema studies. For instance, Jon Burrows (2010) and Richard Brown's (2010) "Financing the Edwardian Cinema Boom, 1909–1914" and Burrows's (2018) "Certificated Operators versus Handle-Turners: The British Film Industry's First Trade Union" represent an increasing interest in research about the early film industry from the perspective of the economy.

The second way of reviewing previous work on film economic policy is by subject. Several publications focus on the significance of key policy developments. Jonathan Stubbs (2009), for instance, focuses on a production fund introduced in the 1940s, in "The Eady Levy: A Runaway Bribe? Hollywood Production and British Subsidy in the Early 1960s", while James Caterer (2011) looks at The National Lottery funding in the 1990s, in "Reinventing the British Film Industry: The Group Production Plan and the National Lottery Franchise Scheme", and Magor (2009) and Schlesinger (2009) focus on tax relief

in the 2000s, in “For This Relief Much Thanks: Taxation, Film Policy and the UK Government”. More substantially, Gillian Doyle et al’s (2015) *The Rise and Fall of the UK Film Council* provides a solid study of the UK Film Council from 2000 to 2010. David Hesmondhalgh et al (Hesmondhalgh, Oakley, Lee, & Nisbett, 2015) also examine a range of cultural policies under the Labour party between 1997 and 2010, including creative industries, film policy and regional policy, which will be further discussed in this thesis.

In addition to the previous studies, I will also draw on different types of primary sources in the thesis. It is worth noting here the crucial roles such sources play, as they are essential to the research of contemporary film policy-making. The primary sources used for this study consist of three types. The first is legislative texts, which include authorities’ reports and publicity materials, which are the main source for understanding current film policy. Since the 2000s, the government and film institutions have taken more responsibility in helping the film industry become self-sufficient. They have also become more open to public scrutiny. Various reports such as *Film Policy in the UK 2000–2010: A Report for UK Film Council* (2011a), *DCMS Film Policy Review Report 2012* (2012), and *BFI Plan 2017–2022* (2017d), and the latest 10-year vision for UK screen culture and industry *Screen Culture 2033* (BFI, 2022f) can be easily accessed online. These reports are vital for reviewing governmental arrangements and providing guidelines for the industry. They also provide scholars with insight into the development strategies of different institutions. Furthermore, by examining the topics covered, one can interpret the British government’s current concerns and potentially foresee future film policy development.

This thesis also draws extensively on two types of primary sources. First, there are media created at various points in time, such as British news archives, trade journals, interviews, film yearbooks, and the Hansard parliamentary archives. Using such sources is an approach taken by the New Film History movement, which underlines the critical importance of examining primary sources. Currently, the trade press such as *Screendaily* and *Variety*, as well as mainstream publications such as the *Guardian*, which cover the media business, are essential for analysing the film industry’s dynamic developments and its reactions to government policies.

The second type of primary source used in this thesis is interviews and professional debates. These materials often supplement gaps in scholars’ stud-

ies, provide a unique insight into the film industry, and help to forge a greater connection between academic work and the industry. In some cases, I draw on published interviews; in others, I have undertaken the interviews myself.

The existing scholarly studies of British cinema have provided a solid foundation to this thesis, but studies of film policy either do not come up to date, or focus on very specific aspects of contemporary policy. Existing studies that examine film policies after 2010 have often neglected the connections between the contemporary policies and the historical ones. There is therefore a need for a greater focus on the relationship between historical and contemporary policy development. Thus, it is important not only to re-examine film policies developed in the past, but also to draw lessons from this history, questioning whether the contemporary film policies will contribute effectively to the UK film industry in the future. There is also a need for a more comprehensive survey and analysis of contemporary UK film policy. That is what this thesis provides. As such, it contributes to the growing body of scholarship about both British cinema and film policy. It does this by drawing on both primary and secondary sources, thereby examining historical film policies from a modern perspective, while looking at contemporary film policies in the light of history.

1.2 The organisation of the thesis

This thesis is divided into eight chapters, including the introduction and the conclusion of the thesis. Chapters 2 and 3 provide an overview of different types of film policy and legislation, as well as the historical development of film policy and legislation in the UK. Chapters 4, 5, 6 and 7 cover the most important aspects of contemporary policymaking from 2010 to the present. These include the development of the BFI since 2010, the BFI's international strategy, the impact of the COVID-19 pandemic on the screen industry and screen policy, and the BFI's strategy for the next 10 years.

The discussion of contemporary film policies and strategies takes up a larger proportion of the thesis than the historical review, not only because various scholars have already done rather comprehensive research on British film history, but also as this thesis is intended to contribute some original analysis, standing on the shoulders of giants. Therefore, while the historical context and the existing scholarly debates are the cornerstone of discussions

of contemporary policy, I give more attention to the contemporary materials, as these policies may not only be directly shaping the current film industry, but might also affect the decisions of policymakers in the near future. I will now explain what I do in each of the main chapters of the thesis.

Chapter 2

Chapter 2 analyses several dimensions of UK film policy. In doing so, this chapter sets the scene for the policies that will be discussed in the thesis. I shall define the use of the terms ‘policy’, ‘legislation’ and ‘strategy’ in different circumstances. I also introduce the idea of national cinema and its relation to policy development. While film policies often reflect policymakers’ opinions about what national cinema ought to be at different times, the changing understanding of British cinema also directs the development of government policy.

In this context, I take a few historical and contemporary film policies as examples, to demonstrate that the industry and the government’s attitudes towards British cinema as a national cinema have significantly changed in the last century. I also demonstrate that government interventions have developed from protecting a national cinema to promoting a national cinema. For instance, film legislation in the 1920s was designed to protect the UK’s national cinema from Hollywood’s domination, while the contemporary view of national cinema is to establish a commercial and international British cinema, which largely depends on inward investment from Hollywood.

In addition, to achieve a better understanding of the characteristics of various film policies, I intend to categorise film policies into two types: film socio-cultural policy, and film economic policy. As the names indicate, socio-cultural policy concerns the social and cultural aspects of policymaking, while economic policy often reflects the economic imperatives of the day. By analysing their definitions, I intend to examine the development of UK film policy in a thematic order in this thesis, adopting the terms of socio-cultural policy and economic policy. The terms can not only be applied to historical film policies to distinguish them, but can be also used to examine the purposes and effects of contemporary policies, as well as to explore the connections between contemporary and historical film policymaking.

However, it is worth noting that there has been a certain blurring of distinctions between these terms, such as in the merging of economic and cultural

policy, or national and transnational cinema. Thus, in the last part of Chapter 2, I discuss the complexity of film policy and explore how these policies, obtaining multiple characteristics, have been shaped by the government's new policies and strategies in recent history.

Chapter 3

Chapter 3 uses the terms of socio-cultural policy and economic policy to examine the historical development of film policy from the 1909 Cinematograph Act to the closure of the UK Film Council (UKFC) in 2010. Some of the themes I focus on include the value of the first film legislation, the analysis of key socio-cultural and economic film policies, the examination of how the creative industries have evolved to become what they are today and what the UK Film Council contributed in its decade long existence.

There might be doubts as to why I shall be examining the Cinematograph Act of 1909 in some detail, since it is no longer in force and has little effect on the contemporary film industry. However, the Cinematograph Act of 1909 was the first piece of legislation in the UK to directly regulate the film industry and its unexpected results have contributed greatly to the development of the industry and policymaking in the last century. For instance, the Act helped usher in the beginning of the modern cinemas and the era of film censorship. To some extent, it is impossible to ignore the 1909 Act as I discuss the subsequent socio-cultural policies.

The first legislation unintentionally provided local authorities with the legal basis to censor films, and as a consequence indeed provoked the creation in 1912 of the British Board of Film Censors (BBFC). The BBFC initially aimed to regulate the film content within the industry, and took on a role as a moral gatekeeper that shaped film culture on screen. Over the years, it inevitably faced social changes and new technological developments that repeatedly challenged the prevailing terms of film censorship policy in the past 110 years. However, despite these changes, the BBFC has managed to keep an arm's length from the authorities, it has also provided filmmakers with certain freedom and resulted in a diverse range of content on screen available for different audiences. In this respect, although diversity and inclusion policy in the film industry has more obviously entered the spotlight in the last two decades, the topic has a wider political background and historical context. The BBFC became the British Board of Film Classification in 1984.

I will also discuss how cinema and audiences' habits have mutually shaped each other to the present day, starting with the Cinematography Act 1909. By discussing the history of cinema-going, this chapter gives some historical perspective on the heated debates about how audiences will watch films today, particularly after the pandemic.

To look at the BBFC is primarily to look at socio-cultural policy. I also look at the historical development of UK's film economic policies. In particular, I introduce John Hill's typology of historical periodisation to examine the development of British economic film policies, using his terms 'protectionist', 'interventionist', and 'market-friendly' (Hill, 2016) as reference points. Drawing on Hill, I identify three distinctive stages of the UK film economy from the 1920s to the 2000s, and question whether the protectionist, interventionist, and market-friendly dimensions can coexist in economic policy.

In the context of film economic policies, I further discuss the international co-production policy and practice in British film history, as the government's endeavour in forging international co-production agreements could be regarded as a interventionist approach, as well as market-friendly one. By looking at the UK's international co-production with the US, the EU and the Australia in a historical context, I shall analyse the different characteristics of their collaboration models and the UK's demands in each model.

In the next section of this chapter, I focus on the government's strategy of promoting cultural and creative industries. Since the 1980s, economic policy-making in the area of film has been expected to contribute to the UK economy, and the cultural objective has also often had economic purposes. In this context, the development of the idea of a UK creative economy has to a great extent represented the unification of economic policy and cultural policy in the film sector. This, will enable me to explore how the relationship between economic policy and socio-cultural policy has changed in the film industry and what this means for today's promotion of the creative economy.

Finally, in this chapter, I look at the UKFC's contributions to policymaking from 2000 to 2010, focusing on several key policies that emerged in the period. The tax relief policy and Culture Test can be seen as the most significant government economic interventions that have shaped the film industry as it is today. The tax relief policy has clearly benefited both inward investors and some domestic filmmakers, while the Cultural Test became a certificate to access the tax incentives. It also indicates a new trend in film policymaking

that has a strong economic purpose under the cover of cultural representations. Standing in line with the Labour Government's goal of creating a creative economy, the UKFC's strategy to develop the film industry in the nations and regions also aimed to benefit the local economy by increasing investment in the film industry. Meanwhile, the UKFC's diversity agenda pioneered the promotion of diversity and inclusion through production subsidies, and its efforts became the legacy that still to a great extent shapes the BFI's diversity policy.

Chapter 4

Chapter 4 focuses on contemporary UK film policy and discuss the important changes in UK film policymaking from 2010 to the present. One of the most significant changes in the last decade has been the new role of the British Film Institute (BFI). Founded in 1933 to promote the art and education of film, the BFI became the national lead body for film after the UK Film Council was abolished. In this sense, the BFI has taken over the UK Film Council's function and funding, becoming responsible for economic support to the film industry, meanwhile also retaining its original cultural role for art and education. This chapter therefore explores the new role of the BFI with regard to film policymaking and examines the result of merging economic and cultural institutions under one body.

Looking at the BFI's two five-year strategies: *Film Forever*, published in 2012 and *BFI2022*, published in 2017, they not only represented the BFI's support to the industry, but reflected trends in the BFI's strategic priorities at different stages. At the end of the period covered by *BFI2022*, it is also necessary to recognise the achievements of those policies but also the ongoing challenges that are faced by the industry. Only by acknowledging these challenges will the BFI be able to make its strategic plan for the next stage work effectively.

I also discuss diversity and inclusion policy in a separate section of this chapter. There is no denying that the BFI has been promoting diversity and inclusion as an important socio-cultural policy. On the one hand, the emerging global trends, such as the #OscarsSoWhite and the Black Lives Matter (BLM) movement, have resulted in a push for a greater diversity and inclusion in the UK film industry. On the other hand, the UK had pioneered the pursuit of equality and diversity in society. In this context, the BFI inherited the

UKFC's idea of promoting diversity and inclusion in the UK film industry. However, the design of the BFI Diversity Standard has been controversial; while the BFI has shown that it is determined to change the composition of the UK film industry, the deficiency of the measures is also obvious. Thus, it is necessary to examine the effects of the BFI's diversity policy, in the frame of the existing government policies.

Chapter 5

Chapter 5 discusses the BFI's international strategy for the UK film industry since 2010. This chapter provides a comprehensive examination of the BFI's international strategy and considers emerging film policies in the globalised context, and especially the challenges that the UK film industry faces in the post-Brexit era. In this respect, I put the focus on UK international film co-productions and the newly established UK Global Screen Fund in 2021.

The UK film industry has cooperated with the US and European countries since its earliest stages, and in the contemporary era, "co-producing allows pooling of creative, financial and technical expertise and resources as well as a sharing of risk." ([We Are UK Film, 2018](#)). Furthermore, international film co-production has been regarded as a significant cultural and economic collaboration in a transnational context. On the one hand, economically, co-production is expected to attract inward investment and help producers get access to other markets. Culturally, it may boost the UK's soft power. Thus, the UK has applied tax relief policy to those co-produced films and television programmes that qualify under one of the UK's official co-production treaties. Despite these merits and benefits, international co-production may still face various political or cultural challenges.

This chapter takes China-UK co-production and UK-Australia co-production as examples. Both China and Australia have signed official bi-lateral co-production treaties with the UK, thus their co-productions not only are able to access the UK's tax relief scheme, but also may receive various benefits in the partner's country. However, it is evident that the co-production treaty alone is insufficient to guarantee successful cooperation between two countries. This chapter therefore discusses the elements that may contribute to a successful official co-production film. It also draws on interviews I conducted with senior managers at the BFI to understand where the BFI's new strategy in international co-productions will take the film industry.

Meanwhile, there is no denying that Brexit has affected the BFI's international strategy. For instance, the withdrawal from the Creative Europe programme resulted in the lack of funding for British independent cinema and caused a certain amount of damage to the idea and practice of cultural exchange. Under these circumstances, the UK Global Screen Fund is a new scheme introduced in 2021, which aims to increase international development and distribution opportunities for the UK's independent screen sectors. To some extent, the UK Global Screen Fund is expected to play a similar role to that of Creative Europe. As a one-year pilot fund administered by the BFI, there has been limited information published about the scheme; therefore, I conducted interviews to collect primary data on why it was formed and what results it may achieve.

Chapter 6

Chapter 6 focuses on the impact of the COVID-19 pandemic on the UK screen industry and screen policy. This chapter was not what I had planned at the beginning of my PhD, however, the abrupt outbreak of the COVID-19 in Wuhan, China soon resulted in the global pandemic. Not only did the highly infectious virus have a great impact on population health, but it has also resulted in national lockdown in the UK, and inevitably brought about huge changes for the film industry.

To some extent, just as people with weakened immune systems or certain diseases have faced higher risks in the pandemic, so the pandemic has amplified the potential crises and devastated the weak links in the contemporary film industry, such as the independent film productions. In this context, the pandemic could have resulted in long-lasting effects and the industry's recovery certainly required various government interventions and support. Since there has been scant academic research in this area, this chapter aims to survey the UK government's measures in response to this unprecedented pandemic and examine whether the current film policy and schemes may help the film industry to recover.

Drawing on a wealth of information and primary sources, I will examine challenges for the production, distribution and exhibition sectors during the pandemic. The film production sector faced the most severe challenges during the national lock-downs and was forced to pause for a few months. The exhibition business also went through the unprecedented challenges, as the closure

of cinemas not only resulted in a loss of income, but Hollywood's decision to stream blockbusters online also put the UK cinemas in crises, due to the lack of content after the cinemas reopened. Meanwhile, we should not forget that audiences' viewing habits were also greatly affected by the closure of cinemas and the growth of online-streaming.

By analysing the challenges to the UK society in general and the screen industries in particular, and examining what the government's responses were, it is clear that the government's interventions aimed to provide the industry with economic and socio-cultural support. Not only did the government, organisations and corporate initiatives provided subsidies to the film business, but the BFI also regularly published schemes and guidance to support the UK film industry. The last part of the chapter therefore examines what these measures are and whether they were effective during the pandemic.

Chapter 7

As the last chapter of the thesis, Chapter 7 looks at the film industry in the present and near future, in the light of recent policymaking. Following on from the examination of the government's measures and the BFI's response to the film industry, I will first discuss the situation of the film industry in the post-pandemic era. To some extent, although the government helped the film industry survive the pandemic, the BFI's strategy and the circumstances in different sectors have inevitably been affected. Thus a new analysis of the present stage is required.

In this context, we can see that while the production sector bounced back quickly from the pandemic, the increasing inward investment has also had socio-cultural consequences. In particular, the independent sector may face further crises without necessary interventions, as it is weakened by skills shortages and the escalation of production budgets. In this sense, the challenges facing the independent sector are not only economic but also socio-cultural, concerning the idea of national cinema and the skilled workforce. Along with another uncertain factor, Hollywood's new distribution model and the growth of streaming platforms are bringing about in the audience's viewing habits, it seems the time has come for the government and the BFI to revisit film policy and strategy, which is their tool to support the film industry.

Therefore, in the second part, I offer an analysis of the BFI's latest 10-year strategy *Screen Culture 2033*, on the basis of the available materials at the

current stage (the strategy was only published in September 2022). Notably, the BFI proposed an innovative digital-first approach with the design of a new online portal, BFI+. Although BFI+ might not be ready in the short term, its creation will enable the BFI to become a streamer of, as well as an investor in, independent films. In this sense, the BFI aims to generate the membership fee to subsidise and invest in independent filmmakers, in order to make up for the loss of lottery funding from the government.

Looking at the near future, the film industry is oriented to become increasingly important as part of the creative economy. However, behind the surface sheen of prosperity, the industry also faces unprecedented challenges in both economic and socio-cultural terms. In this context, the government and the BFI's policies and strategies appear to be even more important to prepare the film industry for the next decade.

This thesis therefore is intended to contribute to those discussions about the future direction of the film industry and the film policymaking that is needed to shape the fortunes of the UK film industry today. In the meantime, history is a mirror that reflects the past and sheds lights on the present, and what is valued by us from the past often reflects what is important to us in the present. That's why I will start the thesis with Chapter 2 and Chapter 3, taking the New Film History approach to portray those selected film policies in their historical context.

Chapter 2

The dimensions of UK film policy

This chapter identifies and defines the various dimensions of policymaking that concern the UK film industry. As the understanding of the dimensions of film policy will be the foundation of the whole thesis, this chapter aims to provide a comprehensive overview of the characteristics of film policy, across the history of the film industry and in the contemporary era. In doing so, this chapter will categorise different film policies, while acknowledging the inevitable boundary crossing between these different types of policy. While policymaking has significantly shaped the UK film industry, the development of the industry has also contributed to changes of policy.

I shall first distinguish the use of the terms ‘legislation’, ‘policy’ and ‘strategy’ in this thesis, as the evolution of these terms also reflects the development of the film industry and shifts in the nature of government intervention. Second, I shall introduce the idea of national cinema, as a key theme that affects policymaking in the historical context and in the contemporary era, I intend to compare how national cinema was defined historically with how it is seen in the contemporary era, to examine how the understandings of national cinema and film policymaking have mutually shaped each other.

Subsequently, I shall define socio-cultural policy and economic policy as two essential types of film policy considered throughout the text. In particular, I explain the innovative use of the combined term ‘socio-cultural policy’, which has not been widely used in film policy studies. I shall use examples to demonstrate why socio-cultural policy is the most suitable term to describe

film policies that have both social and cultural impacts on the film industry.

Finally, I note the blurred boundaries between ‘economic’ and ‘socio-cultural’ policymaking, as well as the development of ‘regional’, ‘national’ and ‘international’ policies and strategies, and the reasons behind those developments.

2.1 The distinctions between ‘legislation’, ‘policy’ and ‘strategy’

This thesis deals in various ways with film-related legislation, and policy and strategy as developed by central government and by national agencies. It is important therefore that I distinguish the differences between ‘legislation’, ‘policy’ and ‘strategy’, and how these terms will be used in this thesis.

Film legislation refers to laws, enacted by the UK Parliament, governing the film industry and how films are made and shown. According to Daithí Mac Síthigh (2014), “The law of film is a wide-ranging set of provisions and practices, spread across statutes and court decisions but capable of being studied as a system. Law affects all three of the historic divisions drawn by film historians between the sectors of production, distribution and exhibition.” (p. 1). Michael Brooke (2013) also suggests that film legislation falls into four categories, including,

Cinema legislation - which governs the running of cinemas, specifically licensing and health and safety issues. Content legislation - which seeks to define suitable and unsuitable material for exhibiting on cinema screens. Quota legislation and Financial legislation.

In this context, the Cinematograph Act 1909 could be categorised as Cinema legislation. The Video Recordings Act (VRA) 1984 may be regarded as Content legislation. The Cinematograph Act 1927 is clearly an example of Quota legislation. Finally, the 1950s ‘Eady levy’ can be seen as an example of Financial legislation. However, the legislative measures were often multipurpose and led to various results, which I shall further analyse in this thesis.

Film legislation has been essential in regulating the film industry from 1909 to the present. Some of the most important legislation affecting the film industry in the contemporary period regulates National Lottery funding (the National Lottery Act was first introduced in 1993), tax relief (initial measures were established in the 1990s and substantially revised in the Finance Act

of 2006) and responsibility for developing and administering aspects of film policy by first the UK Film Council (UKFC, 2000-2010) and subsequently the British Film Institute (BFI, 2010 to the present).

These various pieces of legislation have significantly impacted the UK film industry over the course of the last century and more and are the result of policy developments at government level. In this sense, film policies can be seen as providing a mould for future legislation; in other words, film policy becomes enshrined in legislation. Both film policy and legislation have played an essential role in shaping the film industry, which, in turn, has shaped how policy has developed over the years.

The *Oxford English Dictionary* defines policy principally as a course of action adopted and pursued by a government, party, ruler, statesman, etc. In a political context, “policy is the content or material dimension of politics. It covers the objectives and roles through which political solutions are to be found to specific problems.” (Christian, 2015). Thus, “policies are a set of general guidelines” (PowerDMS, 2020) to organisations and institutions. In the film industry, a policy is a statement of intent, such as is often adopted by a governance body or an organisation. In this sense, it may be implemented as “a law, regulation, procedure, administrative action, incentive, or voluntary practice of governments and other institutions.” (CDC, 2015). In this thesis, I shall use the term ‘policy’ to describe both government interventions and those of the key agencies, the UKFC in the 2000s and the BFI in the 2010s.

It is also important to note that ‘strategy’ has been widely used in recent policymaking. For example, in 2012, the BFI published a document entitled *The BFI’s International Strategy - The Wide Angle*, as part of its five year plan to support UK film industry. In addition, *Screen Culture 2033*, published in 2022, is presented as the BFI’s new ten-year strategy. It is thus worth investigating the BFI’s decision to use the term ‘strategy’ rather than ‘policy’ in this context.

The term ‘strategy’ denotes an overarching plan or set of goals designed to achieve a long-term or overall aim, “purposefully drawn up in advance of any action.” (Mintzberg, 1978, p. 935). According to Lawrence Freedman (2017),

The word “strategy” first came into use in discussions of military affairs in Europe during the 1770s, but it was not until the 20th century that it acquired the broad meanings now attributed to it and that now tend to be applied retrospectively to past practi-

tioners...Eventually the term became so detached from its military origins to be applied to all fields of human endeavour from sports to business.

From the perspective of film policymaking, policy and strategy often represent different stages in the process by which goals are achieved: film policy deliberately guides the film industry's actions towards the achievement of its desired outcomes in the short term, whereas film strategy typically represents a future vision or goal with a more long-term outlook. For instance, film tax relief has become a particularly significant policy, given that it is a type of tax credit set up by the government and contributes to influence film industry outcomes directly. Meanwhile, *Film Forever* and *BFI2022* constituted the BFI's vision that aimed to guide the film industry's development over the specified period. As the BFI's strategic plans, they not only aimed to secure a better future for the UK film industry but also guided the direction of the BFI's policymaking.

Thus, I use these examples to demonstrate that the terms 'legislation', 'policy' and 'strategy' are differently used to show distinct approaches to setting and achieving goals. Film policy has resulted in various legislative measures that regulate the film industry and how it is able to operate. Strategies are then developed to enable those operations to be undertaken successfully, but also to revise existing policies and introduce new policies. In addition, strategy is more flexible than policy, while policy is also more flexible than legislation. Despite the different forms, they have shared the same goal of developing UK film industry since the British film's early stage. By acknowledging that, I shall use these terms under different circumstances in this thesis.

2.2 National cinema and UK film policy

The idea of cinema in the UK as a national cinema has been one of the most fundamental and dynamic factors affecting UK film policymaking. It has also been a heated topic among scholars since the 1980s, not only because national cinema is difficult to define, but also because different understandings of national cinema have significantly affected film policy from the past to the present.

As Valentina Vitali and Paul Willemen point out, there had been a film industry before there was such a thing as 'national cinema'. According to

Vitali and Willemen (2006),

During the first decade of the cinema, before the practice of leasing films to distributors was established, reels of film were sold directly to exhibitors who screened them as novelty objects without paying much attention to their national provenance. The main way of differentiating product lines was provided by name, and eventually, by the reputation of companies that produced films in different national territories. (p. 1)

Thus, national cinema was not considered as a national brand when films were traded as entertaining products at the early stage, instead, it would refer to the cultural background of those who produced the films. In this context, the concept of national cinema only emerged when films were deemed to have national cultural attributes and functions.

Clearly, film is not a simple commodity, as it has a strong cultural as well as economic value. Therefore, unlike other domestic commodities, a national cinema is not only an important part of the economy, but is also a means of representing the nation to its people and to others. Meanwhile, as Andrew Higson(1989)argues,

Very often the concept of national cinema is used prescriptively rather than descriptively, citing what ought to be the national cinema, rather than describing the actual cinematic experience of popular audiences. (p. 38)

This explains why policymaking can be controversial, as the policies often reflect opinions about what national cinema ought to be at different times, in both economic and cultural terms. As Higson points out that national cinema can be defined in economic terms, with the focus being on the film industry rather than film texts. From this point of view, “the history of a national cinema is the history of a business seeking a secure foothold in the marketplace in order to maximise profits, and to keep a ‘national’ labour force in full employment.” (Higson, 1995, p. 5). Sarah Street has further demonstrated that, while the British film industry has relatively clearly defined economic boundaries and methods of classification, it often produces films that may not necessarily involve British themes or preoccupations, often including financial and labour participation from other countries. As such, she defines British production as “films registered as British, not always dealing with British

subject-matter at an overt level, often seeking to differentiate themselves from films made in Hollywood, while at other times attempting to beat Hollywood at its own game.” (Street, 2009, p. 3)

At the same time, both Higson and Street have highlighted the cultural representation aspect of national cinema. Higson discusses the definition of national cinema in terms of consumption, culture and representation. What affects the nation’s cultural standing includes the popular films on screen and foreign cultural intervention, and in this context, the national cinema is also regarded as a “brand-name that promises audiences a singular and coherent experience.” (Higson, 1995, p. 5). “It is in fact the imaginative product of film culture, [and] what is needed is a history of the critical discourses which form this culture, and not merely a history of films, the objects of other discourses.” (Higson, 1995, p. 13). Street also notes that there is a cultural conception of what we mean by British films, arguing that: “to a great extent, they participate in establishing nationhood as a distinct, familiar sense of belonging, which is shared by people from different social and regional backgrounds.” (Street, 2009, p. 2). While a national cinema has both economic and cultural purposes, it is worth noting that national cinema is a concept generally applied simply to the domestic film industry, even though that industry sometimes aims to achieve cultural and economic impacts abroad.

As such, Nathan Townsend (2021) notes that there have been two versions of British cinema which run in parallel: what he calls Transatlantic British Cinema and independent British cinema.

The former [Transatlantic British Cinema] is defined by economic trans-nationalism, which links British production companies to the integrated financing, distribution and marketing functions of the major Hollywood studios. In contrast, the latter [independent British cinema] is defined by unintegrated configurations of smaller companies which inhabit a wide range of industrial contexts. (p. 28)

In this sense, British cinema clearly occupies two dimensions that often result in different perceptions of national cinema. According to Townsend (2021),

The versions of Britain and Britishness available to cinema audiences at home and abroad are, in effect, circumscribed by this situation which effectively ensures that Transatlantic British Cinema

dominates the mainstream of British and global film culture, while independent British cinema remains at the periphery. (p. 41-42).

This implies that the term ‘Transatlantic British Cinema’, primarily encompasses financial partnerships between the UK and the US film industries, establishing it as a category that also includes inward investment films. (Townsend, 2021, p. 29). According to the definition provided by the British Film Commission, the inward investment film refers to those films that are substantially financed or co-financed by sources outside the UK, predominantly from the US. (British Film Commission, 2022b).

Although there has only been a concentrated academic effort to define national cinema since the 1980s, the idea of national cinema emerged as early as the 1920s in the UK. At this early stage of British cinema, some maintained that national cinema should highlight British national identity and British culture on screen, while many in the UK film industry believed that “with adequate support, British producers could turn out pictures equal and even superior to any producers in world, and it would be a great boon to a whole trade if it were possible to screen ever-increasing numbers of them”. (Unknown, 1923). As such, the filmmakers took making films in the UK and about British culture as the key to national cinema, and their understandings of national cinema also significantly affected the policymaking that went into the Cinematograph Films Act in 1927.

The Cinematograph Films Act of 1927, also known as the Quota Act, is regarded as a representative economic film policy of this early period. The Act obliged film distributors and exhibitors to use a minimum quota of British films, aiming to stimulate the declining British film industry with economic measures. The decline of the British film industry during this period was largely attributed to the overwhelming dominance of Hollywood on the international stage. The dominance of American films in the UK film market served as the driving force behind the implementation of the Quota Act, as it was with all later economic film policy. This policy not only led to the emergence of “quota quickies”, the low-budget British films produced by American distributors or smaller British distributors releasing American films to meet the quota obligations, but also had the unintended effect of supporting the continued distribution of highly lucrative Hollywood films. Nevertheless, the Act also contributed, to some degree, to the promotion of a national cinema. In this context, while I shall further discuss the 1927 Cinematograph Films Act

as an economic policy in Chapter 3, the Act has inevitably shaped national cinema with its unexpected results: quota quickies.

Steve Chibnall offers a further explanation as to why the quota quickies were able to reflect British life and culture, indicating the quota quickies could represent national cinema from a cultural perspective. According to Chibnall (2019),

British studios could safely target the tastes and sensibilities of (primarily) English provincial film-goers and hope for a very modest profit from the legions of independent exhibitors... ultimately, it was the footage that was more important than messages, cultural representations or even profitability, the American renters could leave the producers to their own device once their budgetary limits had been set. (p. 251).

Thus, Chibnall argues that ‘creative control’ of the quota quickies were in the hands of British filmmakers, and the films were mainly made for the indigenous market.

Napper has echoed this point of view, noting that the quota producers “sought to portray England for two specific markets: the lower middle class and the older generation of the working class...the quota quickies produced for these markets responded exactly to the intentions of those who had created the Film Act.” (Napper, 2009, p. 196). Napper also argues there is evidence suggesting that “although *Kinematograph Weekly* regularly recommended British quota productions as fillers ‘suitable for programme material in large popular houses’, many exhibitors would be showing them as their main feature.” (Napper, 2009, p. 197).

As such, the quota quickies might not be the most popular films at the time, but they did reach certain British audiences and represented the non-mainstream British cinema culture to a great extent. Meanwhile, the Act stimulated the productions made in the UK and contributed to the cultural representation of British elements on screen. According to Matthew Sweet (2007), these films “are surprising, vital, funny and outré – material that offers a more reliable guide to 1930s Britain than the big-budget productions of the same period.”

In this context, on the one hand, the ‘quota quickies’ were financed by American investment and played a significant role in the emergence of early

‘economic transnationalism’. This concept, as highlighted by Townsend, “relates to the industrial relationships which link British studios or production companies to financing and/or distribution and marketing for their output via the major Hollywood studios.” (Townsend, 2021, p. 18). On the other hand, the quota quickies largely reflected British culture and society at the time.

Meanwhile, it is important to recognise that they have unexpectedly contributed to the development of independent films and nurtured independent filmmakers. The Quota Act had mixed economic outcomes. On the one hand, it led to the production of many low-quality British films; on the other hand, it fostered significant inward investment in the UK film industry. It is also worth noting that it may have helped Hollywood become a part of an integral British cinema culture that could not be eliminated. The changing landscape of national cinema since the Quota Act led to a rethink of the relations between Hollywood and British cinema. Higson (1989) has attempted to explain that “Hollywood has become one of those cultural traditions which feed into the so-called national cinemas of, for instance, the western European nations.” (p. 39). At the same time, Higson considers national cinemas as non-standard and marginal activities from the perspective of film production, indicating the problem is “the paradox that for a cinema to be nationally popular it must also be international in scope. That is to say, it must achieve the international (Hollywood) standard.” (Higson, 1989, p. 40), at least in those countries where Hollywood is a well-established part of the national cultural experience. The Hollywood standard in productions has thus benefited UK cinema, enabling it to become more transnational, while making it possible for the UK to be an international creative hub in the contemporary period.

While the Quota Act aimed to bring about the exhibition of more indigenous film productions and promote British national films, the urge to establish a commercial and international film industry is a more contemporary viewpoint on British cinema from the perspective of government policy. Tax relief policy and the Cultural Test, which I shall further discuss in Chapters 3 and 4, are good examples of these approaches to contemporary film policymaking.

It can be seen that in the contemporary era, tax relief policy and the Cultural Test work as policy instruments to establish a commercial and international industry. Tax relief policy offers tax incentives to the international and domestic film and TV projects that are qualified as British, while the Cultural Test assesses their economic and socio-cultural contribution to

the UK and determines whether they can be qualified as British. In this context, a contemporary British film is no longer only defined by the nationality of the investors, filmmakers or crews, rather, it is branded to attract inward investment and shows great economic implications. As Neil Archer (2020) noted, “The national cinema supported by policy, in other words, is most often the cinema that is expected to draw the biggest audience, domestically and/or overseas, with whatever kind of narrative and aesthetic content that entails.” (p. 23).

Along with the inward investment films, independent productions have been another crucial part of national cinema. The independent production sector is part of the UK film industry as an economic entity, but that it has often been defended in socio-cultural terms. An industry survey, commissioned by the BFI, defines the UK independent films as “a powerful and vibrant contributor to our cultural lives, a place where creative risks are taken and stories are told that reflect our lives and experiences, often giving a voice to underrepresented people.” (Alma economics, 2022). It is interesting to note that such description of independent films could also be applied to describe the cultural significance of ‘quota quickies’ in the 1920s. While ‘quota quickies’ were the unexpected result of an economic policy, promoting independent films has been an important cultural strategy of the BFI in the contemporary era. These developments not only reflect the changing concept of national cinema, but also, they demonstrate that the idea of national cinema is the cause as well as the result of economic and cultural policymaking.

What this discussion demonstrates is that the concept of national cinema is central to wider discussions of British cinema but also crucially the development of UK film policymaking. To some extent, national film policymaking is a method to promote and reshape national cinema. In this respect, the definition of national cinema has been dynamically changed at different stages of British film history, while the changing landscape of national cinema could further affect the industry and the government’s decision-making about British cinema. This thesis will therefore frequently return to the concept of national cinema in its discussions of UK film policy. In the next part of this chapter, I continue to discuss definitions of economic policy and socio-cultural policy, within the framework of national cinema.

2.3 Socio-cultural policy

Socio-cultural policy covers both the social and cultural aspects of film policymaking. In sociology, social policy is often defined as a plan or action developed by government or institutional agencies which aims to improve or reform society. In other words, it refers to policy that addresses public well-being and society, focusing on “human needs for security, education, work, health and well-being.” (Platt, 2021).

In film studies, some scholars have used this term. For example, Andrew Higson (2011) suggests that “social policy shaped the development of both state-supported documentary and informational filmmaking and a film censorship system in the UK.” (p.40). In such usage, film social policy relates to ideas about the way films might exert an influence on UK society.

Compared to film social policy, film cultural policy has a more complex and debatable definition. David Hesmondhalgh and Mark Banks (2009) note that a widespread definition of ‘cultural policy’ is often defined as “the subsidy, regulation and management of the ‘arts’.” (p. 416), but this definition only applies to certain aspects of film policy in specific countries. Par Frédéric Martel (2019) looks at European cultural policy and argues that, as digital transition has transformed culture in the contemporary era, cultural policy also is beyond arts policy. In particular, the economy of culture and the cultural industries must lie at the heart of the cultural policies. Furthermore, Victoria Durrer et al. (2017) examine the various dimensions of cultural policy in global terms and recognise that the studies of cultural policies are across a range of academic disciplines.

In the UK, the recognition of cultural film policy can be divided into three stages. First, in the 1920s, the cultural characteristics of film were discussed in terms of education, art and national traits. Low (1949) has noted the prime motivation behind cultural film production:

A change took place after 1929. In November of this year a Commission on Educational and Cultural Films was set up by a Conference of educational and scientific organisations, largely on the initiative of the British Institute of Adult Education and the Association of Scientific Workers. (p. 55).

The Commission was an unofficial body and ‘was set up in 1929 as a result of a conference representing some hundred educational and scientific

organisations' ([Nature, 1932](#)). According to *Nature* ([1932](#)),

The Commission's field of study included methods of improving films and extending their use for educational and cultural purposes, raising the standard of public appreciation of films, and establishing a permanent central organisation for such purposes. . . Its final recommendation is that a National Film Institute be set up in Great Britain, financed in part by public funds and incorporated under Royal Charter. ([p. 199](#))

The subsequent establishment of the British Film Institute (BFI) in 1933 shared the same purposes: the goal was to “provide a source of information on filmmaking and the cinema, to begin a national repository of films, and to undertake the certification of films as cultural or educational on behalf of the government. It would also be a research body, acting as a mediator between teachers and the film industry.” ([BFI, 2014](#)). In this sense, the cultural measures were designed to ensure film was an educational tool and to encourage the production of non-commercial films at this early stage. At this stage, cultural policy was designed for cultural activities, encouraging activities involved with the arts and creative sectors, including filmmaking.

Another significant milestone in the development of cultural policy occurred in the 1980s. While the Films Act 1985 reduced certain economic support through the abolition of the Eady Levy and Quota, some cultural measures were retained, though not at the level of central government. The cultural industries were being increasingly valued in this period, and [Higson \(2020\)](#) notes,

There were two parallel developments in the 1980s and 1990s. On the one hand, Margaret Thatcher's right-wing Conservative Governments rolled out a neo-liberal economic policy... On the other hand, at the local level in London and in other UK post-industrial, Labour-controlled cities, various innovative left-wing cultural initiatives were being developed around the potential for cultural practice to encourage diversity and contribute to urban regeneration.

In this context, some independent and regional cultural initiatives flourished because local authorities sought to encourage cultural regeneration and

stimulate the local economy. Meanwhile, central government strategies towards the cultural industries were missing, as the research paper points out: “whilst the state may manage “high” art it more or less casts “low” art to the market. Thus the commercial cultural industries sector is ignored by cultural policy makers and is given short shift by industrial policy makers; as such it is left to its own devices.” (Pratt, 1997, p. 9). As Pratt argues, film was not in this context highlighted as an art form or an educational tool. Instead, it was part of local government’s plans for urban regeneration, and in doing so, the aim of policymaking was to expand employment and support for local cultural activities under a national neo-liberal economic policy. Therefore, the cultural policy developed in this period resulted in impacts not only on film culture, but also on society at large.

The third stage is the development of the creative industries from the late 1990s, when the incoming New Labour government redefined the concept of the cultural industry as the creative industries. The term ‘creative industries’ aimed to combine economics with culture and arts; by encouraging artists’ creativity and promoting innovative new ideas, the creative industries concept and subsequent policy was intended to power the creation of jobs and to drive national and local economic growth. Clearly, creative industries policy has not only focused on cultural aspects, rather, it has great economic and social concerns as well. While I shall further discuss the transition from the cultural industry to creative industries in Chapter 3, the design of creative industries redefined cultural policy, as it blurred distinctions between cultural, social and economic policy.

I will have a further discussion about the blurred boundaries between various policies in a latter section, but for now, by examining three stages of cultural policy development, I have tried to demonstrate that film cultural policy initially refers to policies that regulate cultural aspects of the industry and promote the UK film culture. However, it is essential to note that cultural activity cannot be considered in a vacuum, and cultural activity clearly encompasses social behaviours and is dynamic, due to developments in society. As Hill (2004) argues that “cultural policy has itself been shaped by sociological as much as aesthetic concerns.” (p. 33). Thus, to analyse film cultural policies, it is important to examine the social environment, and it is necessary to bear in mind that social actions and film social policies strongly affect each other. In fact, social policy and cultural policy both reflect the cultural demands of

the society at the time, while they also represent the cultural developments of the film industry in the ensuing years.

To address the earlier issue raised in this section, I shall explain why I choose to use the term ‘socio-cultural policy’. In the historical context, film censorship and classification have often been regarded as forms of social policy, as the regulations and classifications are expected to shape how films influence the society and the public. At the same time, however, film censorship and classification have also affected film culture, because the regulations have restricted certain content on screen, indicating that they encouraged certain types of film-making. As a result, both the restrictions and the promotion of specific types of filmmaking have inevitably influenced filmmakers and the film culture they have shaped. Thus, the concept of social policy may not accurately describe the cultural aspects of film censorship and classification. Furthermore, in the contemporary era, cultural policy for the cultural industries and creative industries do not only have effects on arts and cultural activities, but also enable economic growth and increase employment.

Thus, to some extent, it is difficult to draw a distinction between these two aspects, since both the terms film social policy and film cultural policy emphasise social and cultural characteristics respectively. Social policy in the film industry is strongly connected to the regulation of film content through censorship, film classification, and measures relating to diversity, and inclusion, while cultural policy intends to promote a version of national cinema, film education and media literacy. Both will vary due to constant technological, social, and political change. Indeed, social policy and cultural policy have been intertwined in film history and have, together, shaped contemporary film policies, and neither of them on their own is sufficient in defining film policies.

As a result, I use the combined term socio-cultural policy in this thesis, to identify film policies which have resulted in both social and cultural impacts on the film industry, as well as on the wider social and cultural aspects of the UK.

2.4 Economic policy

In addition to socio-cultural policy, economic policy has played an equally significant role in government policymaking – and arguably, a more significant

role. It is widely recognised that “film is an economic commodity as well as a cultural goods.” (Moran, 1996, p. 1), and economic policy therefore has a great, if not the greatest, impact on the film industry and the development of film policy.

Compared to socio-cultural policy, economic policy is apparently easier to understand, and refers to “the set of controls used by the government to regulate economic activity.” (Oxford Reference, 2022). In this context, although economic policy has been widely discussed by scholars, the term ‘economic policy’ has not always been used in film studies. For instance, Dickinson and Street did not name the film legislation they discussed as economic policy, they stated that “the area of policy explored in the book relates to the economic management and control of the film business.” (Dickinson & Street, 1985a, p. 1). They also acknowledged that most of the film legislation they discussed was “within the framework of commercial policy.” (Dickinson & Street, 1985a, p. 2). Even if they do not use the term economic policy, it is certainly reasonable to suggest that they are in fact discussing economic policy. On the one hand, “economic arguments were not persuasive since the sector to benefit, film production, played a minor role in the national economy and employed only a few thousand people based in the relatively prosperous South-East.” (Dickinson & Street, 1985a, p. 2). On the other hand, even though the cultural concept of ‘Britishness’ was central to the arguments that led to the establishment of the 1927 Quota Act, the act itself focused on economic factors, as “the criteria chosen for determining whether a film was “British” had relatively little to do with cultural characteristics, [and] the main factor was the proportion of labour costs paid to British nationals.” (Dickinson & Street, 1985a, p. 2). Likewise, the main purpose of the act was to protect the market for British films, an essentially economic goal. Thus, the film policy enshrined in legislation such as the 1927 Quota Act was not identified as economic policy at the time it was developed, but the policy certainly fits the definition of economic policy, because the purpose of the policy was in fact primarily economic.

More recently, Hill also focuses on the topic of UK government film policy, pointing out that “government film policy has been preeminently an industrial policy concerned with the preservation and support of commercial film making.” (Hill, 2004, p. 30). In this context, the Quota legislation, the establishment of the National Film Finance Corporation and the British Film Fund

Agency, and incentives such as tax relief have been “primarily industrial in character and driven by a desire to support the commercial production sector of the local film industry.” (Hill, 2004, p. 32). Note that Hill here uses the concept of industrial rather than economic policy. However, a few years later, Hill does firstly uses the term ‘economic policy’ and he notes that “historically, government film policy has primarily been conceived as an economic policy concerned with the maintenance and support of commercial film production within the UK.” (Hill, 2012, p. 337). There is no evidence that Hill changed his terminology on purpose to indicate different meanings; thus, as I understand it, industrial policy and economic policy share the same definitions, and the terms as he uses them are synonymous.

In this thesis, I will use the term economic policy to describe government film policies that are intended to stimulate economic contributions and to promote British film activity as a business. Film economic policy thus involves supporting domestic production and the distribution and exhibition sectors, attracting inward investment, enabling film co-productions, and so on.

I will also explore the the development of economic policy in UK film history in Chapter 3, using Hill’s (2016) historical periodisation of ‘protectionist’, ‘interventionist’ and ‘market-friendly’ film policies. By discussing these terms, I aim to gain a better understanding of film economic policy in a historical context, and to demonstrate that protectionist, interventionist and market-friendly strategies are three essential economic policy strategies that have applied to distinct phases of historical British film policy. I also argue that on occasion the three strategies can all be seen in play at the same time. For instance, the ‘protectionism’ identified by Hill in the 1920s and 1930s relates to the fact that that the government erected trade barriers in the form of quotas, designed to limit the number of foreign films in the domestic market and create more space for domestic productions. This scheme therefore also created a ‘friendly’ market for domestic productions, so one could argue that the quota act was an example of both protectionist and market-friendly policy. In addition, what Hill calls ‘interventionism’ represents the government’s interventions in the market by subsidising domestic productions; as a result, it too attempted to be ‘market-friendly’ to the producers of British films. Being ‘market-friendly’ could also imply friendliness to a more diverse film culture, meaning that film policymaking therefore could be both a socio-cultural and economic in its intentions, as it may have economic purpose and

socio-cultural impacts, and vice versa. Although economic policy often appears to have strong economic purpose and is easy to distinguish, it is worth noting that in the contemporary era, economic film policy does not only obtain economic goals, because it may at the same time be expected to achieve socio-cultural contributions. In the 2010s, for instance, *BFI 2022* strategy has highlighted diversity in cultural programmes, and argued that it is “good for creativity, supports economic growth, taps into under-served audiences and makes good business sense.” (BFI, 2017d).

In this context, policymakers have discovered the economic drive in both commercial filmmaking and cultural engagement. As such, a socio-cultural programme is expected to represent society and to stimulate economic development, while economic film policies could simultaneously aim to achieve socio-cultural goals. This blurring of the boundaries between different forms of film policy has attracted the attention of other scholars and will be further explained in the next section.

2.5 The blurring of distinctions between contemporary film policies

To achieve a better understanding of the film policies that I shall discuss in the following chapters, in this section I intend to further clarify a few definitions, and to argue that the boundaries between economic policies and socio-cultural policies have increasingly blurred in the contemporary context. That is to say that some policies are much less clear-cut than is commonly claimed, and apparently distinctive policies may have overlapping purposes or impacts. On the other hand, some policies deliberately integrate and combine various purposes or impacts that cross boundaries. As discussed in previous sections, there is no denying that the blurring of boundaries between various policies is a phenomenon that has occurred increasingly in the last two decades and that it has received increasing attention from scholars and the industry. This is partly because of the emergence of the concepts of cultural and creative industries and the strategies behind them. There has also been a blurring between regional, national, and international film policy.

The blurring between economic and socio-cultural policies can be observed in the tax relief policy that was designed to attract inward investment and encourage international co-productions, and the Cultural Test that was in-

roduced to make tax relief operable. John Hill (2016) has argued that “the Cultural Test may be seen to have rested upon a degree of blurring of the apparent boundaries between the ‘economic’ and the ‘cultural’ as well as the ‘national’ and the ‘transnational’.” (p. 719). While tax relief policy appears to be economically focused, the Cultural Test policy and this tax relief policy have been inseparable because a film must pass the cultural test to be eligible for tax relief. This link has ensured that investment can support UK film productions to a great extent, while the Cultural Test serves as a prerequisite to qualify inward investment films as domestic ones, ensuring that the inward investment projects can receive the same tax relief benefits as the domestic productions do. In this respect, “the tax-relief system and the Cultural Test were intended both to incentives inward investment and to encourage and support indigenous production, and the government was at pains to reassure stakeholders that the new system would benefit the industry as a whole.” (Higson, 2011, p. 64). Therefore, the Cultural Test and the tax relief policy, which represent film-related socio-cultural policy and economic policy in the contemporary era, share the same purpose and cross the boundaries of these two policy domains.

It is also worth noting that the blurring of boundaries between economic and socio-cultural policies appear to be occurring at the regional level. Regional film policies, such as the Regional Screen Agencies that have emerged since the 2000s, have gained an increasing number of characteristics. These policies have explicit economic goals that aim to attract international inward investment and use national funding to support the local film industries, including the production, distribution, and exhibition sectors. However, they also have significant socio-cultural characteristics, as they have aimed to solve employment problems to some extent and promoted regional and national diversity, both on and off screen. These regional film policies have, therefore, combined the value of both economic and socio-cultural policies and simultaneously blurred the boundaries between these policies.

Film policymaking at the regional, national, and international levels also shows blurred distinctions. For instance, many regional film policies established since the 2000s have an integrated strategy that aims to promote the UK’s creative industries as a whole. In this respect, regional policy not only has an economic and socio-cultural purpose but also plays an essential role in contemporary national and international policy. As Hill note (2012),

In the case of the UK film industry, the new emphasis upon "economic impact" also shifted the terms of the debate away from the profitability, or otherwise, of individual films (as occurred in relation to the use of Lottery monies) towards the economic benefits of film production in a country or region more generally. (p. 344).

National film funding, such as from lottery revenue, has increasingly valued regional and national film productions to achieve greater socio-cultural impacts. Therefore, the goals of regional film policy have inevitably affected the practice of national policymaking.

Apart from public funding, national and regional policymakers also intend to attract inward investment to support local film activities. In the last decade, international inward investment brought large projects to various regions in the UK. As *ScreenDaily* (2018a) reported,

Drawn in large part by the UK's tax reliefs for film and high-end TV, inward investment revenue from international productions reached more than \$3bn in 2017. London may be the gateway for these productions, but much of the money is being spent many hundreds of miles from the capital.

In this respect, the policy to attract international inward investment and the policy to support regional film productions have interacted well. In effect, the tax relief policy has made a great contribution to regional development from the economic and socio-cultural perspectives. The latest BFI (2021b) statistics for 2020 revealed that:

Despite disrupted production schedules over 5 to 6 months, production spend for the whole of 2022 is just 21% down on 2019's record levels. Inward investment and co-production films and HETV shows have delivered 76% of the production spend underlining the UK's global reputation as the world-leading centre for film and TV production...film and high-end television production generates local business activity and jobs across the UK. (BFI, 2021b).

In addition, Creative Europe, a European Union programme dedicated to the cultural and creative sectors since 2014, has provided subsidies to the UK's regional film activities. The subsidies could be regarded as a supplement to inward investment and might have benefited independent film productions at

the regional level. Therefore, by having various film hubs to attract inward investment in a global market and to support local film activities, regional film policy demonstrates the blurring distinctions between regional, national, and international strategies in the context of globalisation.

This discussion of blurring between economic and socio-cultural policy, as well as the boundary-crossing between regional, national, and international policies. This section's aim was to demonstrate the complexity of film policymaking, especially in the contemporary era. Furthermore, this recent interplay between policy domains also indicates that film policymaking has been dynamic and has continually faced changes in both its function and its organisations. It is also necessary to acknowledge the way film policies have been made and used and to question whether they may be able to face new challenges.

In the following chapters, I will examine how the blurred boundaries between policies developed. In doing so, I will discuss the various dimensions of the BFI's contemporary policymaking and examine whether these policies can meet the challenges of this decade.

2.6 Conclusion

This chapter examined different dimensions of UK film policymaking and defined the key terms that will be used in this thesis. Film has been regarded in the UK variously as a commercial product, a means of generating economic growth, an educational tool, an art form, and a cultural representation of a nation and its history. Along with the dynamic development of the film industry and society, the role of film has also been shaped by policy. UK film policymaking has generally been designed in tandem with the government's political agendas at different periods, with the aim being to support the UK film industry and to promote film culture. However, different governments have held different opinions about official interventions in the film industry, which has resulted in various discontinuous policies that have been applied to the industry over the past century.

In the contemporary era, the economic and socio-cultural contributions of the UK film industry have been increasingly valued as part of the creative industries. Meanwhile, film policymaking has also been complicated by several factors, including the effects of globalisation, moral developments in UK

society, and the changing landscape of domestic politics and international relations. Therefore, present-day film policymaking is expected to encompass multiple functions and to achieve various contributions. Given these circumstances, I argue that there is a certain blurring between economic and socio-cultural policy, as well as between regional, national, and transnational policy.

In addition to the development of an increasingly globalised film business, film policymaking has also become ‘soft’, as it has shifted from forming regulations for the domestic film industry to shaping the industry to attract international capital by branding British national cinema. In doing so, the socio-cultural aspects of economic policymaking appear to be the soft power of the British film industry. Not only do socio-cultural activities contribute to improving the UK’s economy and enriching people’s lives, but economic policymaking with socio-cultural discourse also empowers the industry to present the benefits of making films in the UK at an international level.

However, film policymaking is currently facing multiple problems. Historically, the UK film industry has been in the shadow of Hollywood’s economic and cultural dominance, which raises questions about the status of British cinema. Furthermore, although the tax relief policy has promoted the UK as an international production hub, the domestic independent sector may face unprecedented challenges, I will further examine the impacts of the pandemic in Chapter 6.

While I have analysed the phenomena of film policymaking in the contemporary era in this chapter, it is also important to further explore the development of film economic policy and socio-cultural policy in a historical context, which I do in the next chapter. In subsequent chapters, I will continue to explore how contemporary film policy has been shaped by the historical development of policymaking while focusing on the contemporary situation.

Chapter 3

The historical development of UK film policy, from 1909 to 2010

This chapter focuses on the development of UK film policies and legislation in a historical context. In particular I examine a few milestones in policymaking that played crucial roles and had significant impacts on the subsequent development of film policy, including in the contemporary period.

First, I analyse the Cinematograph Act 1909, the original piece of UK film legislation, which was the government's first attempt to regulate the film industry with legislation, one which also had unexpected socio-cultural and economic results, leading to the establishment of the British Board of Film Censorship (BBFC) in the 1920s.

From a socio-cultural perspective, the BBFC has been a moral gatekeeper for the industry, and its dynamic development also has affected the UK film culture on screen. This impact, as well as the history of cinema-going and changes in the audience experience also play a part in the development of film as medium, as well as a business.

Subsequently, from an economic perspective, I use John Hill(2016)'s historical periodisation and his terms 'protectionist', 'interventionist', and 'market-friendly', to analyse the development of British economic film policies. In doing so, I examine the nature of government interventions at different stages in UK film history and their various results.

The government's international co-production policy is another notable

example of interventionist measures. As an approach to increase the UK film international distribution from the early stage, the UK's historical co-production practice with different countries or territories indicated different types of co-productions.

Furthermore, how the film industry was perceived in policymaking historically shifted according to differences in government strategy and ideology. Bearing this in mind, I shall look at the development from the idea of the culture industry, to cultural industry and finally to creative industries, discussing why the terms changed and what they have represented.

In the final section of this chapter, I look at the establishment of the UK Film Council (UKFC) and examine the significant and innovative policies developed in the UKFC era (the 2000s), as these policies have directly affected contemporary film policymaking in the BFI era (from 2010 to the present).

3.1 The first UK film legislation: socio-cultural value and economic value

Questions might be asked about why I start the chapter by discussing the 1909 Cinematograph Act, legislation that was written over a hundred years ago. Indeed, as Paul Dave (2016) notes, “it is common for histories of British film policy to start in the 1920s with its key pieces of protectionist legislation affecting the economics of the industry in the face of Hollywood dominance, thus neglecting earlier legislation such as the Cinematograph Act of 1909.” (p. 186). Despite the circumstance, the Cinematograph Act 1909 not only had impact on the subsequent development of film policy, but it also reflected the character of UK film policy, as this early piece of film legislation could be reasonably defined as enshrining both economic and socio-cultural film policy.

As I have argued in Chapter 2, the boundaries between economic policies and socio-cultural policies have become increasingly blurred in contemporary policymaking, and scholars often regard this phenomenon as emerging along with the introduction of creative industries policy and the creation of the Cultural Test. It is interesting to note that, while the UK's first film-related legislation was designed with strong socio-cultural intentions behind, it unexpectedly led to both economic and socio-cultural results, and can be regarded as establishing both the economic and socio-cultural value of cinema in policy debates. Given this development, I intend to provide a distinctive angle to the examination of the history of UK film policies, noting that policymaking is

always complex and government interventions could have multiple results, intentionally or unintentionally. Furthermore, when I discuss the concept of the creative industries and the UK Film Council's strategies later in this chapter, I shall return to the first Act and compare the contemporary policymaking with what happened around the 1909 act. In doing so, I will be able to analyse the development of policymaking in the last century.

This section of the chapter provides an overview of the first UK film legislation. First, I explore the historical background of the first film act and the UK film business at this early stage. Second, in focusing on the intentions and legal results of the Cinematograph Act 1909, I look at the relationship between the film industry and the government in the 1900s, examining both primary sources, such as archives and trade papers, and secondary sources. In the final part of the section, I note the unforeseen social and economic impacts of the Act, and how it changed the film industry in the next few years and impacted the film policymaking subsequently.

3.1.1 A new era for the UK film industry: The birth of the first film legislation

As discussed in Chapter 1, film has both economic and socio-cultural values, and there is evidence that from the earliest stage of their development, films were being discussed in terms of their economic, social, and artistic characteristics. Indeed, film has been considered as an important source of entertainment and a powerful medium since the invention of motion pictures.

Rachael Low pioneered recognising the economic value of film as an art form, noting,

As far as their market value was concerned films had moved from the position of merchandise to that of works of art, and if this gave many of them an economic value out of all proportion to their intrinsic value it was but following the practice of other arts. (R. Low, 2005, p. 49).

However, when compared to the well-recognised economic value of the early film industry, the question of social value appeared to be controversial. On the one hand, some professionals in the film industry saw the positive effects of films being used as educational tools. For example, Charles Urban, an American producer who expanded the London-based Warwick Trading Company

to produce British documentaries and news, expressed his ambition to *The Optical Lantern and Cinematograph Journal* in 1904,

There is undoubtedly a greater interest in projected pictures today than ever... We have decided to refuse to pander to ... low tastes, and to so raise the standard of our films that they stand head and shoulders about all other competitors. We recognise the value of the living picture as an educator. (Urban, 1905).

On the other hand, while the exhibition of films provided a social space for the public, it resulted in potential risks to public security. In particular, “the social centre for the lower classes began to move from the pub to the picture theatre, and the weekly flick replaced, or at least offered an alternative to, the blind drunk. This was a social achievement of which the film trade was intensely and vociferously conscious”. (R. Low, 2005, p. 32). Thus, Low declared, “as film exhibition grew in importance both in the economic sphere and in the mental environment of the country, it received its first share of official interference at a time when the whole industry was still largely unorganised and pliable”. (R. Low, 2005, p. 33).

In this social-historical context, on 1st January 1910, the Cinematograph Act 1909 officially came into effect, as the first film legislation in the UK. The Act initially had simple intentions; however, it became one of the most significant measures in UK film policy history due to the unexpected economic and socio-cultural impacts it had on the film industry.

Notably, there have only been a few studies focused on the Cinematograph Act 1909 as, to some extent, it has been considered less than debatable. Rachael Low was the first academic to introduce the Cinematograph Act 1909 into UK film studies. Subsequently, David Williams focused on early film legislations, in his article *The “Cinematograph Act” of 1909: An Introduction to the Impetus behind the Legislation and Some Early Effects*. He notes that “while the intention of the Act could be seen as national tidying up of existing professional practices, local by-laws and local regulations for the safety of the public, its unintentional result was the controlling powers it gave to the local authorities to determine programming as well”. (D. R. Williams, 1997, p. 341). Jon Burrows and Richard Brown (2010) also note another unexpected outcome as the the first major cinema boom period of 1909 to 1914. Furthermore, Luke McKernan (2007) examines the rapid growth of cinemas in London between

1906 and 1914, resulted from the 1909 Act, and the socio-cultural impact the early cinemas had on audiences.

In this context, although the Cinematograph Act 1909 (1909) stated that its aim was to “make better provision for securing safety at Cinematograph and other Exhibitions”, previous studies have successfully established that the Act was not as simple as the government presented it, rather, it had implications much wider than mere questions of safety. By examining the background to the Cinematograph Act 1909 and examining the effects of the legislation, I will attempt to demonstrate why the Act produced certain unexpected impacts, and why these impacts can be understood from both economic and socio-cultural perspectives.

This first government intervention in the film industry as primarily intended to solve emerging social threats such as fire disaster caused by celluloid film burning at film exhibitions. There were actually several related problems that the legislation was designed to address. First, the locations of film exhibition were not designed to screen films, and hardly had any safety measures in place. As one writer of *Birmingham Daily Post* (1968) recalled, “Music halls were being built as early as 1901 with specially built ” bioscope” or ” biograph ” chambers or failing this an iron-sheeted booth was used all this before the 1909 Cinematograph Act.” Second, the celluloid film used at the time was highly flammable when exposed to heat; David Williams (1997) states that “if cinematograph film jammed in in the projection gate and was not swiftly released, combustion from the heat of the lantern house could take place in four or five seconds”. (p. 341).

The dark narrow spaces of early film viewing venues and the inflammable film used could easily cause fire disasters. Williams (1997) further notes that “the New Town Hall cinematograph fire in September 1907 was widely reported across the whole of Britain and was sufficient to revive press and public fears about the safety of film shows”. (p. 342). Not only did this fire lead to public fears, but it also alarmed the government and that ministers considered film to be dangerous can be seen from the discussion surrounding the Cinematograph Bill in the House of Commons. Mr. Gladstone pointed out that,

It must not be forgotten that crowded audiences go to see these exhibitions, the number of which are increasing. I have had the strongest representations made to me by local authorities—borough

and other councils—which show plainly that there are crowded attendances at these exhibitions in unlicensed and unsuitable premises; and quite recently there have been very bad accidents through films flaring and consequent panic, which in some cases has entailed loss of life. (Hansard, 1909).

To prevent serious fires from occurring in exhibitions, Mr. Gladstone insisted that “there will have to be regulations, but they will be very simple, and the whole object of them will be to stop danger where it exists”. (Hansard, 1909).

A few months after these discussions in the House of Commons, the 1909 Cinematograph Act was passed on 25th November 1909. The Act stated its “provision against cinematograph exhibition except in licensed premise.” (Parliament, 1909), and declared that “a county council may grant licenses to such persons as they think fit to use the premises specified in the license for the purposes aforesaid on such terms and conditions”. (Parliament, 1909). The legislation thus offered powers to county councils to grant licenses to film exhibitors and also allowed them to charge penalties if exhibitors contravened the legislation. Meanwhile, a constable or any officer appointed for enforcement purposes by a county council could at all reasonable times enter any premises, whether licensed or not. In this context, the legislation granted city councils unlimited powers and focused on regulating film exhibitions.

The measure inevitably made county councils, the law-executors, the beneficiaries of the bill. While the Act aimed to prevent fire at film exhibitions and contributed towards social stability, the county councils were empowered to be in charge of license fees and penalties. It is interesting to note *The Bioscope* (1909) reported a County Council’s meeting after the Act came into force,

At the meeting of the West Sussex County Council on Friday last, the Chairman called attention to the Cinematograph Act... it was most necessary that some control should be exercised over the places [the film shows] were held in, the persons who provided them, and the material used at them. He therefore moved that the Finance Committee be empowered to take all the steps they thought expedient to bring the Act into operation, and that they report to the Council on the manner in which the Act should be administered.

Under the circumstance, the Finance Committee was appointed to the operation, indicating the expected increased financial income due to the charging of a film license fee. Therefore, the county councils not only gained the power to restrict film exhibitions, but they were also able to boost the local government's financial income.

In this respect, the 1909 Cinematograph Act was the first film legislation which specifically regulated film exhibitions, and the socio-cultural intentions behind the Act were strong. While the Act indeed prevented fire in early film viewing venues, the results were beyond expectations; the Act not only empowered county councils, but also eliminated many old and unsuitable film viewing places and boosted cinema businesses in the UK. I shall further discuss the economic and socio-cultural impacts of the 1909 Cinematograph Act in the following sections.

3.1.2 The economic impacts of the 1909 Cinematograph Act

As previously mentioned, when films were first invented there were few places that were designed to facilitate this new medium, and films had to be exhibited in theatres and music halls, at fairgrounds, and in converted shops. As a result of the 1909 Cinematograph Act, film exhibitors were urged to exhibit only in venues now licensed for that purpose. Under the circumstance, purpose-built cinemas emerged around 1909; some of them were adapted from music halls and some were newly built purely for film exhibitions.

According to the available statistics, by 1909, the number of film venues in London was 195, and by the end of 1910, the year in which the Cinematograph Act was first instituted, the number increased to 375. (McKernan, 2007, p. 131). The proliferation of cinemas indicated two factors: first, the 1909 Cinematograph Act urged film exhibitors to use eligible film venues to gain a license for their exhibitions; second, film exhibitions had proved profitable, which encouraged increased investment in cinema businesses.

Furthermore, the Act not only led to the cinema boom, but also attracted a wide range of private investment into film exhibition and suitable properties. As Luke McKernan (2007) noted,

Particularly around 1909 to 1910, a remarkable transformation occurred across the face of London. These were the years in which cinema came to the city. Cinemas appeared with startling suddenness, and in profusion. They effected a highly visible change along

many of the capital's prominent thoroughfares, and drew in a vast new, largely working class, audience. (p. 125).

Cinema soon became a popular form of private investment and advertisements began to appear in newspapers asking for business partnerships. For example, an advertisement in the *Nottingham Evening Post* (1916) in 1916 claimed, “partnership wanted, cinema near Nottingham, investment £150, can draw 50s weekly and profitable”. Noting such ventures, Jon Burrows and Richard Brown have highlighted the commercial viability of joint stock film exhibition companies. In their analysis, Burrows and Brown argue that cinema was not a bubble market, as some had painted it to be. Most importantly, they emphasise the contribution of the 1909 Cinematograph Act on film exhibition businesses, highlighting that

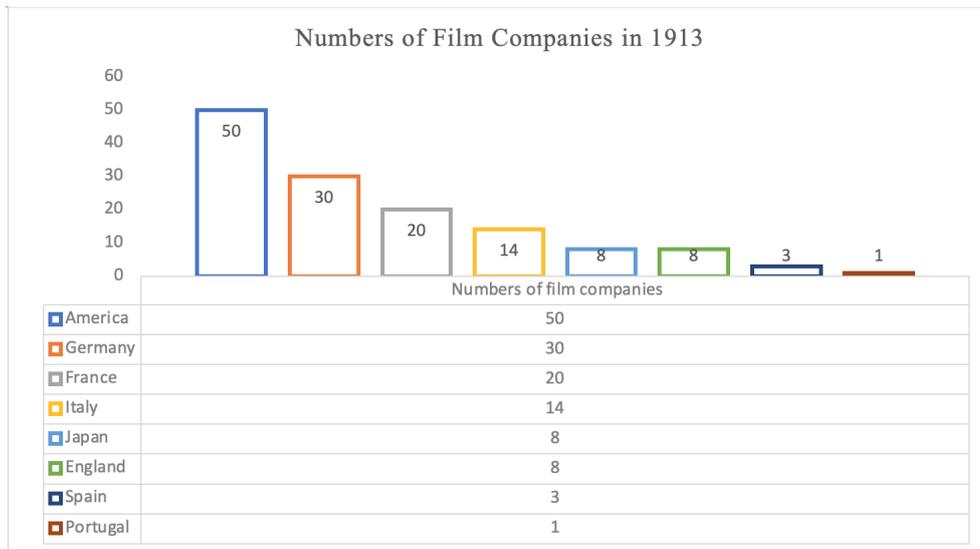
[The 1909 Cinematograph Act] had a consequential effect of directing invested capital into tangible fixed assets... [whereby] the Cinematograph Act also functioned as a ‘Building Act,’ as one of the more straightforward ways of ensuring compliance with its criteria was to erect purpose-built structures.

In this context, the 1909 Cinematograph Act mainly encouraged investment in film exhibition spaces and, in particular, cinemas as assets.

Despite the cinema boom, there is evidence to show that UK film industry was hardly competitive with the US and other European countries, indicating that the boom in the cinema business failed to benefit the other sectors. According to *Pall Mall Gazette*'s data (See Figure 3.1, the number of film companies in England was relatively small, while America had 50 film companies, the UK only had 8. The press (1913) argued that,

Those approximate figures of the total of film companies show how badly England has been beaten by other countries in cinematograph enterprise. Yet this country only a few years ago was the pioneer of the living picture world. The Continent has more faith in the cinema.

On the one hand, this was because “English people fight shy of investing money in living pictures”, as Will Barker (1913), the managing director of the Barker Motion Photography, Limited put it. On the other hand, it demonstrated that the Cinematograph Act did not economically support the film



Source: “Cinema Boom Coming”, *Pall Mall Gazette*, 11 June 1913

Figure 3.1: “Cinema Boom Coming”, *Pall Mall Gazette*

production end of the business, as it primarily had socio-cultural intentions and the sites of exhibition. As a result, private investors withdrew from the film production business due to the lack of capital. For instance, Robert Paul, a British pioneer filmmaker, decided to exit the business because the business had “become too speculative... the competition was becoming fierce, with attractive films flooding in from France, Italy, Denmark and the United States. Considerable investment and expansion at his Muswell Hill Studio would have been needed to stay in business.” (Christie, 2017).

Therefore, the consequences of the Cinematograph Act 1909 had a positive impacts on the exhibition sector, as it unexpectedly contributed to the establishment of cinemas in the UK and led to a cinema boom, the increased numbers of cinemas provided opportunities for international films to attract more UK audiences and could benefit cinema owners. However, it did not make the UK production film industry more competitive on a global stage, and the production sector faced a critical situation in the subsequent 1910s.

3.1.3 The socio-cultural impacts of the 1909 Cinematograph Act

As previously discussed, the 1909 Cinematograph Act was designed to regulate the public screening of films to prevent fires at film exhibitions. However, whether the Act was effective in ensuring public safety remains debatable.

Although it is difficult to find documentary records of cinema fires in the early 20th century, newspaper reports provide some evidence. According to the *British Newspaper Archive*, reports of ‘cinema fires’ in England actually increased after 1910, and only decreased to 1910 levels in the period from 1940 to 1949. The decrease of reported cinema fires in the 1940s could be the consequence of the widespread use of ‘safety film’. As the Kodak Company noted, inflammable cellulose nitrate film was officially discontinued in the 1950s. (Kodak, 2017).

This suggests that the 1909 Cinematograph Act did not effectively meet its primary socio-cultural goal of reducing fires by increasing safety measures. However, the Act did have several other significant socio-cultural impacts that affected the film industry in the long term.

Early film venues played an essential socio-cultural role as they provided a social space for metropolitan workers who had gained more leisure time and spending power due to industrialisation. However, those venues were also vulgar and chaotic and had heterogeneous audiences, who exhibited various behaviours that were perceived by some as immoral or antisocial at the time. Lise Shapiro Sanders, for instance, has discussed the film genre of courtship:

Some of the films in this genre showed a kiss repeated several times, layering successive versions of this formerly private activity as a public spectacle. In doing so, these films suggested the presence of private sexual acts taking place alongside the exhibition of the image in the public environment of the early cinema auditorium. (Sanders, 2002, p. 102).

This situation changed after the 1909 Cinematograph Act came into operation, when middle-class audiences came into the film industry’s sights, *The Bioscope* (1913) argued that “the ordinary audience is made up of middle-class folk, and it is, therefore, with the joys and sorrows of other middle-class folk that the most successful picture plays must deal”.

The modern cinemas that we are familiar with today emerged as the middle

class audience became the target audience for the newly built cinemas. First, the new cinemas developed after the 1909 Act focused on quality and safety, as this 1913 report *The Bioscope* (1913b) suggests,

On June 21st next the people of Pembroke will enter into possession of the handsome and commodious new Cinema Theatre. The flooring is of ‘doloment’. It is hygienic, absolutely clean, warm, and practically silent. At the back of the hall will be a specially upholstered lounge, which will give a very cosy appearance to that part of the hall. The screen will be 23 ft. wide by 18 ft. deep. The lighting, both inside and outside, will be of an almost ideal character, and generated by a 12 h.p.

This report demonstrated that the ‘new Cinema Theatre’ provided the audiences with a safer and more luxury space for cinema-going.

Second, longer feature films, which emerged in the early 1910s, became increasingly popular within a short time. Gerben Bakker (2005) noted that “feature films were a new product, which became the “standard”, the main product of the film market between 1915 and 1917.” (p. 11). Unlike the one-reel films, feature films could use five reels or more; and, to be profitable, they needed dedicated promotional campaigns and longer runs at higher ticket prices. Clearly, compared to the continuous shows, the feature films had higher prices and each film ran for a longer time. It was only the middle class who could afford the time and money to spend on such films. Along with the changing type of film played in the cinema, the manners of the middle-class audience in the cinema also became the ‘standard’. Not only did the changes to cinemas under the Act attract middle-class audiences, but middle-class audiences also shaped modern cinemas in terms of acceptable behaviour.

Finally, the supervision of cinema audiences became increasingly comprehensive. As Lise Shapiro Sanders points out, “the constitution and behaviour of film audiences altered dramatically between the 1890s and the 1910s; in particular, audiences became less participatory and more subject to social control and regulation.” On the one hand, cinema managers played the role of enabling audiences to cope with small amounts of danger; on the other hand, audience misbehaviour in cinemas could lead to charges against exhibitors by local authorities. There is no denying that the Cinematograph Act 1909 played an essential role in such improvements, as the upgrading of film venues and the changing cinema audience effectively changed audiences behaviours.

Meanwhile, the pressure on exhibitors to keep the audiences safe from danger and misbehaviour also contributed to a changing atmosphere in cinemas.

In prompting these changes, while the Cinematograph Act 1909 was not effective at preventing fires in cinemas, it did successfully altered cinemas' socio-cultural function. Film venues were no longer solely a social place for the urban working class to entertain themselves. Rather, they became a distinctive space for cultural events and regular social activities attracting middle-class audiences from the 1910s. Thus, the establishment of modern cinemas has shaped the audience's habits of cinema-going that affect people today.

Despite these socio-cultural contributions, the supervision of cinemas and the content and morality of the films they screened caused concerns for film exhibitors and others connected with the business. As a result, the Act unintentionally led to the establishment of the British Board of Film Censors (BBFC).

While the 1909 Cinematograph Act granted local authorities the power to offer film exhibition licences, local authorities also requested the power to prohibit the showing of films they disliked. Furthermore, the standards were left largely to matters of individual taste, which resulted in a difficult situation for exhibitors, when they could not be certain whether a film would attract complaints. (Lamberti, 2012, p. 6). Film exhibitors were also worried that showing a film in one county might offend local council members, while the same film might be accepted in another county.

To consider these circumstances, the filmmakers' trade body the Kinematograph Manufacturers Association and a few influential film renters met in 1912. They agreed they would approach the Home Office to propose that the industry itself should develop self-regulated censorship. (Lamberti, 2012, p. 6). According to *The Bioscope* (1912), the Home Secretary laid out their proposals regarding the censoring of films as follows:

The proposal which at present seems to be most in favour – or, at any rate, in the most defined shape – is that there should be established by the Trade itself a voluntary censorship of films in contradiction to a censorship by an outside body, whether a Government department or a committee official of the London County Council.

This proposal eventually led to the formation of the BBFC, which was announced in the House of Commons in November 1912. The Board was

defined as a non-governmental organisation founded by the film industry, but an unexpected fruit of the Cinematograph Act 1909 was the essential socio-cultural role the BBFC began to play in the film industry from 1912. *The Bioscope* (1913a) noted that manufacturers and exhibitors soon entered into agreements with the Board, agreeing that films published after March 1, 1913 would be exhibited only if they had been passed for exhibition by the Board. *Nottingham Journal* (1916) also wrote about what it perceived as the BBFC's positive impacts on audiences and the film industry:

There could be no question that the work of the Board had resulted in getting rid of certain objectionable features which were frequently met with in the early part of the year, and the existence of the Board had a salutary effect in gradually raising the standard of subject, and eliminating anything repulsive and objectionable to the good taste and better feelings of English audiences.

In this respect, the establishment of the BBFC was not only played a crucial role for exhibitors, but also affected how films represented UK society and culture, and whether audiences could access to certain content. It is worth noting the initial intention behind establishing the Board of Censorship was not to censor films; on the contrary, the film industry aimed to achieve independence from local authorities in regulating content. The BBFC's censorship of films has had long-term effects on film production and exhibition from a socio-cultural perspective, and I shall further discuss the role of the BBFC in the history of the film industry in the following section.

The discussion of the first film legislation demonstrates that 1909 Act had prolonged economic and socio-cultural impacts on the subsequent development of film policy. The Act's regulation on cinemas contributed to the establishment of modern cinemas and shaped the audience behaviours. Moreover, as the Act had unexpectedly empowered the local authorities to censor films, the industry formed the BBFC to achieve independence from the local government. In these circumstances, the economic and socio-cultural issues became the focus of subsequent UK film legislation and policies in the 20th century.

3.2 The development of socio-cultural policies for cinema

This section discusses the development of film socio-cultural policies in a historical context. I particularly look at the development of the BBFC since 1912, an unintentional policy result of the Cinematograph Act 1909 that had a long-term socio-cultural impact on the UK film industry.

The history of cinema-going is also another key theme that I shall explore. Although the government's regulation and support for the exhibition sector were not as adequate as for the production sector from the 1909 Act, in the wake of the COVID-19 pandemic, debate has raged about how cinemas can survive the latest turbulence and change. While I will examine the exhibition sector and distribution sector in the post-pandemic era in Chapter 7, it is essential to study the factors that have historically affected cinema-going and the changes of viewing experience in different periods. I shall also discuss the implicit relationship between the government policymaking and cinema-going in the historical context.

3.2.1 The BBFC as a moral gatekeeper

Although the BBFC may not play an essential role in contemporary film policymaking, regulations regarding film censorship and classification have been the most crucial socio-cultural policies in UK film history and have significantly shaped UK film culture. The BBFC, as an independent organisation, has been in constant and dynamic power struggles with the industry, the public, and the government. As a moral gatekeeper, the BBFC has sometimes shown strong moral concerns towards film censorship, while sometimes enabling the development of more diverse representations in films. By discussing the historical development of the BBFC, we can see the shifts in the socio-cultural policymaking to the film industry.

The controversial nature of the BBFC was apparent right from the outset and it seemed unlikely that the film industry would support an organisation which could potentially restrict its development. However, in the end, the relationship between the BBFC and the film industry was relatively harmonious in the 1910s and 1920s, and it was also clear that the BBFC stood in line with the film industry, as James Robertson (1985) argues, "The BBFC was financed by the film industry on the basis of a set rate per foot of film viewed...Liaison

with the film industry was maintained through a small committee of producers, exhibitors and distributors which met often until at least the early 1920s to keep the BBFC's work under constant review.” (p. 5).

In this context, the BBFC's primary purpose was to represent the film industry and avoid censorship by local authorities, as the film industry preferred consistent self-censorship to haphazard and uncontrollable censorship by county councils. There is no denying that the BBFC has also made the industry look respectable since it signed up to what was effectively a moral code, and the organisation has also ensured that it - rather than the local or national authorities - determined the code. By issuing the certificates to film exhibitors, the BBFC challenged the power of local authorities, as Annette Kuhn (2016) explains, such condition “transferred a power which belonged in law to the licensing authority – namely the power to censor films – to an organisation with no statutory or constitutional authority (the BBFC was a voluntary body without legal or official status).” (p. 19).

Eventually, the BBFC was formally recognised by the government in the 1920s, and for the most part, the local authorities came to accept the BBFC as the chief body for film censorship. Robertson was impressed by the achievements of the BBFC during the early stages of the British film industry, and stated that its “achievements were considerable when the cinema's development in Britain remained in comparative infancy and patronising antagonism to film as a mass communication medium was still rampant among the traditional governing class.” (Robertson, 1985, p. 41).

There is no denying that the BBFC's existence kept the government interventions an arm's length away from the industry, however, the government also used it as a tool for controlling the film content on screen and the ideology at the early stage. As a moral gatekeeper, the BBFC can ‘open the gate’ by supporting the film industry against the government's interventions, while sometimes, it ‘closes the gate’ by preventing the audience from being exposed to particular content.

For instance, the BBFC's political censorship once eliminated a range of films for the working class, and the BBFC obtained the conservative, middle-class values from the 1920s to 1950s. Unsurprisingly, the BBFC's attitudes were objected to by the working class in the late 1920s. *The Bioscope* (1927) reported the headline “Film Societies to evade censors, new organisations for provinces”, noting that

The Provisional Council of the new organisation, in a statement of its aims, says: “Many of the greatest achievements of the cinema are not available to workers, who are generally forced to see films which are poor in quality, and which bear no relation to their lives and problems. Moreover, the attitude of the Film Censorship is such that the audiences most likely to appreciate Russian films, in particular, are forbidden the opportunity.”

In this period, the BBFC showed a strong moral sense and played a strict role in censoring radical and political issues in films.

As society changed, and new social norms and expectations developed, a series of changes were made by the BBFC from the early 1950s to the 1970s; in particular, the introduction of the “X” certificate was regarded as an attempt to move towards a more modern film classification system. The development of society further affected the tangled relationships between the BBFC, the public, and the film industry. Various certifications were used over time to regulate film exhibition. “U” films were eligible for the widest audience, “A” films required a parent or a bona fide adult guardian to accompany children, and the “H” certificate had been introduced by the BBFC in 1932, designed to cover American horror films. However, the categorisation system did not work effectively, as the “H” certificate was supposed to be advisory but resulted in some ambiguity, while there was evidence that the BBFC applied the “H” certificate not only to horror films, but also to crime films and war films. In these circumstances, the “X” certificate was introduced in 1951 to replace the “H” certificate, to designate films that had passed for exhibition to persons over age sixteen.

The introduction of “X” certificate indicated that the films included mature scenes and could potentially attract the targeted adult audiences, it also relieved some pressure from film exhibitors and allowed film producers to make use of adult-oriented themes. The change demonstrated that the BBFC was able to adapt to the growing permissiveness of society by introducing more specialised certificates. The various certificates contributed to a more diverse film genres from a socio-cultural perspective, enabling adult dramas and horror films to be made available. Not only did the film producers and exhibitors use the certificates as ‘codes’ to reach the targeted audiences, making the profits measurable, but the classifications also encouraged audiences with different tastes to attend dedicated cinemas or screenings.

As UK society grew and rapidly innovated, changes to the BBFC were also inevitable. The 1980s was another significant decade for the BBFC, with the beginning of the home video industry in the UK in the late 1970s, changing the landscape of the film industry and the public's access to films. In this context, the British Board of Film Censors was renamed as the British Board of Film Classification in 1984. This renaming served several purposes: for some commentators, the issue was that videos for consumption in the home needed to be regulated; for others, it was more about establishing a statutory organisation to legally censor the video industry.

The early 1980s saw significant changes in socio-cultural policymaking and the so-called 'video nasties' emerging from the unregulated video industry caused a great deal of consternation in the increasingly conservative social environment. The term 'video nasties', "is a colloquialism originating in the United Kingdom and refers to 72 films that were removed from the shelves of commercial video stores between 1982 and 1984 following criticisms over their violent content which escalated into a "moral panic" over the perceived detrimental effect that these films would have upon society". (McKenna, 2017, p. 11). The BBFC was initially unable to regulate home videos, as there was no legislation governing the home video industry. In these circumstances, Mr Graham Bright, MP, drafted a private member's bill against video nasties. The bill was presented to Parliament in 1983 and successfully passed in 1984 as the Video Recording Act (VRA). The Act offered the BBFC statutory power and contributed to the reformation of the BBFC. According to the VRA, all film in cinemas and videos for home viewing required BBFC classification, the classification also became age specific.

The classification represented an important milestone in film socio-cultural policies, as it officially enabled the production of diverse themes of films for the audiences of different ages. For the BBFC, the statutory power was something of a double-edged sword. Sian Barber (2018) notes that "the outcome of the VRA ensured that the BBFC remained at the forefront of classification and regulation, a remarkable achievement considering expressed Parliamentary concerns about their suitability for this role." (p. 112). However, although the BBFC was now authorised by the government to classify and censor home videos, it would inevitably face more interventions from the government.

Even though the word 'censors' was replaced by 'classification' in the re-named BBFC, the organisation now applied stricter censorship in the 1980s.

This was not only because of the nature of the Thatcher government and its moral and political supporters, but also because the BBFC evinced severe moral concerns about home videos. On the other hand, the VRA and the reformation of the BBFC resulted in debates and criticism from the left-wing media and scholars. Barber (2012) points out “by the end of the 1980s, the BBFC was a very different organisation from the one that had begun the decade, and a large team of examiners worked to apply a wider range of categories”. (p. 123). *The Guardian* (1984) also complained that “[The Video Recording Record Bill] sets up a large bureaucracy to preview, classify, and pre-censor almost every video tape offered to the public”.

By the time the BBFC celebrated its 100 years in 2012, the organisation was in an enviable position; it was trusted by the public and was receiving unprecedented support from the government. As *ScreenDaily* (2018) noted that “the BBFC is arguably in a stronger position than at any time in its history”. The Board had conducted a large-scale public consultation and used the consultation results in evidence-based policymaking, while there has been less focus on critics from either the media or the authorities in recent years. Furthermore, the BBFC has obtained extended responsibility to classify VoD series, games and music videos as well as films and trailers, it faces new challenges to help families and children stay safe online. While the emerging online streaming platforms and VoD may contribute to a wider range of film genres and content on the film market, the big tech companies’ goal is to provide sufficient content and attract subscribers, which means that they are sometimes willing to take a gamble on controversial content.

By briefly looking at the historical development of the BBFC, it is clear that although it was an unintentional byproduct of the first film legislation, since 1912, the Board has lasted for over a century and resulted in great impacts on the socio-cultural policymaking. As a moral gatekeeper, the BBFC has balanced the desires of the industry and the authorities to a great extent, meanwhile, its strategies towards the industry has also undergone three stages of change. First, between the 1910s to the 1940s, the BBFC it leaned towards a middle-class moral tastes and showed strong sense of morality, as well as ideology. Even so, it stood in line with the film industry and prevented the interventions from the local authorities. Second, between the 1950s and the 1970s, the BBFC made efforts to categorise different genres for various audiences, in this respect, it encouraged the diverse content in production and

placed less moral restrictions to films on screen. At the third stage, from the 1980s, the Video Act gave the BBFC statutory power to censor a wider range of content and established the classification system. Meanwhile, a new morality has developed, certain content that concerns gender or racial inequality is no longer acceptable on screen. The BBFC has also shown a more careful and conservative attitude in its policymaking, the public consultation became the BBFC's major tool to gather evidence for further changes in its classification issues and decisions.

As an institution that has existed for a long time, the BBFC demonstrates how the development of socio-cultural policy is intertwined with the growth and innovation of the industry, the society and the government. At the same time, the changes in socio-cultural policymaking also have shaped the film industry and film culture. In the case of the BBFC, it has shaped generations of audiences by defining who is able to access what sorts of films; meanwhile, the audiences' tastes, mirrored by the society, also affected the BBFC's decision-making in different periods.

3.2.2 The history of cinema-going

Cinema is nothing without its audiences and the exhibition sector plays an essential role in film business. It is therefore important to examine how cinema exhibition and cinema-going have developed over time and how policy and legislation have both helped shape and responded to those developments. This section will deal with historical developments, while in Chapters 6 and 7 I will bring the discussion up to date by looking at how audiences watch films today, particularly after the COVID pandemic, and how film policy has responded to current challenges.

As noted in the previous section, while by 1907 purpose-built cinemas were opening across the United States, Britain and France, most film exhibitions during the 1890s and 1900s took place in temporary venues such as fairgrounds, music halls and penny gaffs. These venues were full of potential safety hazards, especially relating to fire, which the Cinematograph Act 1909 was designed to address. As noted above, the Act encouraged investment in film venues and resulted in a boom in the building of purpose-built cinemas and changes in the nature and behaviour of audiences.

Subsequently, the Cinematograph Films Act in 1927 obliged film distributors and venues to use a minimum quota of British films, the so-called Quota

Acts in the 1920s and 1930s thus were designed to regulate distribution and exhibition. While this measure was conceived as an economic support for the UK film production sector, it actually also had an impact on the types of films that audiences could watch. Furthermore, the BBFC's censorship in the meantime also affected the content that audiences were able to access to in cinemas.

In this context, as colour and sound were added to film and larger and more luxurious cinemas were built in the 1920s and 1930s, cinema-going became increasingly popular. Indeed, "going to the cinema was the mass leisure activity of the 1930s, attracting all social classes." (James, 2011, p. 286). Robert James (2011) also argues that "cinema-goers actively sought to watch films which answered their varying social and cultural needs." (p. 286). This indicates that class distinctions were shaping the different choices of the cinema-going public: some films would have a broad appeal, while others might only be booked for specific 'middle class' or 'working class' cinemas. To some extent, the complexity of audiences' tastes also allowed for the hypothesis of a specialised cinema at an early stage, for instance, *Yorkshire Post and Leeds Intelligencer* (1931) published an article in 1931, noting,

Whereas now the average cinema exhibitor in a large city sets out to draw every type of person into his house, in the future, I believe, will concentrate on securing a certain type of film. In turn, the producing companies will gauge their production-schedules according to the various circuits of specialist cinemas, making sentimental slop-films at high cost for those who like them and, if they are fortunate, better and more intelligent films for a lower expenditure for the smaller specialised houses.

To some extent, the press in the 1930s predicted the distinctive development of the commercial cinemas and independent cinemas, and the aim of having different types of cinemas being to attract maximum audiences .

While the golden age of UK cinemas occurred in the 1940s, the prosperity did not last, for the first time, cinemas faced the challenges from another medium. According to the UK Cinema Association (2021), "from an historic high immediately post-war of 1.64 billion in 1946, UK cinema admissions gradually declined to an all-time low of just 54 million in 1984." The decline was caused by several factors, first, the introduction of TV at home provided an

alternative to cinema-going, television. Furthermore, “the coming of television did not simply reduce the scale of cinema-going, it seems; it altered the relationship between cinema audiences and film performance in ways that we are only just beginning to understand.” (Ellis, 2013, p. 102). But at the same time, television cinema programme was made into televisual form, for instance, “the BBC intended to transmit two cinema programmes per week which dealt with films on West End and general release.” (Holmes, 2005, p. 459). Meanwhile, the BBC did not intend to replace the cinema with television, instead, Holmes (2005) argues that “the BBC intended to bring contemporary film culture into the home.” (p.459).

Despite the decline of cinema admissions, the government did not support the cinema business with policymaking. Rather, the Eady levy, which was introduced in the 1950s, was effectively a tax on the sale of tickets to cinema-goers. Its purposes was to support film production with the profits made from exhibition and cinemagoing.

To compete with television, the cinemas adopted various technologies innovations to try to bring audiences back. These included improvements to colour, sound and especially screen size and shape. For instance,

In 1952, the Cinerama process, using three projectors and a wide, deeply curved screen together with multi-track surround sound, was premiered. It had a very large aspect ratio of 2.59:1, giving audiences a greater sense of immersion, and proved extremely popular. (Media Museum, 2020).

The bigger screen did not stop the decline of cinema-going, due to the emergence of a second factor, the rapid growth of the video and DVD business after the 1970s, which was to prove more of a threat to the cinema model than TV. Clearly, “with this decline the choice of films available became more limited and cinema going stopped being part of the fabric of ordinary life.” (Wickham, Mettler, & Marcarini, 2005, p. 3). Although the theatrical window, the amount of time between when a film arrives in cinema and when it can move to home video mediums, was originally conceived as being six months, renting DVDs gave audiences the option to watch films at home for the first time.

At the end of the 1980s, there was a revival of cinema-going with the introduction of multiplex cinemas in the UK, which enabled the diversity of film content to match various demands. But also “the most significant impact of the multiplex cinemas was how they located themselves geographi-

cally.” (Hanson, 2017, p. 500). Stuart Hanson argues that instead of locating at the city centre, the multiplex cinemas were established in suburban and new-town sites around the country. According to a report commissioned by Government Office for Science, “In the 1980s the UK was still in the throes of ‘counter-urbanization’, which had become apparent in the previous decade both in the UK and in several other countries.” (Champion, 2014). The growth rate of population between 1981 to 1991 in Small Towns & Rural was 76.7%, while in Major Cities it was a negative 28.3%. (Champion, 2014). In this respect, multiplex cinemas were initially popular among audiences in the suburbs. In addition, improvements in film exhibition and the increasing variety of films also contributed to a commercial revival of UK cinemas. Cinema admission figures have been increasing since the 1980s and the 2018 admissions figure of 177 million, when U.K. cinema-going reached its highest level in 50 years. (Dams, 2020c).

While the government had little policy interventions to the cinema business, the ‘Digitisation of Cinemas’ was part of the UK Film Council’s ambition of a ‘Digital Britain’. According to the UKFC (2009), “The digitisation of cinemas has the potential to deliver very significant benefits to audiences and communities as regards range, choice and flexibility of programming. It also delivers efficiencies to distributors since it reduces costs significantly.”

The image of digital material on the big screen not only changed the audiences viewing experience and enabled the 3D version of films, but also benefited the multiplexes, as it allowed a more flexible programming of cinemas.

While the major commercial cinema chains have invested or collaborated with distributors to embrace the digitisation, due to the high cost of installing the digital equipment in traditional cinemas, many independent cinemas across the UK could not afford the transformation. The UKFC thus appealed to the government that “The Government needs to consider how a public policy intervention might assist such independent cinemas in making the transition to a digital world and thereby delivering benefit to communities throughout the UK.” (UKFC, 2009). However, the government did not offer immediate response, and along with the abolishment of the UKFC in 2010, the UKFC’s support to cinemas was also paused.

By analysing the history of cinema-going, it is evident that cinema has survived many challenges throughout its history, although the looks of cinemas have significantly evolved in the last hundred years or so, the functions

of cinemas and the purposes of cinema-going have barely changed. While the government policy interventions have shaped the forms of cinemas and the content of screening, the government support has focused primarily on the production sector, not the exhibition sector. Against this backdrop, I will further discuss film exhibition in Chapters 6 and 7, to examine what unprecedented government support will be provided for the exhibition sector, and whether both cinemas and streamers will take part in the ecosystem of film exhibition in the near future.

3.3 The development of economic policies for cinema

In this section, I shall discuss the key economic legislation and policies that were developed in the UK in the wake of the 1909 Act to regulate the film industry. In order to frame the discussion, I will adopt John Hill's typology of economic policies, which was briefly introduced in Chapter 2. In the first stage, during what Hill defines as the period of protectionist policy, the Quota Act of the 1920s unintentionally attracted US investment. In the second, interventionist stage, the Eady Levy and the National Film Finance Corporation (NFFC) introduced in the 1950s were intended to support the UK film production sector but caused an influx of American productions. In the third, market-friendly stage, the tax incentive policy of the 1990s attracted international inward investment in the form of big-budget Hollywood productions, with a further boost provided by National Lottery money for film production.

3.3.1 Protectionist policy

Protectionism, is the economic policy of restricting imports from other countries through methods such as tariffs on imported goods, import quotas, and a variety of other government regulations. The debate in the UK in the 1920s about free trade and protectionism was a much wider issue than the film industry. Although Britain remained officially committed to free trade into the 20th century, protectionist policy inevitably replaced free trade policy in the 1920s as "a desperate attempt to regenerate the economy" (Hansard, 2022). Free trade was firstly compromised to a limited extent by the adoption of the McKenna duties in 1915 on imported luxury items. Subsequently, Stanley Baldwin, the Conservative Prime Minister, called for a stricter tariff

protection as an urgent response to mounting unemployment in 1923. While the first Labour government in 1924 intended to defend free trade, the protectionist sentiment was the dominant force in the government in the 1920s and the 1930s. In the frame of ‘protectionist’ economic policy, UK film policy in its first, interwar phase, can be understood as protectionist in character, meaning it defended the national film industry through the adoption of quotas for British films.

The Cinematograph Films Act of 1927, also known as the Quota Act, aimed to promote a national cinema that could compete with Hollywood. Before the passage of the Act, the 1924 ‘British Film Weeks’, “an all-British programme of films to be released across the country in February and March 1924” (Gruner, 2012), had apparently not effectively halted the decline of British film productions, even if cinema-going was still the main form of mass entertainment. By 1925, a parliamentary document notes that “British film production had declined to a point where fewer than 40 feature films a year were being made, compared with over 150 in 1920. The vast majority of films shown here were American.” (Parliament, 2010). In these circumstances, the Cinematograph Films Act 1927 was designed to create an artificial market for British films. Meanwhile it was hoped that this would stimulate increased economic activity in the production sector, which would in turn lead to the growth of a self-sustaining industry.

In order for the Act and the quota system to work, a definition of what counted as a British film was needed. A qualifying ‘British film’ was defined in the Act as one in which 75% of salaries went to British subjects, including a British writer, and covered production throughout the British Empire. Furthermore, a British film should thus be made by a British company, filmed in the British Empire, and the author of the scenario or the original work on which the screenplay was based must be British. (Hansard, 1927). By insisting on relying on British producers and filmmakers to make British films, the policy makers in the 1920s thus aimed to support the UK film production sector by limiting the presence of American films within British cinemas. According to Sarah Street (2009),

The Act imposed a statutory obligation on renters and exhibitors to acquire and show a quota of British films. In the first year the renters’ quota was 7.5 per cent and the exhibitors’ was 5 per cent...both were to increase by stages to 20 percent in 1936, and

to remain at that level until 1938 when the Act expired. (p. 9)

These criteria indicate that the Quota Act was focused on creating a stronger national cinema by taking an economic approach.

There is no denying that the Act was welcomed by the industry at first and was regarded as an ideal strategy to support the production sector. According to *The Bioscope's* (1928) report about a parliamentary debate in 1928,

Sir Philip [Cunliffe-Lister, the President of the Board of the Trade] said the situation was proving a tremendous success and a great impetus was being given to the production of British films. There had been a great increase in the quantity and, he understood, by common consent, a great advance in the quality also.

However, the boost given to high-standard film-making did not last, and there are two major reasons for this. First, it is worth noting that the quota was set for exhibitors and distributors. The exhibitors at this stage were primarily British-owned, but several of the largest distributors were American. The vertically-integrated system in the US at the time facilitated the global expansion of major Hollywood distributors. The major studios exerted significant control over film production, distribution, and exhibition. They not only produced, released, and marketed their films but also owned the cinemas where these films were screened. The expansion enabled the studios to engage in exhibition worldwide and implement revenue-sharing mechanisms to achieve significant financial returns. As Richard Gil highlights the revenue sharing distortions in the film industry, “When a distributor vertically integrates with an exhibitor, the distributor is the full recipient of box office and concession receipts.” (Gil, 2009, p. 580). Under these circumstances, John Sedgwick and Michael Pokorny (2005) note that “the British system of distribution was determined, and then dominated, by the same American distributors, who, given the moribund state of British production during the 1920s, had the field largely to themselves.” (p. 85). On the one hand, the American distributors invested in cheap UK film productions, so that they were able to meet the quota for the proportion of British films they distributed. On the other hand, as block booking, a system of selling multiple films as a unit to a theatre or chain, was made illegal by the Cinematograph Films Act of 1927, “the exhibitors had to screen a rising proportion of indigenous product to attract cinema-goers.” (Sedgwick & Pokorny, 2005, p. 85).

Second, because the Quota Act itself provided no test of quality, it therefore allowed a significant number of low-cost and low-quality films, referred to as ‘quota quickies’, to be produced and financed by American companies. It is clear that the ‘quota quickies’ were produced primarily for the purposes of meeting the quota. Thus, the quota quickies were often invested in by American distributors and sold to British exhibitors; in doing so, Hollywood productions managed to maintain a profitable revenue share of the British market, while conditions remained less than perfect for British producers.

The Quota Act, despite its aim to create a guaranteed market for British filmmakers, is widely recognised as an ineffective measure. Oliver Stanley, the President of the Board of Trade at the time, admitted in 1937, “The fundamental advantages which the American film producing industry had over ours in 1926 still remain – economic advantages – and they have not been changed.” (Stanley, 1937).

Thus, the Quota Act contributed to the UK film industry, “in the sense that production of films in the UK more than doubled by the end of the decade, and resulted in the establishment of several new production companies.” (Parliament, 2010). However, the protectionist policy did not adequately address the underlying issues of the Hollywood’s domination of the film industry and the lack of finance for British film production. The Cinematograph Films Act 1927 was eventually modified by the Cinematograph Films Act 1938, removing films shot by nations in the British Empire from the quota and further acts. As was later explained, “The Cinematographic Films Act 1938 confirmed the retention of quotas, at 15 per cent for distributors and 12.5 per cent for exhibitors. This was intended to encourage bigger budget films, which could compete internationally. It also encouraged American film companies to make films in the UK, thus getting around the quota restrictions.” (Parliament, 2010).

The post-war era saw a transformation in the British film industry and a controversial result of the quota system. The Cinematograph Act 1948 raised the quota to 45%. *Guardian* (J. Williams, 2010) argued that the higher quotas not only ensured a larger share of British films in the domestic market but also encouraged international distribution and recognition. British cinema gained prominence on the global stage, contributing to the “golden age of British cinema”. However, the 1949 Cinematograph Act subsequently fixed the quota for feature films at 40%. Lord Lucas of Chilworth had sarcastically explained

the changes, expressing his disappointment in the film industry's failure to meet the quota despite assurances from British producers.

Given an assurance by the British producers that they would make available the number of films necessary— and this I would impress upon noble Lords— my right honourable friend imposed a quota of 45 per cent. I maintain that His Majesty's Government had every right to expect that the British film producing industry would seize this opportunity of establishing itself, produce the number of films which they said they were capable of doing, and make the 45 per cent. But neither of those two things happened, and it is pertinent to ask why. It appears that there was an entire lack of confidence in the industry. ([Hansard, 1949b](#)).

This context highlights the controversial nature of the quota system and the challenges faced in achieving the desired outcomes. Mr. Harold Wilson, the President of the Board of Trade, thus claimed in 1949 when he proposed to reduce the quota,

The Board of Trade and the House must have in mind ensuring exhibitors a reasonable choice of films for their patrons—those who come to the box office—and, therefore, it would be quite wrong to fix the quota, merely in the interests of encouraging British film production, which is too high in relation to the films of good quality which may be expected to materialise during the year. ([Hansard, 1949a](#)).

The quota system therefore reflected a power struggle between the producers and exhibitors. The differing interests and perspectives of these two sectors shaped the discourse around the quota system and its impact on the industry.

The quota system remained in place until its suspension in 1983 and its abolition indicated the end of the period of government protectionism for the film industry. The quota system played a significant role in shaping the British film industry, both positively and controversially. It provided opportunities for British filmmakers, but it also faced criticism regarding its implementation and effectiveness. The eventual abolition of the quota system marked a shift towards a more open and market-friendly approach in the film industry. It is also important to highlight that protectionist measures continued to be in

effect alongside other interventionist policies until their abolition, resulting in overlapping implementation.

3.3.2 Interventionist policy

Economic interventionism can be understood as an economic policy that favours government intervention in the market process to correct market failure. In this context, the Eady Levy and the National Film Finance Corporation (NFFC) instituted public subsidies for production and represented the government's interventionist stance towards the film industry in the post World War II period. The purpose of the policies were not simply to protect the British film industry from competition, but for the state to intervene further by providing some form of government-enabled investment in production. Margaret Dickinson and Sarah Street (1985b), as well as James Chapman (2022), have examined the NFFC and Eady Levy in their books *Cinema and State* and *The Money behind the Screen*. As their studies have comprehensively covered these topics, I do not aim to reiterate their research or detail the origins or full extent of the policies. Instead, my focus will be on examining the impact of government interventionist policies on the film industry during the 1950s and 1960s.

The financial aids were introduced partly because of the decline of cinema attendance, as Dickinson and Street (1985b) note that it was “on the brink of the long period of decline and adjustment associated with the spread of television.” (p. 227). But also, Hollywood's domination and the lack of finance for film production once again became the government's concern in the late 1940s. (Parliament, 2010).

The NFFC was introduced in part in response to a financial crisis affecting a key British producer of the period, Alexander Korda's British Lion Film Corporation. As Chapman notes, in 1948, “British Lion Film Corporation was severely compromised. Alexander Korda's ambitious production programme had sustained heavy losses and British Lion needed an immediate bail-out if it was to continue making films.” (Chapman, 2022, p. 78). The NFFC was founded under the authority of the Cinematograph Film Production (Special Loans) Act of 1949 (Parliament, 2010). Operated as a government agency, the NFFC aimed to provide loans and investments to film production companies and support the distribution and exhibition of British films. Subsequently, in 1950, “the Government introduced the Eady Levy, which was a voluntary levy

on a proportion of the price of cinema tickets; half retained by the exhibitors and half going to the makers of films made in the UK, in the expectation that it would be used to fund new British film productions.” (Parliament, 2010). For example, in 1950, the levy was one-quarter of a penny per ticket; half of the levy was to be retained by exhibitors as a tax refund, and half would be divided among qualifying British films in proportion to UK box office revenue. In this case, instead of promoting the exhibitors’ interests, Chapman notes that “the government was more favourably inclined towards addressing the problems faced by producers.” (Chapman, 2022, p. 97).

The establishment of the NFFC and the Eady Levy represented the government’s interventionist policy to provide financial assistance to the UK film industry, however, they also represent different approaches to interventions. First, the role of the NFFC was to provide loans for producers who faced challenges in securing funds for their projects. Harold Wilson, the President of the Board of Trade, noted in a parliamentary debate in 1950, “The Corporation has generally provided “middle money” or, as it says in the Report, “the front part of the end money.”” (Hansard, 1950). In this case, the Corporation could ensure that its loan was not the first money to be lost. In contrast, the Eady Levy represented a different approach to intervention, as it was a voluntary levy imposed on a proportion of cinema ticket prices. Dickinson and Street (1985b) note that “the government held to the view that the Levy did not constitute a subsidy.” (p. 226). Therefore, while the NFFC focused on providing direct financial support to film producers, the Eady Levy operated through a voluntary contribution system tied to cinema ticket sales.

In this context, examining the impact of government subsidies and policymaking on the UK film industry is indeed crucial to understanding their contributions. On the one hand, the NFFC was crucial to the film industry, Wilson (1950) argued that “if the Government had not established the National Finance Corporation a year ago there would have been by this time an almost total collapse of British film production.” James Chapman (2022) also commented that the developments around “the National Film Finance Corporation (NFFC) were remarkable in many respects – not least of which was the speed and alacrity with which the government acted once it had decided upon a course of action.” (p. 77).

On the other hand, there were also criticisms and debates surrounding the effectiveness of these interventions. In particular, “The election of a Conserva-

tive government on 25 October 1951 threw the whole future of the NFFC into question” (Chapman, 2022, p. 90). Chapman (2022) noted that “it would seem that the new government would probably have liked nothing better than to abolish the NFFC – one of the easier targets left behind by its predecessor given that the Conservative manifesto had undertaken not to dismantle Labour’s social reforms or to reverse its nationalisation of key industries”. (p. 91). Furthermore, the profitability of the NFFC was a major concern and subject to parliamentary scrutiny during its early years. In 1953, Lord Archibald noted,

It seems to show profits on films financed by the Corporation for the years to March, 1951, and March, 1952, amounting to £187,000 and £80,000 respectively. In each of these years something like £5 million was invested in the production of films, and considered as returns on a £5 million investment, profits of £187,000 in one year and £80,000 in the next year can hardly be regarded as entirely satisfactory. (Hansard, 1953).

He further argued that the film production industry had not progressed substantially under the NFFC, as employment figures had not improved. (Hansard, 1953). In 1954, Sir W. Smithers, a Member of Parliament, again raised concerns as he believed that “the nationalised industries have caused heavy losses to the taxpayer and to the consumer.” (Hansard, 1954). In response, Henry Strauss, the Parliamentary Secretary to the Board of Trade, highlighted that a significant portion of the losses associated with British Lion, the production company whose crisis triggered the introduction of the NFFC, happened at the beginning or even before the operation of the NFFC. (Hansard, 1954).

It is worth noting that it often takes time for any organisation, including the NFFC, to establish itself and operate effectively within an industry. Meanwhile, although the NFFC “would make a modest profit or loss each year” (Chapman, 2022, (p. 92)) since its establishment, its primary role in providing financial assistance to production companies helped sustain the industry. Even Lord Archibald admitted that it would have been a great pity if the steady flow of production from production companies, such as Ealing, had been brought to an end through lack of finance. (Hansard, 1953).

Similar to the NFFC, the Eady Levy also had significant impacts on UK film productions, as well as its own challenges. By the time Sir Wilfrid Eady retired from the Treasury in 1952, “‘Eady money’ had become such an important feature of the financial landscape of the British film industry – it could

add around 25–30 per cent to the box-office returns for a successful film – that producers were arguing for its retention.” (Chapman, 2022, p. 104). As the Eady money was paid to the British Film Fund, the Film Fund was also used to make payments toward the Children’s Film Foundation, the National Film Finance Corporation, the British Film Institute, and the training of filmmakers. (Fenwick, 2017, p. 192). For instance, when the Conservative Government came to power in 1951 and sought to dismantle the initiatives of the previous administration, Denis Forman, the Director of BFI at that time, “managed to persuade the British Film Production Fund, which distributed the proceeds of the so-called Eady Levy on film exhibition, to provide £12,500 to keep it [the BFI] going.” (Nowell-Smith & Dupin, 2012a, p. 34).

Despite the Eady Levy’s intention to boost domestic film production and support the industry, the levy had controversial results. First, Dickinson and Street (1985b) argue that “Producers received payments in proportion to the box office earnings of their films, so those who benefited most were those already favoured by the system of distribution and exhibition.” (p. 266). As a result, the major production companies reaped the most substantial benefits from the levy.

Second, the Eady Levy also unexpectedly led to the relocation of a significant number of American productions. As Fenwick (2017) notes, “What wasn’t anticipated was the nature of the American runaway production that would come to dominate the Eady fund by complying with its criteria and in the process becoming “British” films”.” (p. 193). ‘Runaway productions’, explain Dickinson and Street, was “the term used to describe co-productions and productions partly or wholly American-funded.” (Dickinson & Street, 1985b, p. 235).

The runaway productions resulted from several factors. Chapman (2022) notes,

The immediate incentive for Hollywood to invest in the British production sector was that it was a means of using blocked sterling. The framework for this was provided by the Anglo-American Film Agreement of 1948. The basic provisions of this agreement – revised in 1950 and renewed in 1952 and 1956 – remained in place throughout the 1950s. American companies were only allowed to repatriate a maximum of \$17 million of their earnings from film distribution in the United Kingdom per year.” (p. 162-163).

As these earnings by American companies could not be repatriated directly, the money was “used to produce films which could then be exported and made to earn back their investment.” (Stubbs, 2009, p. 3). The Eady Levy clearly encouraged Hollywood’s investment in American productions in the UK. The liberal definition of a British film under the Eady Levy allowed American producers to also benefit from the revenues they generated, as long as their films were made in Britain. (Stubbs, 2009, p. 6). Consequently, in the 1960s, “the American capital was flowing into the industry on an unprecedented scale. As the Americans became more involved in British finance, there was a corresponding decline in the part played by British finance and renters.” (Dickinson & Street, 1985b, p. 233). The increased American involvement in British finance therefore brought about a shift in the financing landscape of the UK film industry.

Thus, the establishment of the NFFC and the implementation of the Eady Levy represented notable shifts in government policy towards the UK film industry. These measures marked the first direct subsidy provided by the government to support film productions, representing an interventionist approach. However, it is worth noting that despite these interventionist policies, American capital continued its dominance in the UK industry. As noted by Dickinson and Street, Lord Willis, President of the Writers’ Guild, had pointed out at a House of Lords debate in 1966, “By a strange paradox, most of our film legislation has had an effect which is the precise opposite of its intentions.” (Dickinson & Street, 1985b, 239).

Following the abolition of the NFFC and the Eady Levy by the Cinematograph Act of 1985, the British Screen Finance Consortium (subsequently British Film Finance Limited) continued the NFFC’s ‘interventionist’ functions (Hill, 1993, p. 206). It is worth noting that the funding for British Screen Finance was not directly provided by the government. Instead, Channel Four, Cannon and Rank were the three main private investors that agreed to provide loans for a period of five years. However, after three years, only Channel Four continued its investment. (Hill, 1993, p. 207). This change in investor participation highlights the challenges of securing sustained financial support for the film industry, especially from private investors. In 2000, British Screen Finance was folded into the newly established Film Council, a government agency that took on the responsibility of supporting and promoting the UK film industry. (Minns, 2000). The interventionist policy thus was again

adopted in the form of government subsidies for the film industry. By the early 1990s, British film policy was entirely ‘interventionist’ in Hill’s terms, yet the capital available for such intervention was at an all-time low due to the free-market doctrine of Thatcherism.

In conclusion, in this second phase of interventionist economic policy, the Eady Levy, introduced in 1950, prompted Hollywood to relocate film production to British locations on a large scale, leading to inward investment of millions of pounds in the British film industry and the financing of hundreds of projects technically defined as British.

The result, James Fenwick notes, was that the Levy “intensified the so-called Hollywood runaway production- the relocating of pre-dominantly American financed pictures to the UK, among other countries- and would profoundly affect the British film industry throughout the 1960s.” (Fenwick, 2017, p. 1).

Thus, the government in the 1950s not only recognised the need for Hollywood films in the UK film market, but also valued Hollywood capital in UK film production sector. Although the primary goal of the Eady Levy was to retain a certain amount of Hollywood’s box office in the UK and put the funds into UK production, it also attracted a form of inward investment and inadvertently benefited US studios. Additionally, the establishment of the NFFC marked the government’s initial effort to directly subsidise the UK film industry. While the government gradually shifted towards a more market-friendly approach starting in the 1990s, a “social-democratic interventionist” (Hill, 2016) form of financial subsidies and loans coexisted with market-friendly policies. These two approaches became the pillars of contemporary UK film policies, with both interventionist measures and market-friendly strategies playing significant roles.

3.3.3 Market-friendly policy

Hill describes the third phase of policymaking, starting in the 1990s, as placing increasing emphasis on the provision of market-friendly incentives. The idea of ‘market-friendliness’ was also influenced by Neo-Classical economic theory, a free market approach to trade that emerged in the 1980s, and this new perspective was soon adopted by policymakers in relation to the film industry. (Economics Online, 2020). The policy from the 1990s thus attempted to create a more friendly market for global players and investors while maintaining a degree of control of over the general direction of the economy. As Nathan

Townsend (2021) also notes,

While Hill's periodization usefully describes a shift in policy emphasis over time, it is important to note that successive UK governments have continued to pursue both market-friendly and interventionist strategies since the 1990s, albeit with a varying degree of commitment. (p. 32).

Although market-friendly policies didn't explicitly start until the 1990s, the key moment in the move towards more market-friendly policies was the mid-1980s, as the Conservative government removed the various supports for the film industry discussed above, with the quota system being suspended in 1983 and the Eady Levy and the NFFC being abolished by the Films Act 1985. As Nick Redfern (2007) points out, "The era of protection and subsidy came to an end with the Films Act 1985, which abolished the quotas and used public subsidy as seed funding to attract private finance into the industry. The emphasis of film policy shifted towards the commercial and international appeal of British films." (p. 151).

The removal of state financial support for the film production sector led to the decline of film production through the second half of the 1980s. The neo liberal economic policies introduced sought to place the film industry in a free-market setting. However, when governments leave the markets to work unimpeded, the markets sometimes fail to develop in a way that benefits domestic production. This suggested to policy makers that a so-called market friendly approach could not be a pure free trade approach, instead, some form of state intervention was required.

In this case, government support was brought back in a different form in the 1990s when "aimed a great deal of publicity, Margraet Thatcher herself chaired a one-day seminar at Downing Street on the future of the British film industry." (Hill, 1993, p. 219). While a number of promises were made in the seminar, the subsequent transition from Thatcher to John Major in 1991 saw many of these commitments delayed or ultimately abandoned. John Hill (1993) thus points out, "while the government was now prepared to countenance some degree of intervention on behalf of the industry, it was only prepared to go so far." (p. 220). As a result, the government's approach became explicitly market-friendly from the 1990s onwards.

The market-friendly approach to economic policymaking was built on the wider economic debates about the idea of attracting inward investment, as a

market-friendly strategy. Consequently, in 1992 the Conservative government reintroduced fiscal support for the film industry, this time in the form of tax relief covered by a clause in the Finance (No. 2) Act 1992. Section 42 of this Act first introduced tax relief for production or acquisition expenditure, and the legislation was applied to films that qualify as 'British' under Schedule 1 of the Films Act 1985. The Films Act 1985 required the filmmaker or the film company to belong to the UK or a country in the Commonwealth for the film to be qualified as British. It is also interesting to note that a film was not qualified if the proportion of "photographs taken or sound recordings made outside the United Kingdom exceeds 20 per cent of the total playing time of the film or made in any studio outside the United Kingdom exceeds 7 1/2 per cent, of the total playing time of the film." (UK Government, 1985). In this context, the Britishness of the films that qualified for tax relief was defined by the nationality of the filmmakers or film companies and the production locations.

Unfortunately, the relief available under the 1992 Act failed to live up to expectations, as the available tax relief for a British film in the 1992 Act could "not exceed 20 per cent of the budgeted total expenditure on the film, as calculated at the first day of principal photography." (UK Government, 1992). Furthermore, there were restrictions on budgets: "any amount deducted for a relevant period under above shall not exceed—one third of the total expenditure incurred by the claimant on the production of the film concerned or the acquisition of the master negative or any master tape or master disc of it." (UK Government, 1992). Nick Redfern (2009) notes that "Under section 42 it was expected that film producers could generate an immediate cash sum of between four and eight per cent of a film's budget." In this context, the first attempt of tax relief was not as effective as expected. Indeed, "the Advisory Committee on Film Finance, chaired by Sir Peter Middleton, reported in 1996 that the tax arrangements and definition of a British film were a deterrent to potential investors." (Redfern, 2009).

Although the Conservative government that had introduced tax relief and the wider market friendly policies was replaced by the Labour government that won the general election in 1997, the market-friendly approach was also adopted by the Labour government. Shortly after the election of Tony Blair's New Labour government, an important development took place with the passing of the Section 48 Finance (No.2) Act 1997. This legislation introduced

changes to the rules governing the writing-off of production and acquisition expenses for British qualifying films. Under these new regulations, films with a budget of £15 million or less became eligible for tax relief. ([Government Legislation, 1997](#)). The Act signalled a commitment from the government to create a market-friendly environment conducive to its growth.

According to Geoffrey Macnab ([2018b](#)), “Chris Smith , [(former Secretary of State for Culture, Media and Sport)], recalls that Brown introduced the incentive in the face of ferocious opposition from his own civil servants in the Treasury...they saw it as tailor-made for tax evasion.” (p 138). Brown nevertheless insisted that “[the policy] will not only boost the number of British films but the British economy by boosting our exports”. ([Seely, 2007, p. 3](#)).

Despite the controversy caused by the revised tax relief policy in 1997, Macnab sees it as a symbolic moment, arguing, “Twelve years after the abolition of the Eady Levy, the government was again providing the UK industry with significant support.” ([Macnab, 2018b, p. 138](#)). Indeed, Brown’s announcement and the revision of tax policy was in line with the New Labour Government’s idea of creative industries, as the Creative Industries Task Force was set up by the Government’s Department for Culture, Media and Sport (DCMS) in the same year. As I shall discuss in the next section, the film industry, as part of the creative industries, was now expected to stimulate and contribute to the growth of the UK economy.

The tax relief policy proved to be popular in the industry and among investors. Initially relief was to apply to expenditure incurred in the period from 2 July 1997 to 1 July 2000, and was then extended twice until 1 July 2005. Between 1997 and 2006, the tax relief under 1992 Section 42 of the Finance (No.2) Act and 1997 Section 48 of the Finance (No. 2) Act increased from £10 million to £560 million per year. ([Seely, 2007, p. 9](#)). Furthermore, “the £2000 million in tax relief [in total from 1997 to 2006] represents approximately 55 per cent of the total UK expenditure on film production.” ([Redfern, 2009](#)).

Andrew Higson ([Higson, 2011](#)) notes that “the most significant source of public financial support [in this period] was, perhaps surprisingly, the various tax breaks, and the related loopholes exploited by film financiers.” (p.14). However, while the policy ushered the film industry into a “new gold-rush era in British film financing” ([Macnab, 2018b, p. 230](#)), it also had some negative impacts. As Macnab ([2018b](#)) argues that,

Hundreds of millions pounds were to pour into the industry, sup-

porting films of variable quality, many of which wouldn't be shown in British cinemas, there was to be the rise of a new breed in British film-making, the so-called 'middleman'; wealthy footballers, celebrities, industrialists and even politicians were to pump their money into the film financing schemes." (p. 231).

Although the 1997 tax relief policy brought a certain amount of private investment into the film industry, there were a number of loopholes in the system, which was clearly not sustainable for the industry or the government. After trying to "close a number of avoidance schemes that exploit the tax reliefs for UK film production" in 2004 (HM Treasury, 2004), the government was determined to improve the tax relief policy. Meanwhile, growing competitiveness between filmmaking destinations to attract US investment, such as Canada, Australia and Ireland, urged the government to produce a new strategy to compete with the rival countries. Furthermore, a consultation was carried out by the Treasury, with independent filmmakers and the US studios, "The studios confirmed that while it was currently not economically viable to make films in the UK, they would return if the value of tax relief increased." (Magor & Schlesinger, 2009, p. 313). Under these circumstances, the Treasury announced in its *Budget 2005* that,

The Government has concluded that the current structure of the relief is no longer effective for this purpose [of supporting a sustainable UK film industry] and intends to replace it next year with a structure that is similar to the new tax relief model that has been proposed for low budget films. (HM Treasury, 2005).

Therefore, while the change of tax relief was aimed at preventing tax evasion in the first place, it also enabled the British industry to attract more inward investment, primarily from the US. Distinctive from the protectionism of the 1920s and the interventionism of the 1950s, this market-friendly approach to film economic policy encouraged inward investment by offering more attractive tax incentives. As Maggie Magor and Philip Schlesinger (2009) comment, "film tax incentives are a mechanism for delivering subsidies to an industry without the direct intervention of government officials." (p. 299). Magor and Schlesinger's distinction aligns with John Hill's earlier observations, highlighting the transition from interventionist funding to a more market-friendly approach. This shift indicates a strategy to attract international capital and

contribute to the nation's economic growth while reducing direct government intervention in funding decisions.

This change in focus begun in the 1990s was also followed by the government's promotion of public subsidies through Lottery Funding and Labour's rethinking of the film and related industries as so-called creative industries. Tax relief policy was clearly in line with the idea of creative industries, the first descriptive definition of which were adopted by the Creative Industries Task Force in 1998. This represented a huge promotion of the economic importance of the culture sector by policy discourse. (UNESCO, 2013). The changes in terminology have not only a pragmatic but also a symbolic significance, as it is pointed out in the UNESCO review, "there has been a shift from subsidised arts and centralisation to cultural domains in the generation of wealth." (UNESCO, 2013). In this respect, the proposal of creative industries indeed showed market-friendly initiatives, demonstrating that the economic values of film industry were recognised by the government in the framework of the UK creative economy.

Apart from promoting this market-friendly strategy, the Labour government elected in 1997 also inherited the National Lottery fund, which had been under the charge of the Art Council. 'The lottery fund had provided a subsidy for the film production business from 1995, and was as such an explicitly interventionist policy on the part of the government.

According to James Caterer (2007), between 1995 and 2000, the Art Councils "ploughed £135 million of Lottery money in to the UK film industry. This investment caused a boom in the production of commercial feature films, enabled an ambitious attempt to tackle the film industry's underlying structural problems through the Lottery Franchise scheme, and triggered the overhaul of public support mechanisms for film which led to the creation of the Film Council in 2000." (p. 2). Although the lottery fund provided support to the industry in the form of subsidies, its economic goal was to lever in further private investments. Caterer (2007) argues that "the Lottery money was to be an equity investment rather than a straight-forward grant, [and] recoupment was expected." (p. 68). This indicates that it was a capital pool of public money that was designated to be invested in commercial films. In this context, the National Lottery Fund shared similar goals with the NFFC in the 1950s, providing financial assistance to various sectors. During the 1990s, the National Lottery Fund worked alongside British Screen and the BFI Production Board,

which played interventionist roles in funding and supporting film industry.

The third stage of the UK government's film economic policy from the 1990s on-wards thus obtained two separated approaches to supporting film production. One was the market friendly approach to attract inward investment to boost the creative economy; the other was the interventionist approach to provide subsidies to indigenous productions. While the merging of interests between the Arts Council and the Treasury came in 2000 with the formation of the Film Council, The two approaches remained as key strategies to support the film industry.

In conclusion, economic film policymaking has often been designed to align with the UK's wider economic strategy and trade policy in different periods. Since the 1920s, the UK film industry has been in the shadow of Hollywood's economic and cultural dominance, and different governments have held different opinions towards official interventions in the film industry, which has resulted in various discontinuous policies that have been applied to the industry over a period of more than a hundred years.

However, protectionist policy and interventionist policy failed to reach their goals and led to unexpected results; protectionism regarded Hollywood films as a competitor and attempted to limit Hollywood's box office in the UK, while the interventionism aimed to tax Hollywood's box office revenue to subsidise the indigenous film productions. Both measures led to an increase of inward investment and ironically contributed to Hollywood's profits in the UK while also encouraging investment in the film production infrastructure. It was thus evident that resisting Hollywood or limiting its profits could not help the UK film production sector, and the government had an important role in seeking to re-orient the industry through its policymaking strategies. Notably, the inadvertent consequence of Eady Levy became the goal of the government's market-friendly strategy, as it resulted in the growth of inward investment projects, which benefited from the tax incentives. Finally, the shift to market-friendly policy indicates that the government has recognised the sum of economic value that could be created by the film industry as a whole. Meanwhile, indigenous film productions would continue to require UK government subsidies – so long as we recognise that lottery funding was regarded as recoupable investment.

3.4 The historical development of international film strategies in the UK: co-production policy and practice

In addition to the three phases of economic policymaking discussed earlier, there is another significant aspect that has influenced UK government policy in the film industry: the development of film co-production policy. It is possible to divide co-production into two categories: official and unofficial. Official co-productions are those that are completed under bilateral co-production treaties, led or sponsored by governments. Unofficial co-production refers to partnerships between production companies from different countries without a bilateral co-production treaty. For instance, collaborations between the UK and the US, including the inward investment films, can be viewed as examples of unofficial co-productions. These partnerships involve production companies from both countries joining forces to finance and produce films without the existence of a formal bilateral co-production treaty. On the other hand, the UK has established official co-production relationships with key countries for its film exports, particularly in Europe and Commonwealth territories. These official co-production agreements are based on bilateral treaties or agreements between governments, which provide a framework for cooperation and mutual benefits in film production and distribution. These treaties facilitate the sharing of resources, talents, and funding between the participating countries, promoting international collaboration and market access. These official co-production agreements serve as interventionist approaches to create closer ties and enable effective collaborations with its partners, while unofficial co-production reflected a more market-friendly approach. By embracing both official and unofficial co-productions, the UK aims to enhance its film exports and strengthen cultural exchange with its co-production partners.

This section will analyse the historical development of the UK's international film strategy – in particular, I shall examine international distribution and film co-production between the UK and its targeted territories. This discussion demonstrates the impact of such a history on the UK's contemporary international strategy, which is further examined in Chapter 5.

3.4.1 Co-production practice between the UK and European countries

As far as the UK was concerned, the purpose of international co-production was initially to expand the UK film distribution. However, along with the domination of American films since the 1920s, the UK's local productions could barely attract the attention of international audiences or contribute to overseas distribution. In this context, unofficial international co-productions were initially promoted to increase international distribution.

The European film industry faced a similar dilemma as the UK film industry in the 1920s. The domination of American film and the difficulties surrounding international distribution stimulated industrial cooperation between European countries for the first time, including a close collaboration between the UK and other European countries. According to Gerben Bakker(2005),

In the 1900s the European film industry was in good shape. European film companies pioneered both technological innovations...and content innovations...They held a large share of the US market, which at times reached 60 per cent. By the early 1920s, all this had changed. The European film industry only held a marginal share of the US market, and a small share of its home markets. (p. 312).

Bakker further argues that these shifts were caused by the impact of the First World War on international trade, on the changing tastes of the American consumer and the development of the US film industry. In particular, he notes the escalation strategies adopted by the American film industry between 1915 and 1917, which resulted in an enormous increase in average film production costs that out-bid European companies. In response to these circumstances, Jonathan Stubbs (2021) notes that “the idea of institutionalised collaboration within the film industries of Europe first emerged in the 1920s in response to the growing economic power of the American film industry.” (p. 155). Andrew Higson and Richard Maltby (1999) point out that the term ‘Film Europe’ began to be used “in the 1920s—particularly in German trade press—to describe a pan-Europe film industry that made international co-productions to challenge American distributors.” (p. 2).

However, the Film Europe movement was mostly active in the late 1920s and the early 1930s. As Stubbs (2021) points out,

The impact of synchronised sound and the rise of nationalism at

the end of the decade put an end to the Film Europe movement. Rather than competing with America, European nations worked individually to fend off Hollywood imports through protectionist policies, most notably screen and import quotas. (p. 155).

Higson and Maltby (1999) also note that “at one level, Film Europe meant the development of international co-productions ... at another level, it meant reciprocal distribution agreements between renters in different nation-states and other efforts to rationalise distribution on a pan-European basis.” (p. 3). Film Europe thus represented the emergence of both the unofficial international co-production and international trade agreements between companies rather than countries as a means for the UK and other European countries to develop their film businesses.

Furthermore, Higson and Maltby (1999) consider the history of Film Europe as both an economic strategy, and a cultural practice. (p. 17). In particular, the Film Europe movement engaged with the prevailing ideas of internationalism, although Europe’s diverse languages and cultures have inevitably created tensions between cultural and economic interests.

Cooperation between various European countries’ film industries resumed after the end of the Second World War. The first official co-production treaty was signed between France and Italy in 1949 (Bergfelder, 2004, p. 55), although the UK’s first international co-production treaty, the Franco-British agreement, was not signed until 1965 (Stubbs, 2021, p. 155). Since then, bilateral international co-production has been essential to the UK’s international film strategy not only in terms of increasing the market share in European countries but also in terms of reducing the risks associated with film financing.

However, several scholars have argued that co-production activities between the UK and European countries have not been as productive as Anglo-American filmmaking. For example, in relation to UK–France co-production, Stubbs notes that “the British government was slow to adopt co-production arrangements and British film-makers tended to be more reticent about using them once they were made available. (Stubbs, 2021, p. 152). Steve Chibnall finds that the co-productions between the UK and other European countries have obtained both cultural and industrial significance; however, due to changing economic interests and political landscapes, such partnerships may be dynamic. By analysing film co-production between the UK and Italy in the

decade following the Second World War, Chibnall argues that co-production had contributed to the reimagination of Italy. Furthermore, “British companies, working under tough conditions in the early post-war years, demonstrated that it was possible for foreign film-makers to collaborate with Italian producers, directors, studios and technicians on pictures for an international market.” (Chibnall, 2013, p. 262). As a result, Hollywood quickly came to appreciate the potential of co-producing with Italy. As Chibnall (2013) also notes,

With the coming of the New Elizabethan Age ... British film-makers and their audiences became increasingly preoccupied with filming Blighty and the Commonwealth of their young sovereign. At the same time, Rome, briefly open for British production, had gradually discovered that the Americans could offer greater financial rewards and wider world exposure. (p. 262).

Under these circumstances, although cooperation with European countries has both economic and cultural significance, Neil Archer (2020) points out, “Despite its proximity to Britain - and the rather more obvious point that Britain had been a member of the EU and its earlier manifestations since 1973 - Europe had for some time prior to the EU referendum been the less attractive target for British film policy”. The 1960s witnessed the introduction of co-production treaties with France and Italy, however, their relative lack of success contrasted with Britain’s ongoing strong connections with America. Neil Archer (2020) points out, “Despite its proximity to Britain – and the rather more obvious point that Britain had been a member of the EU and its earlier manifestations since 1973 – Europe had for some time prior to the EU referendum been the less attractive target for British film policy, especially during the years of the UK Film Council.” (p. 55). Therefore, the UK film industry and its policymakers have consistently pursued a co-production strategy as an essential international approach that aims to achieve both economic and cultural goals in Europe. However, it is important to note that the US film industry has obtained a more dominant role in the UK film industry over time.

3.4.2 The co-production practice between the UK and the US

While the UK and the USA never formed an official co-production treaty, the USA has been the UK's most active partner in film production, and UK film industry has a long history of orchestrating unofficial co-productions with the US. It is worth noting that the US does not obtain any co-production treaties with any other countries, because it has one of the largest and most influential film industries globally, with Hollywood being a major hub for film production and distribution. The US film industry has a significant financial resources and talents, which clearly reduce the need for official co-production treaties. In this context, Hollywood has instead adopted the alternative strategy of exploiting production conditions in various parts of the world, investing in places such as the UK when those conditions are favourable. As a result, as I have already noted, , the US has been the biggest investor in the UK film industry, and UK-US co-production has relied heavily on American funding. I shall discuss UK-US co-production endeavour as it is distinct from the various collaborations between the UK and the EU.

As we have seen in earlier sections, the intertwined relationship between the US and the UK film industries started from an early stage. In addition to that, it is important to note that UK producers also targeted the US film market before the American film's domination. Sarah Street observes that a prevailing assumption holds that British films occupy only a small share of the American film market because of Hollywood's domination of the home market. However, in her study of the cross-cultural reception of these films, Street argues,

While the opportunities for extensive distribution and exhibition were limited, many British films were popular with metropolitan audiences, occasionally 'crossing over' to wide circulation in 'the nabes' [neighbourhood cinemas] and beyond. (Street, 2002, p. 1).

Nathan Townsend also notes what the terms 'Transatlantic British Cinema' has played an essential role in the British film industry for many years. As I have discussed in Chapter 2, "the strategies of economic, globalising and affinitive transnationalism define the substance of Transatlantic British Cinema and respectively work to reduce the industrial, formal and cultural distance between British and Hollywood cinema." (Townsend, 2021, p. 17). There is no doubt that some British films had been intended to break in to American mar-

ket, and the attempt had partly succeeded in the 1920s, *The Bioscope* (1921), for instance, reported that,

“Carnival,” the first super-film masterpiece produced for the Alliance Corporation by Harley Knoles, has been acquired by the Allied Artists Corporation of America. The sale of the American rights reached a record figure, and the President of the Corporation who purchased this film declared it to be the finest British production ever seen in America.

Carnival was also sold to European countries and to the UK’s colonies at the time, with *The Bioscope* (1921) reporting that “the Alliance Film Corporation have achieved their ambition to produce pictures that would have a world-wide appeal.” While the Allied Artists Corporation went into liquidation shortly thereafter, this case showed an example of how releasing British films in the US and worldwide has been a strategy of British film companies since the early development of the British film industry.

The situation regarding UK film’s international distribution shifted in the 1920s. The Cinematograph Act 1927 did not improve the UK’s international distribution, rather, it unexpectedly resulted in the production of Quota Quickies. While the Act contributed to the development of British transnational cinema to some extent, the Quota Quickies were hardly regarded as the co-productions between the UK and the US, as they were not on the basis of equality and mutual benefit between two countries.

Until the 1940s, various post-war developments ensured that American production in the UK, often in collaboration with British companies, became relatively attractive. However, in 1947, “the British Treasury imposed a substantial tax on film imports, to conserve dollars for the purchase of essential goods from abroad. In response, the American film industry stopped exporting its product to Britain, and the US Embassy began lobbying vigorously against the tax.” (Colman, 2009). The 1948 Anglo-American Film Agreement allowed Hollywood films to be shown in British cinemas again, as the Board of Trade imposed a ceiling on American film companies’ earnings, part of which could not be converted into dollars and removed from the UK. The Eady Levy, which was introduced in the 1950s, resulted in an influx of American filmmakers to the UK. The shared language also made co-production with the US more attractive than co-production with European countries. Thus, “the process of producing films through British subsidiary companies soon exposed

additional benefits and Hollywood companies remained in Britain. More run-away productions were based in Britain between 1949 and 1957 than in the rest of Europe combined.” (Stubbs, 2009, p. 3).

The co-production relationship between the UK and the US underwent a transition during the 1960s. As Duncan Petrie (2016) argues, “while cinema attendances continued their steady decline, film production not only remained relatively buoyant but, perhaps more astonishingly, the profile of British cinema achieved unprecedented new heights.” (p. 549). Petrie (2016) also points out,

Much of [British cinema’s] achievement was underwritten by American finance and while the Hollywood majors were actively encouraged by the industry and the government, the increasing dependence of British producers on foreign investment also generated concerns about the sustainability of the 60s boom. (p. 549).

This trend was epitomised by the James Bond franchise. The first Bond film, financed by United Artists, was produced in 1962. The Bond franchise was a significant success at the box office and James Bond became an iconic, decade-defining British figure who encapsulated the UK’s cultural trademarks alongside typical Hollywood storytelling, and the outcome was well received by the global audience. The Bond franchise thus became a successful cooperation model between USA and UK, and the model may also have influenced the tax relief policy and the design of the Cultural Test in the 2000s, which I shall further discuss in the later section 3.6 and Chapter 4.

3.4.3 The co-production practice between the UK and Australia

In addition to the UK’s international strategy with respect to European countries and the USA, the UK’s efforts to promote overseas distribution have also targeted Australia, and the UK-Australia co-production is the third type of UK film industry’s international cooperation in the history.

The UK’s interest in Empire and Commonwealth countries began in the 1920s. Australia, in particular, as a member of the Commonwealth, shares the same language, a similar culture and a history that is intertwined with that of the UK. Consequently, British distribution companies were established in Australia from the 1920s onwards with the aim of exporting more British films

to Australia. According to *The Bioscope* (1927),

We are prepared to spend money to boom British pictures throughout Australia,” said Gerald Malvern, manager for Great the Empire Film Exchange Company (Australia) Proprietary, Ltd ... He left England eighteen months ago for Australia to consider possibilities for production. He found that no British films were being shown in the cinemas here.

Furthermore, *The Bioscope* (1927) reported that “the Quota Bill recently passed by Victoria, which stipulates that 2000 feet of British film must be shown in every programme, will probably extend to the whole of Australia.” (Unknown, 1927).

This Bill aimed to create a demand for British films in Australia. In effect, *Kinematography Weekly* (1935) noted that “during the past years Australians have been seeing an increasing number of British films. but [the UK producers] have hardly begun yet to compete on level terms with our overseas competitors.” Thus, because Australia was regarded as the part of British Empire in the 1930s, it was nonetheless recognised as an important market for UK film distribution. As *Kinematography Weekly* (1935) quoted from Arthur Dent,

Our English language and culture is the inheritance of many generations, and it is unthinkable that it should be lost to the screen through the possible dominance of any one country in the picture world. We are certainly proud of the ideals that tie the great dominions to the Mother Country.

In this respect, the UK’s strategy was largely focused on distributing and exhibiting British films in Australia from the 1920s to the 1950s. For instance, in 1946, “an important agreement which [would] result in more British films being shown in Australia and New Zealand [was] made between Sir Alexander Korda and distributing and exhibiting interests in the two countries.” (Unknown, 1946). In addition, in the 1950s, *Kinematograph Weekly* (1955) claimed that “British films in Australia can now gross at their best as much as any film of any country at its best. This is achievement.”

As Chibnall (Chibnall, 2013) notes, in the 1950s, British filmmakers in Europe were increasingly attracted by the opportunities in Commonwealth countries. However, it was not until the 1960s that co-production between

the UK and Australia began to flourish in earnest during the 1960s, with *The Stage* (1960) reporting that,

The Australian Broadcasting Commission (A-B-C) have discussed with at least two commercial TV contractors in Britain the possibility of co-producing a series of television films in Australia.

The Stage (1960) also noted that “Because of climatic conditions and the improved studio facilities available in Australia, international TV production companies are showing an increased interest in location series here.” Co-production between the UK and Australia in this period represented relatively spontaneous activity, as the UK film industry sought to improve the quality of production and therefore to expand its international distribution. In the case of the TV film series, “most of the financial backing for any new series by [ABC TV] company will come from British sources who are keeping a watchful eye on the likelihood of selling such material to the American networks.” (Masidlover & Stanley, 1960).

Australia thus became an active co-production partner with the UK film industry. At this stage, the arrangements were informal, and it was not until much later that official government-level arrangements were put in place. According to Screen Australia (2020), the first official Australia-UK co-production, telemovie *The First Kangaroos*, was made with the UK in 1986 under a one-off Memorandum Of Understanding (MOU) ahead of the signing of the [co-production] treaty in 1990. In the contemporary era, the UK has been Australia’s second most active co-production partner, after Canada. By the end of November 2020, “51 official Australia/UK co-productions have been made, with combined budgets totalling \$584 million. Features have been the foundation of Australia/UK co-production activity, making up around 50 per cent of all projects.” (Screen Australia, 2020). I shall return to the contemporary Australia-UK co-production story in Chapter 5.

By examining the historical development of the UK’s international ambitions, it is clear that international distribution has been an long-standing goal for British producers. History has demonstrated that film co-production has been one of the most effective strategies with respect to maximising the UK’s interests, as co-production fulfils both economic and socio-cultural purposes. Co-production can boost UK productions’ box office takings and help promote British film culture overseas by reaching further international audiences.

The USA, European countries and the Commonwealth have thus accumulated a long history of co-production with the UK film industry. However, approaches to cooperation between the UK and these nations have differed. First, the USA has been both a competitor of and an investor in the UK film industry. The UK's strategy and policy as regards the USA also shifted from a policy of eliminating American films to encouraging American inward investment. Second, European countries have the longest history of official co-productions with the UK. The UK and other European countries also share similar cultures and the same goal of resisting the domination of American films; however, co-production efforts between the UK and other European countries have not been particularly active. Third, Commonwealth countries, such as Australia, had, since the 1920s, been essential territories for the distribution and exhibition of British films. As the British Empire's political advantages waned, equal and bilateral cooperation became increasingly valued by both the UK and the Commonwealth countries. I will return to the co-production policy and practice in the contemporary period in chapter 5.

3.5 From the culture industry to the creative industries

In order to explain where the idea of 'creative industries' comes from, and how it has become central to contemporary UK film policy development, I shall examine its historical provenance and the development.

In the early stage of film history, ideas about film as a cultural practice were closely related to the intellectual and moral concerns about the educational and artistic potential of film. For instance, when the British Film Institute (BFI) was born in 1933, its goal was to "provide a source of information on filmmaking and the cinema, to begin a national repository of films, and to undertake the certification of films as cultural or educational on behalf of the government. It would also be a research body, acting as a mediator between teachers and the film industry." (BFI, 2013a). In this sense, the BFI and its measures were designed to support film as an educational and cultural tool.

At this stage, cultural policy was designed for cultural activities, encouraging activities involved with the arts and creative sectors, including filmmaking. The interest in the cultural aspects of film and the other arts was distinct

from their economic interests; moreover, economic goals were seen in many ways as the enemy of culture. In an influential study, Theodor Adorno and Max Horkheimer (1944) relentlessly criticised what they called the ‘culture industry’,

Movies and radio need no longer pretend to be art. The truth that they are just business is made into an ideology in order to justify the rubbish they deliberately produce. They call themselves industries; and when their directors’ incomes are published, any doubt about the social utility of the finished products is removed.

Adorno and Horkheimer regarded many forms of popular culture as parts of a single culture industry, the purpose of which, they argued, was to ensure market interests, and they considered mass-produced culture as dangerous to creativity and the arts. Despite their critics, Adorno and Horkheimer’s recognition of film as part of the culture industry helped to underline the economic nature of that industry.

Nicholas Garnham (2005) notes that, more recently, in the 1980s, a new concept of ‘cultural industries’ emerged, and was harnessd in some policymaking circles. He also argues that “attention was shifted from the overt content of culture to its forms, and from the cultural product to the relationship between cultural producers and consumers.” (p. 17). Garnham maintains that the term ‘cultural industries’ did not now indicate a simple replay of Adorno and Horkheimer’s analysis, “In fact the revived usage of the term “cultural industries” covered a crucial theoretical disagreement, and thus also policy disagreements.” (Garnham, 2005, p. 18).

To distinguish the differences between ‘culture industry’ and ‘cultural industries’, it is clear that Adorno and Horkheimer were very critical of the economic emphasis of the so-called culture industry, whereas the cultural industries approach saw more positive value to cultural products, as they are able to contribute to economic regeneration and growth, to create jobs, and therefore to have a wide impact on society and the economy. What was central to the cultural industries approach is something that was equally central to the work of Adorno and Horkheimer, namely that the cultural industries emerged in a capitalistic society with an emphasis on the global market. Further, Leva Moore (2014) points out that “The cultural industries approach provides an explanation of concentration and integration [of ownership], which are features of capitalist production – including media production.” (p. 741).

Meanwhile, distinct from the culture industry approach, the attitudes of some scholars and subsequently policymakers towards the potential benefits of the cultural industries have changed dramatically. Thus a research paper on The Cultural Industries Sector, published in 1997, argues that “the cultural industries may now be considered to be making a substantial contribution to the economic well-being of nation states.” (Pratt, 1997, p. 7).

While the cultural industries contributed to the national economy, they had also emerged at the regional level. In the mid-1980s, the removal of government subsidies and the development of cultural industries resulted in investment in local cultural sectors, to some extent, and the regional cultural industries have been regenerated and reformed by local enterprises and governments since then. David Throsby (2008) therefore points out that “the cultural industries in the broadest sense have been seen as part of a package capable of revitalising depressed urban areas and stimulating regional growth.” (p. 229). However, regional economic disparities and the decline of the government’s cultural subsidies resulted in further disparities in the cultural industries in the 1980s.

In the late 1990s, the some in the cultural administration, and especially policymakers associated with the New Labour government, started using the term “creative industries” instead of “cultural industries”. The adoption of this terminology represented a huge promotion of the economic importance of the cultural sector by policy discourse. The creative industries were defined in the Labour Government’s 2001 *Creative Industries Mapping Document* as “those industries 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”. (UK Government, 2021b). Those industries included advertising, architecture, the art and antiques market, crafts, design, designer fashion, film and video, interactive leisure software, music, the performing arts, publishing, software and computer services, television and radio. Garnham (2005) explains that “the term “creative” was chosen so that the whole of the computer software sector could be included. Only on this basis was it possible to make the claims about size and growth stand up.” (p. 26). In this context, the creative industries promote sociocultural activities that obtain economic values, with a strong focus on cultural activities and a creative workforce.

Meanwhile, the New Labour government’s promotion of creative industries

further highlighted the significance of regional development. Mark Jayne (2005) notes that “during 1999, the Creative Industries Task Force set up a Regional Issues Working Group (RIWG) that undertook a series of workshops in order to translate the national creative industries agenda for regional audiences.” (p. 542). At the same time, the Regional Development Agencies (RDAs) were also established in 1999, “the RDAs are focused on promoting long term sustainable growth and the impact of many of the actions they take will be in the medium term and beyond. They also respond flexibly and effectively to both immediate and longer-term economic issues in their regions.” (House of Commons Business & Enterprise Select Committee, 2008).

To some extent, the transition from Adorno and Horkheimer’s concept of the culture industry to the Labour policymaking concept of the creative industries has parallels to Hill’s description of a shift from protectionism to market-friendly initiatives. Protectionist policies were to some extent about protecting British films, and British culture more generally, from Hollywood, conceived as a machine for mass-producing a foreign culture. In the creative industries phase, however, inward investment is encouraged for the way it contributes to economic growth, and in the end, government policy aims to create a friendly market in the UK for global investors. From this perspective, the creative industries have added value to the creative economy at national and regional levels, while they have also strengthening the domestic film industry, in terms of talent, culture and opportunities.

It is also worth noting that the terminology relating to the so-called creative industries is variable, and the changes in terminology may result from the emergence of new media and innovative industries. For example, the BFI has been using the term ‘screen industries’ in recent years, a new term which I shall discuss further in Chapter 6.

3.6 The UK Film Council

As the UKFC was in effect set up to roll out film policy within the framework of the creative industries, its policymaking also shared the characteristics with the creative industries approach. In this section, I intend to focus on several key economic and socio-cultural policies developed in the UKFC decade, and examine what long-lasting impacts they have on the contemporary film policies.

The UK Film Council (UKFC) was a non-departmental public body set up in 2000, it was constituted as a private company and owned by the Culture, Media and Sport (DCMS), to develop and promote the film industry in the UK. The new funding body “absorbed the other public and semi-public bodies concerned with film, namely the Arts Council of England’s Lottery Film Department, the BFI’s Production Production Department as well as its regional funding role, British Screen Finance and the British Film Commission.” (Doyle et al., 2015, p. 46). This suggested that the Film Council took comprehensive responsibilities to support the film industry. However, the UKFC was unexpectedly abolished in 2010, becoming “one of the highest profile quangos to be axed by the coalition government.” (Brown & Kennedy, 2010). I shall discuss the reasons for the abolition of the UKFC and the transition to the British Film Council (BFI) in Chapter 4.

There is no denying that the UKFC created the initial framework for contemporary film policymaking, which affected the film industry from both economic and socio-cultural perspectives. Economically, tax relief and the introduction of the Cultural Test attracted significant inward investment, while National Lottery funding was used to set up various funds to support film production, distribution and exhibition. According to *The Guardian* (2010),

Since it was created by Labour in 2000, the UKFC, with 75 staff, has been responsible for handing out more than £160m of lottery money to over 900 films. Successes range from *Bend it Like Beckham* to *Gosford Park* to *Fish Tank* with the occasional dud – notably *Sex Lives of the Potato Men* – along the way.

In addition to this, in a bitter-sweet ending for the UKFC, in 2010 there was “the phenomenal commercial and critical success of *The King’s Speech* – which won Oscar and BAFTA awards for Best Film and has now become the highest grossing UK independent film of all time at the UK box office.” (UKFC, 2011b). The success of this award-winning film was largely the result of the UKFC, which invested £1m of lottery money into the film’s early development. In this respect, the UKFC effectively supported UK independent films.

From a socio-cultural perspective, the UKFC also made unprecedented contributions in various areas, including support to the nations and regions, diversity and inclusion and education and training, as well as partly funding the BFI, to support its cultural and educational objectives

Gillian Doyle et.al (2015) have already provided a comprehensive analysis of the UKFC's rise and fall, while *Screendaily* (2020) also examined the UKFC's achievements, missteps and enduring impact ten years on from its demise in 2010. I will not therefore explore the chronological development of the UKFC, rather, I shall focus on a few essential policies that emerged during the UKFC's decade, as they were innovative and had impacts on today's policies. In particular, I look at the tax relief policy and the Cultural Test, as they are the most significant government policies shaping the landscape of the contemporary film industry. In addition, I discuss the UKFC's regional policy and its contribution to diversity policymaking, achievements which became the stepping stones for the BFI in the following decade.

3.6.1 Tax relief policy and the Cultural Test

The UKFC, established in 2000, was regarded as being “particularly successful in encouraging inward investment in the form of large-budget productions backed by US studios that qualified for UK tax breaks.” (Doyle et al., 2015, p. 145).

As discussed in the previous section, UK governments have a long history of seeking to attract inward investment and tax relief policy was introduced in the 1990s as a market-friendly approach. The new tax relief policy, which was announced in 2007, reflected the change in the government's priorities towards the film industry and foreshadow certain challenges faced by the film industry nowadays. When the new tax relief policy was applied, the Cultural Test was introduced by the DCMS and administered by the UKFC, to identify those films that might qualify as British and therefore benefit from tax relief. The Cultural Test, as the name indicates, placed a greater emphasis on cultural factors, including cultural content and cultural contribution, than earlier means of defining which films qualify as British for policy purposes. Despite their names, the equivalent focus on cultural hubs and cultural practitioners was just a new way of describing the location of production and the nationality of those involved in the production process.

Distinctive from the government's previous economic policies, the Cultural Test was an unprecedented measure, and instead of urging the exhibitors to show ‘British films’ as per the 1927 quota legislation, the Cultural Test encouraged filmmakers to produce British content and use British crews. However, the Cultural Test, which highlighted the cultural significance of film produc-

tion, was not really intended to promote film as a cultural product and was instead designed as a complementary criterion for administering the tax relief policy.

Combining culture and tax was not entirely an innovative approach, rather, it was a compromise. On the one hand, the government prioritised attracting US inward investment. On the other hand, as Magor and Schlesinger (2009) note that “the UK as part of the EU had to adhere to the Commission’s rules regarding state aid for film.” (p. 315) and the EU Commission required that State support for film must have a firm cultural basis.

The Cultural Test became a certificate of access to tax relief in this context, and while it clearly offered support to UK filmmakers, it was also designed to benefit international investors. British filmmakers were expected to achieve 16 points by meeting all the requirements under Cultural Content and therefore pass the Cultural Test. Meanwhile, the international investors were likely to accumulate points from different categories of the Cultural Test, and it is interesting to note that this was rather an ambiguous implication of Cultural Contribution, as this section required film to represent or reflect a diverse British culture, British heritage or British creativity. John Hill points out that ‘indigenous’ British films are unlikely to need the points while inward investment films would be unlikely to achieve points under this category. (Hill, 2016, p. 715). In this respect, the DCMS, as the body administering of the Cultural Test 2007, was responsible for deciding whether an inward investment film could achieve these points, and this offered a certain amount of flexibility for Hollywood films to be regarded as ‘British’, this ambiguity also showed the government’s intention to qualify those Hollywood productions that had potential to invest in the UK. Hill thus argues,

While the largest number of films passing the Cultural Test would generally be perceived to be in some way ‘British’, the Cultural Test has remained of sufficient flexibility to permit Hollywood films that might not immediately be recognised as British – such as the Batman films - to pass the Test and gain access to tax reliefs. (Hill, 2016, p. 715)

Thus, by the time the Cultural Test was introduced, there had been further changes in the government’s strategy for gaining inward investment, and the government was not only focused on attracting big budget Hollywood productions, but also intended to stimulate the UK film economy more generally,

including the production and effects sectors.

3.6.2 Nations and regions in the UKFC's era

The UKFC also developed a strong policy for encouraging the growth of the film industry in the nations and regions. Replacing the RDAs, the Regional Screen Agencies (RSAs) were formed after 2002 to promote creative screen industries at a regional level. The UKFC set up nine Regional Screen Agencies, one in each of the regions of England, including Screen East, EM Media, Film London, Northern Film and Media, Vision+Media, Screen South, South West Screen, Screen West Midlands and Screen Yorkshire. As a socio-cultural strategy to develop the nations and regions, the nations and regions strategy was also expected to stand in line with the New Labour government's economic goals for the creative economy.

First, they were intended to contribute to a sustainable regional film industry in the Film Council's framework. The Film Council's first public statement clearly stated that one of their goals was to "promote film activity in the nations and ensure that national and regional bodies work in concert to contribute towards the UK Film Council's goal." (UKFC, 2000). As Alan Parker, the Chairman of the Film Council, claimed that "We've put down deep roots in each English region by co-financing the new development agencies." (Parker, 2002). *Oxford Economics* (2010) further noted,

The UK Film Council has invested almost £8 million a year into regional film activities through the Regional Investment Fund for England (RIFE) which supports the nine Regional Screen Agencies in England providing a variety of resources aimed at developing public access to, and education about, film and the moving image. There are also national screen agencies for Scotland, Wales and Northern Ireland.

Thus, the RSAs received part of their funding from the Film Council, and in investing in local film productions and supporting film activities, created more job opportunities and prepared the talents of the future, thus helping to fulfil the potential of local filmmakers.

The second goal of the RSAs was to attract inward investment to productions made in the regions. Here, inward investment can be divided into two aspects. On the one hand, it indicated inward investment to film productions,

and RSAs often focused on promoting their regions as locations for international productions. For example, it was documented that “during 2004/2005 the RSAs worked with 3,300 companies and responded to 13,000 location enquiries.” (Holden, 2006, p. 50). On the other hand, the RSAs was able to generate a great inward investment, using the funding from the UKFC to attract funding from other sources,

During 2004/5 the RSAs levered £13.5m worth of investment, almost double the £7.8m of investment they received from the UK Film Council. This was secured from diverse sources including the European Union, Regional Development Agencies, Learning and Skills Councils and Local Authorities. Overall, the total budget of the RSAs in 2004/2005 was £21,304,622. (Holden, 2006, p. 49).

John Holden (2006) argues that “The RSAs add both economic and public value. One of the RSAs’ most significant activities is nurturing talent and developing sustainable infrastructures and networks to underpin that economic development. Another is accessing investment flows from the public and private sectors, from venture capital to EU funding programmes”. (p. 3). Thus, as Holden demonstrates, the establishment of RSAs and the film strategy of the nations and regions was supposed to achieve both economic and socio-cultural goals. On the one hand, the RSAs contributed to the growth of the creative economy with inward investment and funding; on the other hand, they invested in regional film productions and increased local employment.

However, it could be argued that although regional film production was economically valuable, regional film policy during the New Labour period neglected the economic divergence among different regions. Encouraging the RSAs to attract inward investment and develop film productions certainly contributed to the UKFC’s goals, but it may have widened the gaps between regions and thus deprived regional economies to some extent. Meanwhile, according to Jack Newsinger, the RSAs paid little attention to nurturing local cultural and improving equality and diversity in regional film production. As Newsinger (2017) puts it, “there is little sense of a corresponding development of a cultural politics of regionality. Questions of identity, politics, diversity and so on are notable in their relative absence from the discourses surrounding regional film.” (p. 374).

Therefore, while the film productions in the nations and regions were increasingly valued in the UKFC’s decade, they shared the same goal as the

creative industries nationally, to contribute to the UK economy. To some extent, the establishment of RSAs has shaped contemporary regional policy. While the RSAs failed sufficiently to prioritise film culture or diversity agenda judged by today's standards, they successfully invested in local talent and local workforces. I shall further discuss how UKFC promoted diversity and inclusion in the film industry in the next section.

3.6.3 The UKFC's diversity agenda

As early as 2003, Films Minister Estelle Morris claimed that "Art holds up a mirror to reality... the film industry should fully reflect the rich diversity of our culture, both in front of and behind the camera. It must be open to every section of society." (Minns, 2003). As Clive James Nwonka (2015) argues, "This diversity agenda, emerging in the aftermath of the Macpherson Report, allowed New Labour to cultivate a modernised British identity via an emphasis on social cohesion and equality of opportunity." (p. 73).

The culmination of the overarching policy framework signalled by Morris was the Equality Act 2010, which enshrined many of the principles being developed over the previous decade, in the film industry and elsewhere. The Act primarily defined a series of protected social characteristics and provided the legal framework to tackle disadvantage and discrimination. The protected characteristics include age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation. The agenda of diversity and inclusion developed by the UKFC for the film industry was thus been set in a wider socio-cultural context, while the BFI's policies are based on the framework of the Equality Act 2010. This Act was one of the last important measures introduced by the Labour government, before it was defeated at the May 2010 election, and the Act became the Labour government's legacy that has been enshrined in and has influenced the film industry subsequently.

UK film policy makers have been pioneers on the global stage in promoting diversity and inclusion, and not only has the government encouraged cultural diversity through the Cultural Test, but the UKFC and the BFI have also produced different strategies, aiming to increase diversity and inclusion in the UK screen industry. As Andrew Higson argues, "complexity and imprecision is the product of the diversity of indigenous English and broader British cultural traditions and identities and the marked social and cultural

changes that have taken place since the Second World War; but it is also the product of industrial development, market aspirations and government policy.” (Higson, 2011, p. 5). This demonstrates that diversity and inclusion is a complex socio-cultural topic that also has economic implications.

During the 2000s, the UKFC has promoted diversity and inclusion through both economic and socio-cultural measures. The UKFC’s economic support for diversity and inclusion initiatives was mainly through its New Cinema Fund, which was allocated £5 million a year to support new talent and encourage innovative film-making through the use of digital technology for low-budget features and short films. It was strongly committed to supporting work from the regions and from black, Asian and other ethnic minorities. (Kelly, 2016, p.665).

It is also worth noting that the UKFC also had a Premiere Fund focusing on supporting big budget, commercial films, while the New Cinema Fund targeted small budget, independent films on diverse subjects. One could argue that this indicated that films of diverse subjects were regarded as less commercial and were unable to receive the Premiere Fund. However, Sally Caplan, head of UKFC Premiere Fund, 2005-2010, maintains that “it was a good thing to have both the New Cinema Fund, focusing on newer talent, and the Premiere Fund looking after ostensibly more commercial, bigger-budget projects. There was some fluidity between the two funds, which was good, and both funds were trying to promote gender equality and diversity and inclusion.” (Gant, 2020). Paul Moody (2017) notes,

While the Development Fund executive appeared to have identified barriers inherent in the UKFC’s funding structure, the Premiere Fund executive offered a slightly different interpretation, arguing that ‘most films focusing on minority subjects tended to be sent [to the New Cinema Fund] as they tended to be smaller scale ... It wasn’t designed that way, they just naturally fell into that bracket’. (p. 413).

He further argues that “the evidence above suggests that at the UKFC’s inception, both minority ethnic and female writers were deliberately composing scripts for lower budgets and on smaller scales, targeting the New Cinema Fund based on the perception that their work would not merit the definition of a ‘commercial’ film.” (Moody, 2017, p. 413).

In this respect, even though the UKFC aimed to encourage diversity and inclusion on screen, few films funded by the New Cinema Fund were regarded as major commercial successes. On the one hand, Arit Eminue, UKFC development coordinator, 2004-2005, notes “Paul [Trijbits, head of UKFC New Cinema Fund, 2000-2006] certainly wanted to improve diversity amongst the New Cinema Fund applications. Noel Clarke and Menhaj Huda came through with *Kidulthood* at that time. Esther Douglas and Ken Williams came through with *Life And Lyrics*, and Amma Asante with *A Way Of Life*. But there were also challenges. There were people who didn’t feel that their voices were represented in the slate of films that were developed or produced by any of the funds.” (Gant, 2020). On the other hand, Moody argues that (2017) “although these risks were deemed to be outweighed by the benefits of investing in them... to this day they represent the most consistent and sustained attempt by a UK funding body to produce commercially oriented British films about minority ethnic characters.” (p. 414).

The arguments above demonstrate the dilemma that the UKFC faced, as it promoted diversity and inclusion on screen through economic subsidies. First, if the quality of the subsidized films produced was not of a sufficient standard, they could raise the questions of equality and further damage the reputation of these applications. Second, the discrimination that is rooted in histories of racism and sexism could affect the filmmakers’ skills and ambitions to pursue certain genres in storytelling. For instance, female filmmakers could be regarded less likely to write or direct large budget, sci-fi films. As a result, the existing stereotypes could discourage minority ethnic and female writers from breaking through. Although UKFC’s New Cinema Fund helped a few films achieve great commercial success on screen, Nwonka and Malik argue that it was of a greater socio-cultural significance off screen, as it represented the emergence of an ‘institutional diversity’ agenda. (Nwonka & Malik, 2018, p. 1111). Nwonka and Sarita Malik (2018) suggest that “the New Cinema Fund’s ‘institutional diversity’ agenda represented a symbolic effort by both the UKFC and UK public service broadcasters to redevelop black British film vis-a-vis a plethora of cultural imperatives oriented around the notion of ‘social inclusion’.” (p. 1111).

The fund that aimed to increase diversity on screen did indeed encourage Black and Minority Ethnic (BAME) filmmakers and talents off screen. The UKFC also contributed to institutional diversity by appointing Marcia

Williams as its first Head of Diversity, and one of the notable innovations of Williams' tenure was the creation of the Breakthrough Brits strand in 2005. Conceived to showcase UK talent in the US, the strand spotlighted BAME talent in both 2008 and 2009. (Gant, 2020). Mary FitzPatrick, UK Film Council head of diversity, 2010-2011, thus claimed the fact that "the UK Film Council had a head of diversity sent a very strong message to the industry itself that it really mattered" (Gant, 2020).

Therefore, the UKFC's strategy toward diversity and inclusion focused on providing economic subsidies to encourage greater participation of diverse communities in the UK's film industry, and the emerging filmmakers were expected to create a more diverse culture on screen. However, the specialised funding failed to radically stimulate the increase of diverse content, not only because few subsidised films achieved commercial success, but also, it required further training and education to involve the BAME groups in the industry. While the UKFC initially made a symbolic effort, the effects may take a long time to show. I will further discuss the BFI's diversity policy in Chapter 4, to demonstrate that the BFI is building on the UKFC's work and legacy in relation to diversity and inclusion.

3.7 Conclusion

This chapter has looked at the key film policies and organisations developed across the history of the UK film industry, up to 2010. It has demonstrated that policymaking has been complicated by various factors including modern British history, industrial development, the shift of governments and approaches to policy, and especially economic policy, and the overwhelming Hollywood dominance of British cinema.

The Cinematograph Act 1909 was the first attempt of government intervention in the film industry. While the 1909 Act was intended to create a safe environment for cinema-going, it unexpectedly led to both economic and socio-cultural results. While its socio-cultural impact has been widely recognised, as "the beginning of that stealthy form of ruling class vigilance over a popular cultural form felt to require unique and extra controls –such as local council approval over exhibition" (Dave, 2016, p. 187), I point out that the Act also encouraged investment in modern cinemas and contributed to the cinema boom in the UK.

Based on the long-lasting influence of the first legislation, I note that socio-cultural policies are often affected by the currents of political and ideological pressure. For instance, the BBFC, as a moral gatekeeper, has attempted to censor certain types of films in different periods. But while it restricted certain content on screen, the BBFC has also to some extent protected the diversity of film culture from censorship by local or central government authorities. The film culture was also shaped by the evolution of cinema-going experience, as screening venues developed from unsafe music halls to multiplex cinemas and the current online streaming experience over the last hundred years. The changes in film venues not only affected the audiences' viewing experience and the form of films, but also have impacts on the supervision of different screens. By looking at the development of socio-cultural policies for cinema, we can also see that the government has not sought to intervene heavily in the exhibition sector and has instead focused its policies on supporting film production.

Meanwhile, economic policymaking for the film industry has often been designed to align with the UK's broader economic strategy and trade policy at different periods, aiming to support the UK film production sector as well as trade in general. In recent years, the economic impacts of the UK film industry have been more carefully calculated as part of the creative economy. Based on Hill's typology, I argue that the film policymaking has been mutable and has economic and socio-cultural characteristics. The first film legislation had explicit socio-cultural intention and unexpected economic and socio-cultural results, the protectionist phase of policy that began in the 1920s possessed explicit economic motivations and generated substantial socio-cultural effects by amplifying the presence of British elements on screen. Even though economic policies could achieve cultural effects, such as the quota legislation contributing to the development of an indigenous UK film culture, the narrative of policymaking was rather driven by economic considerations. Subsequently, in the second phase of government intervention, the policymaking had explicit economic expression and certain cultural concerns, demonstrated by the creation of the Eady Levy and the NFFC, the interventionist policy was "spurred on by cultural fears of the Americanisation of Britain and of Hollywood's corporate dominance." (Fenwick, 2017, p. 211). Finally, a new market-friendly phase started when the policy concept of the creative industries emerged, and their economic values were recognised by the government.

Notably, in the UKFC period, the government's interventions and the UKFC's strategy had explicit cultural purposes and obtained stronger economic purposes than ever before. This phenomenon also indicated that the contradiction between culture and economy has in some ways been resolved at the level of policymaking. Thus, with cultural elements being emphasised in the nations and regions, as well as tax incentives attracting inward investment, the policies in action in the 2000s can be seen to have stimulated the economy and promoted British culture on screen. The UKFC was also a pioneer in recognising the significance of equality and diversity in the film industry, and encouraged diversity and inclusion through economic measures, paving the way for further development of diversity policy in the BFI's era.

To summarise, the shifts in policymaking across the century from the 1909 Act to the end of the UKFC period demonstrate that different governments with different political complexions have held different opinions towards official interventions in the film industry. More left-wing, social-democratic governments have generally looked to subsidise culture and film, while Conservative governments often adopt liberal economic policies and seek to place the film industry in a free-market setting. Nevertheless, learning from history, it has been widely recognised that protecting film culture and stimulating the economy should not be seen as mutually exclusive. That was how the 1997 Labour government conceived creative industries policy, a policy that continues under the current Conservative government. Thus, attracting inward investment to promote UK film culture is the government strategy at the current stage. This further illustrates the blurred distinctions between economic and socio-cultural policymaking in the context of creative industries.

As the UKFC was abolished in 2010, the new strategies that were developed in the BFI era under the Conservative government will be further discussed in the next chapter.

Chapter 4

Contemporary UK film policy: from 2010 to the present

The UK society, its film industry and policy making have experienced great changes since 2010; on the one hand, these changes are rooted in historical context, on the other hand, they have impacted the industry in an unprecedented way. As Adrian Wootton (2021), chief executive of the British Film Commission and Film London, said: “We have embarked on a new golden age for film and TV, one that provides unrivalled opportunities for our industry, our economy and our communities to stimulate long-term job creation and prosperity for the whole of UK.” There is no denying that the industry has entered a new age, however, whether the UK film and TV industry has embraced a “new golden age” shall be questioned and discussed in this chapter.

This chapter discusses contemporary UK film policy since 2010. As the Conservative-led Coalition Government replaced the Labour Government in 2010, in a government decision, the UK Film Council (UKFC) was abolished in the same year, and the British Film institute (BFI) outmanoeuvred the UKFC, taking over as the UK’s lead organisation for film and the moving image. The new role of the BFI since 2010 has not only resulted in the merging of cultural and economic film institutions, but also represents the unity of economic and cultural policies.

I shall first examine the government’s film policy making in the contemporary era, focusing in particular on tax relief policy, as it has been the most

significant government film policy shaping the UK film and TV industry since it was introduced. While it has contributed to the prosperity of the UK film and TV industry to a great extent, it also led to certain problems at the current stage. Second, I discuss the merging of economic and cultural policy under the BFI, and examine how the BFI transformed itself to become an effective lead agency for the film industry after the UKFC was abolished. Third, I discuss BFI film policy and strategy in the period since 2010. The BFI is now an important body and, by analysing the BFI's strategic reports between 2012 and 2022, I will explore the development of the organisation and its strategies towards the industry.

In the last section, I acknowledge that, apart from the BFI's economic measures, the emerging socio-cultural challenges in the UK film and TV industry, such as diversity and inclusion under the influence of the Black Lives Matter and #MeToo movements, and much else besides, also urged the BFI to create new standards for a more equal and accessible environment. The BFI Diversity Standards, which were launched in 2016, have been the BFI's most important socio-cultural policy, and it is necessary to examine the diversity rules and their effects

4.1 Government film policy in the contemporary era

Before discussing the BFI's development since 2010, I shall first explore the government's film policy making in the contemporary era. In particular, I focus on the revised tax relief policy and Cultural Test in the BFI's era, as this has been the most crucial film policy that has significantly shaped the UK film and TV industry in the contemporary era, not least in terms of attracting inward investment in the UK film industry.

As we have seen in Chapter 3, tax relief and the Cultural Test had been an important strategy to attract inward investment and stimulate the UK film economy since 2007. When the Conservatives and Liberal Democrats formed a coalition government in 2010, they continued to support the tax relief policy. At the same time, the BFI replaced the UKFC as the lead agency for film and was placed in charge of cultural certification, administering the Cultural Test.

The fruit of the tax relief policy was also gradually showing in the BFI's era, with tax relief effectively attracting inward investment to the UK industry. For instance, before the revision of the tax relief in 2014, "The value of feature

film production spend in the UK reached £1.1 billion in 2013, 81% of which was associated with inward investment features.” (BFI, 2013b).

The government also presented the film tax relief as a successful case, noting that “since its introduction in January 2007, the film tax relief (FTR) has supported £5.5 billion of investment into 825 British films which have received approximately £800 million in relief.” (HMRC, 2013).

However, the policy particularly benefited the major American studios making films in the UK, as their large budget films could generate the most tax incentives. For instance, *The Guardian* (2014) reported, “The first analysis of accounts for the Disney movies made in the UK reveals that since the scheme was introduced in 2007 the company has benefited from HMRC to the tune of £167.6m. Last year the tax credits reached a high of £50.1m, believed to be the largest ever payment to a studio.” HM Revenue&Customs also noted in the summary of tax credit claims from 2006 to 2014, that

Total production expenditure by films claiming the relief was £7.8 billion, of which 72% was incurred in the UK, 250 claims, or 11%, were made by large-budget films (those with production budgets of £20m+), and 2,050 were made by limited-budget films. Tax credit payments to large-budget films totalled £850 million, and to limited-budget films, £420million. (HMRC, 2014)

The data indicated that a large-budget film could receive an average of £3.4 million tax relief, while a film with production budget less than £20 million could generate an average of £0.2 million.

Clearly, tax relief benefits large-budget inward investment films more than it benefits limited budget independent films. As Jack Newsinger and Steve Presence (2018) note, “tax relief is proportionate to production spend, levels of subsidy for big-budget films far exceed anything available to indigenous filmmakers, because the latter make films with considerably smaller budgets.” (p. 448). Newsinger and Presence further argue that

Tax relief which is by far the single largest source of public funding for film in the UK is indicative of the extent to which the film industry is valued in primarily commercial terms by the state. Rather than using public funds to mitigate market failure, tax relief transfers those funds to the private sector and thereby boosts the commercial operation of the industry by reducing the costs and

risks involved in private investment. ([Newsinger & Presence, 2018](#), p. 450).

This underlines the differences between interventionist economic policies, which seek to address market failure, and market-friendly policies, which benefit the biggest players in the market.

Nathan Townsend ([2021](#)) also demonstrates, in the wake of the 2007 tax relief, the total spending on inward-investment films rose sharply, but the numbers of inward-investment films did not dramatically change. In contrast, the total spending on domestic films changed only modestly. ([p. 29-30](#)). Therefore, as UK independent film production is still heavily reliant on public funding, while the US studios have substantially increased their investment in the UK film industry due to the tax incentives rewarded, the tax relief policy clearly has benefited US studios more than independent filmmakers. Additionally, as David Steele argues, the big US studios do not actually need a taxpayer subsidy,

They get it because the UK is embroiled in international competition for mobile film production, through which independent and non-coordinated tax jurisdictions -the individual US states, Canada, New Zealand, Australia,the UK, various European territories – contend to attract films to their countries. ([Steele, 2015](#), p. 74).

The other side of this story is that, because the US studios have substantially increased their investment in the UK film industry due to the tax incentives rewarded, they have also helped create more jobs in the UK film industry.

In 2013, the coalition government continued to support the tax relief policy and further applied tax relief to animation, high-end television and video games production in 2013. This was a turning point in which the boundaries between film production and High-end TV (HETV) production were significantly diminished. Fuelled by the growth of streaming platforms, HETV with film-scale production values commanded large audiences globally. The rise of drama series, such as *Game of Thrones*(2011) and *House of Cards*(2013) demonstrated that HETV productions share similar budgets, production scale and quality as film productions. The tax relief policy stimulated the shooting of such large HETV productions in the UK. In *The location guide*'s report ([2013](#)), Moyra Lock of Northern Ireland Screen stated, “We brought in

Game of Thrones before the TV tax credit – now that we have it, it’s of great benefit of course”. The press(2013) also commented, “The UK government’s decision to launch a TV tax credit in early 2013 after a lengthy industry consultancy shows how seriously television is considered in terms of its economic impact.”

Meanwhile, the economic value of the high-end TV industry has been increasing, according to *Screendaily* (2020b),

The amount paid out in UK high-end television tax relief (HETVF) is catching up with film tax relief (FTR)... FTR still accounts for almost half of all the Creative Industries tax reliefs (£1.11bn) paid out in 2019-20 (down from 59% of the 2018-19 total), whilst High-end Television Tax Relief (HETVF) is now almost 30%, up from 22% the previous year. Nonetheless, the amount of FTR paid out has still risen by more than 50% in the past five years.

The extended tax relief policy also contributed to the emerging concept of ‘screen industry’ in the following decade, which I shall further discuss in Chapter 6. Thus, the Video Games Tax Relief (VGTR) in August 2014 and the Children’s Television Tax Relief (CTR) in 2015. (BFI, 2018b).

The goal of the government was for the creative industries to achieve a positive economic impact, and tax relief policy proved to be very effective in boosting inward investment. Thus, tax relief policy was not only applied to a wider scope in the screen industry, but was also, strengthened to attract more international capital, in particular, large-budget film productions. In 2014, the government introduced changes to ‘modernise’ the existing film tax relief, the major change was to “apply at a rate of 25 per cent for the first £20 million of qualifying core expenditure, and 20 per cent to amounts thereafter, for all eligible film productions.” (HMRC, 2014). *Screendaily* (2014) commented, “The move will see an increased rate of relief for larger budget films...This means that producers of larger budget films will receive an increase of 5% on the first £20m - namely, an additional £1m of tax relief.” In addition, while tax relief was designed to attract inward investment, the revised tax relief also opened more gates for investors to access the tax incentives.

The Cultural Test was also modernised to align with the tax relief; comparing the Cultural Test 2007 with the Cultural Test 2014 (see Figure 4.1), the significant change is the increase in the points available for principal photography and using British VFX companies. The new version also allowed

	Cultural Test 2007		Cultural Test 2014	
Cultural content	Film set in the UK	4	Film set in the UK or EEA	4
	Lead characters British citizens or residents	4	Lead character British or EEA citizens or residents	4
	Film based on British subject or underlying material	4	Film based on British or EEA subject matter or underlying material	4
	In English language	4	In English or UK indigenous language or EEA language	6
Cultural contribution	Film represents a diverse British culture, British heritage or British creativity	4	The film demonstrates British creativity, British heritage and/or diversity	4
Cultural hubs	Studio and/or location shooting/ Visual Effects/ Special Effects	2	At least 50% of the principal photography or SFX takes place in the UK	2
	Music Recording /Audio Post Production /Picture Post Production	1	At least 50% of the VFX takes place in the UK	2
			An extra 2 points can be awarded if at least 80% of principal photography or VFX or SFX takes place in the UK	2
			Music recording/audio post-production/picture post-production	1
Cultural practitioners	Director, Scriptwriter, Producer, Composer, Lead Actors, Majority of Cast, Key Staff, Majority of Crew	8	Director, Scriptwriter, Producer, Composer, Lead Actors, Majority of Cast, Key Staff, Majority of Crew	8
Total Credits		31		35
Pass mark		16		18

Figure 4.1: UK Film Cultural Test

Source: British Film Certification Cultural Test Guidance Notes

filming in European locations with European stories, actors and languages—at this point, the UK was still a member of the European Union. In addition, filmmakers or production companies are required to achieve 18 points out of 35 to access tax relief, although the extra two points were not really designed to improve the threshold, because filmmakers or production companies could be awarded 6 credits, instead of 4, by recording the dialogue in English or European languages. However, the change offered more options and encouraged more engagement with post-productions.

In this respect, while tax relief was designed to attract inward investment, the revised tax relief opened more gates for investors to access the tax incentives. There is no denying that the revised Cultural Test could be beneficial

to some effects companies, and the *BBC News* (2013) reported, “Anna Mansi, the BFI’s head of certification, said opening up the test to more European content would have the biggest effect on the film industry. “This puts us on a level playing field with our creative content tests and other European culture tests...The increase in visual effects points will also be very beneficial to the effects industry”.”

It is also important to question whether the revised Cultural Test could benefit indigenous filmmakers in the long term. Newsinger and Presence (2018) point out that “In effect, the rules governing tax relief ensure only that Hollywood studios support the UK industry indirectly by forcing the studios to work with UK companies.” As a result, “the films that benefit the most from the system of tax reliefs are those which, due to their relationship with the Hollywood studios, commonly offer the most conventional signifiers of ‘cultural Britishness’ rather than those that are engaged in challenging and refashioning them.” (Hill, 2016, p. 179).

Indeed, while the tax relief policy significantly benefits the US studios, the failure to effectively benefit the UK independent film sector is glaring. First, as noted above, independent filmmakers are unable to receive large tax incentives due to the relatively low budget of the films they make. Second, the government’s need for inward investment has stimulated a boost of blockbusters shooting in the UK, and this has resulted in skills shortages in UK independent film productions. *The Guardian* (2014) noted,

Edgar Wright, the director of British movies *Hot Fuzz* and *The World’s End*, said: “While the tax break is good for Hollywood films shooting here, it’s probably not that great for British films shooting in the UK. Some middle-to-low-budget films are going to find themselves without crew because all the American films are shooting here.

Third, in the long term, the increase in US large-budget productions may threaten the development of the domestic film industry, and if indigenous filmmakers cannot be nurtured or achieve reasonable rewards, the UK film industry will face both socio-cultural and economic problems. Not only will British culture be less presented on screen, but also, the increase in production budgets and shortage of talent may make the UK less competitive among its rivals and eventually drive US studios away.

In conclusion, from the perspective of policymakers, the design of film tax relief “had two key and linked themes: investment in the film industry and concerns about tax avoidance” (Hansard, 2014). The change of tax relief policy in 2007 introduced the Cultural Test which aimed to prevent the use of tax avoidance further attract inward investment. The revision of tax relief policy in 2014 has further encouraged inward investment in production and post-production in the UK.

As David Gauke, the Financial Secretary to the Treasury, stressed, “as a Government we lend our support to those who want to invest in the industry.” (Hansard, 2014). The government and Treasury thus in effect aimed to use tax relief policy to rebate part of investors’ money, in order to attract inward investment in UK screen industry. Meanwhile, the Cultural Test has become an economic tool to access tax relief, the BFI is thus expected to become an enabler to administer the Cultural Test and help the government to further attract the inward investment.

There is no doubt that tax relief policy has become particularly popular with US studios, as their large-budget films are able to maximise the tax incentives. However, from the independent filmmakers’ perspectives, while the tax relief policy could potentially subsidise the independent production, it failed to help independent films gain profitability, instead, the independent productions are forced to compete with larger US productions for workforce. As a result, the increasing budget and skills shortages may further damage the independent film industry.

In these circumstances, with independent filmmaking heavily reliant on public funding, it has been the BFI’s responsibilities to allocate lottery funding and to provide various funding to support the independent sector. I shall discuss how the BFI has obtained both economic and cultural roles in the contemporary era, and examine the BFI’s strategies and responsibilities in the following sections.

4.2 The merging of economic and cultural policy under the BFI

4.2.1 Existing tensions between the BFI and the UKFC

In order to demonstrate how the BFI in the 2010s, can be seen as a body that has integrated economic and socio-cultural policies, I shall first examine

the BFI's roles and its relationship with the UKFC during the period 2000 to 2010. The abolition of the UKFC in 2010 was a shock to the industry, as *Screendaily* (2020) reported,

On Monday July 26 2010, the UK film industry was taken by surprise when the abolition of the UK Film Council (UKFC) – which had come into existence 10 years earlier – was announced by government minister Jeremy Hunt, with no explanation of what might replace this New Labour-created film body.

As discussed in Chapter 3, in the decade during which the UKFC was in existence, the BFI had taken on some the socio-cultural responsibilities under the wing of the UKFC. On the one hand, the UKFC allowed the BFI to pursue its own objectives, on the other hand, the government scrutinised the BFI's activities. This resulted in certain tensions between the BFI and the UKFC in the 2000s. Although John Woodward, the CEO of the UKFC, considered it to be in pretty good shape by 2010 (Doyle et al., 2015, p 185), the abolition of the UKFC was caused by both explicit and implicit factors.

First, the election of a new government in 2010 was the explicit factor that led to the UKFC being replaced by the BFI. The 2010 UK general election saw the forming of the coalition government between the Conservatives and Liberal Democrats, and the DCMS was now in the Conservatives' hands. Under such circumstance, "the Conservative wing of the Coalition came into power determined to axe at least some quangos strongly associated with Labour." (Doyle et al., 2015, p 156). Notably, a quango is an organisation to which a government has devolved power, but which is still partly controlled or financed by government bodies. The UKFC was regarded as a quango as it was constituted as a private company limited by guarantee, owned by the Secretary of State at the DCMS, and governed by a board of 15 directors. In this context, Rebecca O'Brien, UK Film Council board member, 2006-2011, noted, "I think the thought was, well, there seem to be two organisations [the UKFC and the British Film Institute] to do with film, and one is a charity that we can't get rid of very easily, and the other is an organisation which is absolutely the personification of New Labour." (Gant, 2020). Alan Parker, the founding chairman of the Council, denounced the abolition of the Film Council as "a hasty, petulant act of political vandalism executed by an arrogant and ignorant, right wing ideologue." (Doyle et al., 2015, p 184).

Second, apart from the explicit political reasons, the existing tensions between the UKFC and the BFI also resulted in the change. The BFI, which was awarded a Royal Charter in 1983, had been the main support body for British film – although not the film industry – since 1933 and was much respected as a cultural institution. For instance, it ran a series of activities including: BFI Southbank, which included the National Film Theatre, BFI IMAX, book publishing, film festivals, the BFI National Archive, production and distribution of specialised independent films, video, DVD and film releases, the BFI national library, the work of the Education department, and the leading film periodical, *Sight & Sound*. The BFI also aimed to encourage the development of the arts of film, television and the moving image throughout the UK. However, Geoffrey Nowell-Smith argues that the BFI's role was limited after the establishment of the UKFC, suggesting that “[The BFI's] loss of centrality in the film culture seems to me, in retrospect, to have been inevitable. The writing was on the wall when the 1997 Labour government subordinated it to a body called the UK Films Council, which promptly took away its film production and regional distribution functions and disabled its most active contributions to higher education.” (Nowell-Smith, 2008, p. 132).

The BFI and the UKFC also had different approaches to supporting film production. Geoffrey Macnab (2018b) argues that “in the brave new world of the Film Council, there wasn't going to be as much space, for the style of cultural film-making associated with the BFI Production Board...The Film Council hadn't hidden its desire to take a 'solidly commercial' approach to production funding.” (p. 144). In its early years, the UKFC was accused of “extreme high hardness. Some questioned Parker's role as chairman, pointing out that he had little experience of independent film-making and hadn't worked as an executive within the British industry.” (Macnab, 2018b, p. 147). The UKFC was thus a controversial organisation that aimed to achieve its goals radically, while the BFI's advantages in promoting film culture were not prioritised during the UKFC's period.

Meanwhile, although the BFI still received significant financial support from the UKFC for cultural activities, there was a lack of alignment between the UKFC and the BFI. A Parliament paper notes, “In 2001-02 the Film Council received grant in aid of £20.9 million from the Department, and used £14.5 million to fund the British Film Institute.” (The Committee of Public Accounts, 2003). However, the paper also criticised the inefficiency of the

BFI and the negligence of the UKFC, noting “The Council has left the BFI to pursue its own agenda, despite insufficient evaluation of the impact of its subsidised activities, incomplete information about how it spends the public money given to it, and incomplete alignment between the Film Council’s and the BFI’s objectives.” ([The Committee of Public Accounts, 2003](#)). The BFI was thus advised to review its pricing structure and seek financial support from the industry.

Furthermore, the tensions between the BFI and the UKFC were not only caused by the distinctive goals being pursued or as a result of the government’s scrutiny, but were also, worsened by the discord between the leaders of the BFI and the UKFC. The Director of the UKFC was John Woodward, who had previously been the Director of the BFI, while the Chair of the UKFC’s Board, Alan Parker, had been Chair of the BFI Governors. Relations between key figures at the BFI and the UKFC didn’t improve over time. According to Nowell-Smith ([2012b](#)),

By the time Greg Dyke took office [as Chair of the BFI Governors in 2008, replacing Alan Parker, as Chair of the BFI Board of Governors], relations between the BFI and the UKFC were increasingly strained. The basis structure was anomalous and needed a lot of good will to make it reasonably functional. Stewart Till, who had succeeded Alan Parker as chairman of the Council, was not seen as particularly sympathetic towards the BFI and its objectives and was known, or at least rumoured, to be at best lukewarm in his support for the Institute’s flagship project, the Film Centre. ([p. 306](#)).

Under these circumstances, the BFI was expected to regain its independence while the UKFC desired to change relations with the trouble-some BFI in 2009. ([Doyle et al., 2015, p 149](#)).

In 2010, despite the existing tensions between the UKFC and the BFI, and the political concerns of the Conservative-led coalition government, the abolition of the UKFC was still a shock to the film industry. Sally Caplan, the head of UK Film Council Premiere Fund, 2005-2010, admitted, “it was a complete shock, not least because the UKFC and its CEO John Woodward were generally well-respected, and the rumours were that the UKFC would absorb and run the BFI.” ([Gant, 2020](#)). Doyle ([2014](#)) also argues, “The abruptness of the decision to abolish the Film Council and the lack of evident and compelling

grounds for so doing suggests that film policy in the UK is at times far from rational.” (p. 148).

Meanwhile, the abolition raised the question of whether the BFI would be able to take on the economic and socio-cultural responsibilities of promoting the UK film industry. For instance, Stewart Till, chairman of UK Film Council, 2004-2009, reacted cynically, “the BFI, its DNA is about culture, and there’s nothing wrong with that. It was the best of a bad job: okay, at least give it to the BFI who have knowledge about film, rather than the Arts Council at the time.” (Gant, 2020). Geoffrey Nowell-Smith also argues,

The UKFC’s loss was the BFI’s opportunity - an albeit ambiguous one. Although the UKFC as such had been abolished, its purposes had not. An organisation was still needed to disburse Lottery funds for film production and to support wider-film cultural activity across the country...it is the Conservative-led coalition that has restored the BFI’s autonomy and the full range of functions. (Nowell-Smith & Dupin, 2012b, p. 309).

As Nowell-Smith stressed, the purposes of the UKFC had not been changed, which indicates that the BFI has inherited the UKFC’s goal of developing a sustainable film industry. The question of how the BFI has interpreted this goal will be the subject of the next section.

Despite the various voices raised about the abolition of the UKFC, under the Conservative and Liberal Democrat coalition government (2010-2015), the Culture Minister set out a package of measures to support UK film makers. The key parts of the proposal were that “The British Film Institute will take on a key role as the lead strategic film body and distributor of Lottery funds to UK film makers. Lottery funds for film will rise from around £27m currently to around £43m annually by 2014.” (Vaizey & DCMS, 2010). The BFI thus was regarded by the government as the lead strategic film body of the UK film industry from 2010 (although it didn’t officially take over from the UKFC until April 2011), while the legacy of the UKFC had an enduring impact on the enhanced BFI. In this next section, I shall discuss what those impacts are and how the BFI has integrated economic and socio-cultural policies since 2010.

4.2.2 Transforming the BFI: A new organisation for film

Even though the abolition of the UKFC was abrupt, the transformation of the BFI was rather a long and painful process. Ed Vaizey, Minister for culture, communications and creative industries, announced in 2010, “We will have one lead body for British film - a new BFI - responsible for heritage, for education and for supporting the production, the distribution and the exhibition of new British films.” (Vaizey, 2010). The new BFI was expected to not only continue its responsibilities in preserving the film culture, but also, took charge of the lottery funding, as an inherited duty from the UKFC. The government was clearly urging the BFI to undertake economic and socio-cultural activities to support the UK film industry. However, as a body which had focused on the cultural significance of UK film since the 1930s, how to fulfil the economic role and how to adjust its relationship with the government were clearly two essential tasks for the new BFI.

There were inevitable struggles during the transition, and from the minutes of meetings in November 2010, we can see that “the Board of Governors wished the BFI to remain a registered charity [and] it would be unacceptable for DCMS to control appointments to the BFI’s Board of Governors with the exception of the Chair and Deputy Chair.” (Crake, 2010b). Furthermore, the BFI had to deal with a 15% cut in Government funding and to transfer a significant number of the UKFC’s activities to its own staff. The Board highlighted its concerns about this situation in its meeting in December 2010:

As a matter of principle, no activity would be accepted unless it came with sufficient funding to deliver it. It would be unacceptable for the BFI to accept responsibility for activities without full funding since to do so would require existing BFI activities to be cut to subsidise former UKFC activities. (Crake, 2010a).

Under these circumstances, while the BFI aimed to keep itself at an arm’s length from the government, it was also intended to downsize the organisation while taking over the UKFC’s staff and activities. Eventually, the BFI (2011) declared that “Negotiations were successfully concluded with the Department of Culture, Media & Sport (DCMS) for the BFI to become a non-departmental public body on 1 April 2011.” As a non-departmental public body, the BFI is again a quango of the government, just as much as the UKFC had been. Although the BFI cut 72 posts with some activities ceased altogether, the

UKFC's activities were mostly transferred to the BFI.

The BFI thus officially became the lead body and merged economic and socio-cultural responsibilities in 2011. On the one hand, the BFI had its traditional commitment to the development of film culture, and the 2010-11 annual report presented the BFI's mission as being "to ensure that film is central to our cultural life". (BFI, 2011). On the other hand, it is noted in the BFI's annual report 2010-2011,

The Government announced that it intended on 1 April 2011 to pass to the BFI responsibility for the distribution of Lottery film funds along with the majority of the UKFC's activities (including funding partners around the UK, all delivering vital public services; hosting the MEDIA Desk and running the Certification Unit; inward investment; the Research & Statistics Unit and a number of other functions). (BFI, 2011).

While the UKFC ceased operating on 31 March 2011, and the BFI only officially took over the UKFC's responsibilities on 1 April 2011. The transition clearly started from 2010, I thus take 2010 as the start of the BFI's new role, and in the rest of the thesis, I shall study the BFI's policymaking and strategies from 2010.

When being asked whether the BFI was a good fit for Lottery funding, Amanda Nevill, the Chief Executive of the BFI, argued,

There is a misconception here. Let's look at what the BFI does, and how commercially successful we are. If you look at the IMAX, that was the highest-grossing screen for Harry Potter. The BFI Southbank's percentage of occupancy is up there in the high 40s, which is nearly double the industry norm. With the BFI London Film Festival, we negotiate year round with the distributors, studios, and production companies around the world to bring those films here, and it's a real industry reason that we do that. (Mitchel, 2010).

Therefore, apart from being a "powerfully vertically integrated cultural entity in the context of film" (Curtis, 2010), Nevill demonstrated that the BFI had a strong business capability. The BFI was determined to play a comprehensive role that contributed both to the industrial development of the film business and the maintenance of film culture in the UK.

The BFI took on its new role, carrying on the UKFC's legacy of investing in emerging film-makers, while actively adopting approaches to develop British film culture, and was thus able join things up at the same time. Nevill (2010) stressed,

For one tiny example, we put production funding in, a lot of that money will go to emerging filmmakers, there are a lot of difference when we can say, here's your money to make your film, and by the way there is all the rest of this BFI portfolio that can support you from the get go. That notion of fusion and creating this whole environment of support, that has got to be exciting.

Operating with clear purposes and strong determination, the BFI spent nearly two years "integrating the activities transferred from the UKFC, and building a new organisation based on the very best parts of both the BFI and the UKFC" (BFI, 2011). More than 10 years on from 2010, we can see that the BFI has successfully transitioned into a new era. The BFI was regarded as a replacement for the UKFC initially and shared some of the UKFC's responsibilities, while at the same time, it differed from the UKFC, as they had distinctive priorities. Firstly, the UKFC's goal was to create a self-sustaining commercial film industry and it had focused on promoting the industrial sides of its activities. The BFI, on the other hand, was supposed to achieve its balance between the cultural and industrial responsibilities, and the BFI has put more focus on diversity and inclusion in the industry. Secondly, the BFI is an arm's length government body, whereas according to *Screen International* (Mitchel, 2010), "the UKFC was set up as an arm of government which delivered film policy for the government. [The BFI] isn't owned by government and its job is not to do government policy." However, it is also worth-noting that although the BFI is not obliged to carry out government policy, it has often stood in line with the government in developing policy and strategy, such as supporting the government's goal of attracting inward investment under the framework of the creative industries. At other times, the BFI has lobbied the government for more support for the screen industry, as it did during the COVID-19 pandemic. By representing a cross-industry group, the BFI helped develop and deliver a recovery plan for the screen sector on behalf of the UK Government. I will discuss the BFI and the government's roles during the pandemic in Chapter 6.

The economic, social and political changes since 2010 brought new opportunities and challenges to the UK film industry, and the government and the BFI were also expected to develop new policies and strategies to support the film industry in the new era. How the BFI evolved to achieve its leadership through coordinating with various organisations and working with the industry will be discussed in the next section.

4.3 An overview of the BFI’s film policy strategies since 2010

4.3.1 The BFI’s first strategic plan *Film Forever*

As discussed, the BFI became the sole strategic body for film in the UK from 2010, with a combined cultural, creative and industrial role. The government and the BFI have produced various policy measures that have helped to shape the contemporary film industry, but which in various ways build on historical developments. This section presents a comprehensive chronology of the film policy making and strategies rolled out since 2010, and examines the development of the BFI and the its overall support to the industry.

Following the abolition of the UKFC, the Regional Screen Agencies (RSA) network, which had been set up by the UKFC in 2000, was restructured and replaced by Creative England in 2011. Creative England, funded by the BFI, was designed to promote the development of creative companies across games, film, creative and digital media. In particular, Creative England provided mentoring and funding to emerging film makers, while it operated predominantly outside London.

The restructure was regarded as part of a wider move by the DCMS to abolish the UKFC (Meer, 2010), although Sally Joynson (2010), Screen Yorkshire chief executive, noted, “This change does not take anything away from the achievements of the network of agencies in recent years.” Nevertheless, the change also reflected the government’s emphasise on creative industries, and film was regarded as a crucial part of the developing creative economy.

In May 2011, DCMS announced the formation of the ‘Film Policy Review Panel’ (FPRP) to conduct a major review of government film policy. Set up by the Department for Culture, Media and Sport and chaired by Lord Chris Smith, who was the first Labour Secretary of State at the DCMS in the late 1990s that ushered in the UKFC. The film review panel published its review

of British film policy *A Future for British Film: It Begins with the Audience* in January 2012, which included various recommendations to government, industry and the BFI.

This policy review contained both economic and socio-cultural recommendations, and became one of the most significant guidelines for the BFI. The review proposed a series of interventions and highlighted that the BFI should “increase audience choice and the demand for British films in the UK and overseas, and to complement policy measures to support the production of British films.” (PLC IPIT and Communications, 2012). Economically, the review urged the BFI to take charge of the lottery funds for film development and production. From a socio-cultural perspective, the BFI was expected to develop film education and to unlock resources to digitise and exhibit British film heritage. Meanwhile, the review advised that the BFI should lead on developing an international strategy for UK film, to respond to the opportunities and challenges of globalisation. (Film Policy Review Panel, 2012). The development of the BFI’s international strategy is an important aspect of the BFI’s overall strategy, which I shall dedicate further discussion to in Chapter 5. According to the review, the BFI was supposed to engage the widest possible range of audiences throughout the UK and around the world, by increasing the demand for UK films, and in so doing benefit those audiences and every part of the UK film sector.

The BFI quickly responded to the film policy review by announcing its *Film Forever* (2012-2017) strategy in October 2012. The annual lottery fund was to be between £44.7m (2012/13) and £49.8m million (2016/17) per year, less than the £54.2m UKFC funding in 2000, at the start of the UKFC period. (BFI, 2012a). Apart from maintaining the UKFC’s investments for production, distribution and cinemas, and despite the reduced funding, the BFI proposed £5.5m per year for the Audience Fund and £1.2m for the international fund, which could be regarded as an equivalent of the UKFC’s fund for inward investment.

The innovative Audience Fund aimed to support a greater choice of films across the UK. In this respect, it focused on film exhibitions to expand the audiences’ choices in cinemas or online. The Audience Fund also demonstrated that the BFI’s support for film was now prioritising investment in audiences, cinema-going and exhibition. On the one hand, this is a new emphasis, compared to the earlier policy focus on production sector. On the other hand,

it builds on the BFI's long-standing interest in the specialised, independent sector of exhibition.

The fund had three main elements. First, the BFI Film Audience Network (BFI FAN) particularly targeted local projects, and it was made up of nine Film Hubs which cover the whole of the UK. Each Film Hub was intended to deliver extensive programming, audience development activity and sector training in their region. Second, the Programming Development Fund aimed to make an impact on audience choice and admissions by enabling network members to make more adventurous programming decisions. Third, the Festivals Fund prioritised regional film festivals and festivals in the UK that have an international reach; in this sense, the Festivals Fund aimed to present UK film content to a more diverse range of people.

The international fund was used to attract investment for UK productions and to promote UK films abroad. To attract inward investment, the fund enabled the British Film Commission (BFC) to maintain its activity in the US, aiming to attract further inward investment. To maximise the inward investment had been an essential strategy of UKFC, and the BFI inherited and strengthened this strategy, noting that “on average, [inward investments] account for three quarters of total film production spend in the UK and in 2011 this UK spend associated with inward investment features was £1 billion.” (BFI, 2012a). Diverging from the UKFC's focus on attracting inward investment from the US, the BFI aimed to use the fund to “investigate opportunities to win new business from other priority territories” (BFI, 2012a). This indicates that the BFI was seeking new opportunities in the emerging big film market, such as China and Brazil; whether the attempt has succeeded will be discussed in Chapter 5. In this context, the BFI promoted UK film production as a profitable investment for international investors.

In addition, the new Distribution Fund focused on support to increase audience reach for independent British and specialised cinema. The Distribution Fund was rather new as it not only promoted independent and specialised films for a wider distribution, but also, it embraced digital opportunities alongside ambitious release plans. It therefore contributed to the release of more independent films by encouraging an innovative distribution model to reach audiences on various media platforms.

The BFI's support for film production could be divided into two parts, first, the BFI Film Fund directly awarded film productions, the development

of feature film projects, talent development and business development. As the BFI (BFI, 2012a) stated, “The most significant responsibility of the BFI Film Fund is its support of UK feature film development and production and – integral to this – supporting the growth of high-calibre filmmakers at all stages of their careers.” The distribution of Lottery funds in productions also supports producers in their efforts to gain financial success for their films; in this case, the BFI has stood in line with the UKFC’s purposes of building a commercially sustainable UK film industry.

Second, the BFI on behalf of the government administered aspects of the tax relief policy designed to attract inward investment. As I have discussed in the previous section about the government’s tax relief policy, the BFI was put in charge of examining films through the Cultural Test, which determined whether a film could qualify as a British production for tax relief purposes.

Film Forever also highlighted the significance of skills development, and the BFI set up the BFI Film Skills Fund to ensure that the skills base in the industry could be effectively enhanced. In this instance, the BFI would work with Creative Skillset and the Department for Business, Innovation and Skills (BIS) to produce strategies and secure investment. The BFI’s support for skills development could be seen as a continuation of the UKFC’s *A Bigger Future* initiative, launched in 2003 and implemented by Skillset in partnership, which was designed as a five-year education and training plan for film skills. However, the BFI reduced the investment in skills development, as was noted in *Review of A Bigger Future – the UK Film Skills Strategy*: “Between April 2004 and March 2008, more than £29 million was allocated specifically to the delivery of A Bigger Future – an average of £7.3m per year.” (UKFC, 2008). In comparison, the BFI proposed a spend of £5.1m in Skills and Business Development in 2012/13 and £6.1m since 2013/14 (BFI, 2012a).

While *Film Forever* was the BFI’s first published strategy since 2010, the BFI inherited the UKFC’s strategy to a great extent and had the same economic goal as the UKFC. Nevertheless, it also developed some innovative approaches, such as aiming to reach a diverse range of audiences, supporting British independent cinema and seeking international partnerships beyond the US. In 2014, the Film Policy Review Panel’s follow-up report *It’s still about the audience: two years on from the Film Policy Review* gave the BFI credits as the lead agency for film, noting that,

The Panel recognises the progress that the BFI has made towards

implementing many recommendations from the Film Policy Review in its 5-year plan. As it matures in its role as lead agency for film in the UK, we would encourage it to find an optimum balance between providing strong industry leadership and truly collaborative partnership working that allows partners the necessary licence to deliver against their remit.” (Film Policy Review Panel, 2014).

The report demonstrated that the BFI had survived its transformation and gained the trust of the government.

In the same year, the Creative Europe Desk UK, which promoted awareness and understanding of opportunities in the EU market, and especially the Creative Europe funding scheme, was established. The UK MEDIA Desk, which had provided information and advice to UK professionals since the UKFC era, thus became Creative Europe Desk UK. As a result, Creative Europe’s MEDIA sub-programme team was based at the BFI in England, and worked with the BFI as one of the partners reaching out to new audiences.

4.3.2 The BFI’s second strategic plan *BFI2022*

BFI announced *BFI2022*, its second five-year strategy for UK film, in November 2016. *BFI2022* built on the foundations laid by *Film Forever*, “investing almost £500 million from 2017-2022 made up of Government Grant-in-Aid, BFI earned income and National Lottery funding, *BFI2022* further outlines how the BFI will continue to focus on audiences and culture, supporting film education and skills development and backing exciting new filmmaking.” (BFI, 2017d). In the introduction to the new strategy, Josh Berger, who had taken over from Greg Dyke as the Chair of the BFI, and Amanda Nevill highlighted the BFI’s achievement in its cultural programme and the increased investment in the UK screen industry. But they also recognised certain challenges, noting that “a recent BFI taskforce found significant obstacles for those who choose to pursue a career in the film industry, and diversity in the workforce is poor. So we are missing out on the talent and creative potential of a great number of young people that we really need for the future.” (Berger & Nevill, 2017).

Investing almost £500 million from 2017-2022, *BFI2022* proposed several new strategic priorities, including the investment in ‘Future Audiences’ (£238.8 million), ‘Future Learning & Skills’ (£58.5 million), ‘Future Talent’ (£140.1 million) and ‘Leadership, Research, Certification & Delivery’ (£51.4 million). (BFI, 2017a). In doing so, the BFI aimed to support film across

every platform beyond the big screen, drive forward diversity and skills and promote the growth of screen industries locally and globally. (BFI, 2016a).

In particular, the BFI has focused on reaching a more diverse range of audiences in the nations and regions. The BFI also has developed its support for independent production alongside support for audiences and its commitment to developing a more diverse workforce in this period.

Josh Berger (2017) declared “In our *BFI2022* strategy we committed to undertake a special commission to look more deeply into the current health of independent film.” As the BFI Commission on UK Independent Film noted, “The *BFI2022* strategy made a commitment to look more deeply at the UK independent film sector as digital innovation is creating seismic change for the industry and offering new opportunities to filmmakers and audiences.” (BFI Commission, 2017), As such, the Commission recognised the opportunities and challenges facing the independent film sector. The report also made proposals and recommendations to enable independent film to grow. For instance, it suggested the government and the BFI should “maximise the potential value of the UK film tax relief, drive growth domestically and internationally, strengthen conditions for co-production, continue cooperation with the EU after Brexit and build our relationships in key growth markets.” (BFI Commission, 2017). The suggestions were clearly valued and partially taken by the BFI in *BFI2022*. For instance, *BFI2022* highlighted,

We will grow the engagement of 16-30 years old with British independent and specialised film across all BFI activities by 2022, ensuring audience-facing activity prioritises and encourages this demographic, who are making the decisions that will inform their film tastes for a lifetime. (BFI, 2017d).

In addition, one of the BFI’s goals to reach by 2022 was to “fund a range of innovative and pioneering moving image work intended for a variety of platforms.” (BFI, 2017d). In this context, supporting independent film sector has been a crucial strategy in the BFI’s second five-year plan.

Meanwhile, in 2017, the BFI Distribution Fund was abolished, and the BFI Audience Fund and the new Film Audience Network (FAN) were prioritised in its place. It is declared in *BFI Film Audience Network 2017-2022* that “in *BFI2022* we set out our commitment to giving everyone, everywhere in the UK the opportunity to enjoy and learn from the richest and most diverse range of great British and international filmmaking, past, present and future.

The BFI Film Audience Network and the BFI Audience Fund are central to this commitment and will be underpinned by our desire to boost diversity and inclusivity.” (BFI, 2017c). Furthermore, the BFI streamlined the Film Hubs into eight regional and national hubs, with four of the Film Hubs formed by the nations of Scotland, Wales and Northern Ireland, Greater London, and the remaining four covering the rest of England in the North, the Midlands, the South East and the South West. (BFI, 2017c). Funded by National Lottery funding, the film hubs are intended to build diverse audiences and support the cinema exhibition sector in the nations and regions.

In 2018, in the wake of the Brexit vote, the BFI also published a *Mapping Study of EU Funding of the UK Screen Sectors 2007-2017*, this established that “since 2007, there have been 1,766 identifiable projects that have benefited the UK screen sectors with a total value of £298.4m.” (BFI, 2018a). The study also noted that cultural programmes have had the highest total value out of the £298.4 m, including Creative Europe and its predecessor programme, MEDIA, while the European Regional Development Fund and FP7 (later replaced by Horizon 2020) were also notable for the size of their value. (BFI, 2018a). The study was undertaken following the Brexit vote, as the Government had expressed its intention to create a new ‘UK Shared Prosperity Fund’ to replace structural funds and reduce inequalities across the UK post-Brexit, and the BFI aimed to demonstrate the value of strategic investment in the screen industries by gathering evidence on the impact of EU investment.

Although the Creative Europe Desk UK was closed and the UK Shared Prosperity Fund, which was launched in April 2022, did not focus on supporting the screen industry, the BFI’s lobbying led to new responsibilities. Launched in 2021, the newly-established Global Screen Fund was administered by the BFI and was designed to boost international development, production, distribution, and promotional opportunities for the UK’s independent screen sector. (BFI, 2022i). The operation of the fund and the BFI’s new international strategy will be discussed in Chapter 5.

With the outbreak of the COVID-19 pandemic in 2020, the UK film industry faced unprecedented crisis. To reduce transmission of the virus and protect the NHS, the government introduced nationwide lockdowns and other restrictions. This meant that, in 2020 and 2021, film productions were paused and cinemas were closed for long intervals. Under these circumstances, the BFI played a crucial role as the lead agency for film during the pandemic,

and it managed to provide various support for the different sections of the UK screen industry impacted by the COVID-19 crisis. For instance, the Screen Sector Task Force has worked to secure screen sector recovery and the BFI “repurposed over £4.6m in National Lottery funding to target specific areas of the sector, including exhibitors, freelancers and producers.” (BFI, 2020b). Notably, this was an unprecedented subsidy to the exhibition sector, as I have noted in Chapter 3 that the government support has usually focused on production sector. Indeed, the BFI’s leadership during the pandemic demonstrated that the BFI is now very much at the heart of the screen industry, as it has coordinated with various organisations and collaborated with the government to strategically support the industry. I will give a more detailed discussion about the policy measures developed during the pandemic in Chapter 6.

It is also worth discussing the change of leadership of the BFI since 2020, when Ben Roberts was appointed as Chief Executive of the BFI. Unlike Amanda Nevill, the outgoing Chief Executive who worked in museum and galleries before taking over the BFI, Roberts had a rich experience in the film industry across international sales, studio acquisitions, UK distribution and film finance. According to the BFI (2019a), “Ben Roberts joined the BFI in 2012 as Director of the BFI Film Fund, [and was] then promoted to Deputy CEO in October 2018, responsible for overseeing the BFI’s Lottery investments in film development, production and distribution, along with the BFI’s international activities.” When Nevill started in the role of CEO of the BFI during the UKFC years, not only did she have responsibility for transforming the organisation, she also had to deal with a perilous financial situation. She admitted that the first few years were difficult. (Tutt, 2020). The situation was different when Roberts took the role, since the BFI was now trusted by the industry and the government as the lead agency for the UK film industry. Moreover, Roberts’ industrial experience may have given him more empathy with producers and distributors. At the time Nevill stepped down, her biggest concerns for the film industry were the future of British independent film and the Diversity Standards. Nevill also stressed that “Ben was an absolute activist behind the design of the Diversity Standards and I know he’s going to take that flag and he’s going to really run with it.” (Tutt, 2020). Roberts was obviously expected to lead the BFI to face new challenges going forward. However, what no-one expected was that, almost as soon as Roberts took over,

he would have to lead the BFI in its response to the COVID crisis. As a result, analysing the BFI's response to Covid, which will be discussed in Chapter 6, and the organisation's next 10-year plan, which will be discussed in Chapter 7, is the best approach to understanding the BFI's strategy under Roberts' leadership.

Discussing the measures applied to the film industry between 2010 and 2022, it is clear that the BFI has played an essential role in developing film strategies and executing the government's policies in this period. Its transformation and development can be divided into three stages: first, the BFI delivered the transformation in industry leadership from the UKFC to the BFI and successfully secured its independence and funding between 2010 to 2012. Second, the BFI was subject to certain interventions and produced its own strategy from 2012 to 2017, at which stage, the BFI's leadership was recognised by the government and the industry. The third stage was from 2017 to 2022, when the BFI has not only revised its strategies to reach more diverse audiences, but also to create a more diverse workforce, through the Diversity Standards that I shall discuss in the later section 4.4. Furthermore, the BFI proved its abilities to coordinate with government and various organisations to strategically lead the industry during the COVID-19 pandemic.

Looking back to the responsibilities required from it by the government in 2011, it was noted that the BFI should distribute the Lottery film funds, host the MEDIA Desk, part of the European Union's programme to strengthen the competitiveness of audiovisual product, run the Cultural Test Certification Unit for the purposes of film tax relief, help attract inward investment, run the Research & Statistics Unit and work with funding partners around the UK. (BFI, 2011).

Indeed, the BFI has accomplished these tasks, but has also developed its own strategy to support various sectors of the UK film and TV industry. Economically, the BFI is in charge of Lottery Funding and has in addition provided various financial subsidies to the UK screen industry. Culturally, it was given a remit to support the industry in the Nations and the Regions of the UK, and to lead on all aspects of film culture including audience development and education. In addition, the BFI has continued its work in relation to archiving and education, and has worked hard to preserve UK film culture, through its commitment to archiving and film heritage. It has also devoted itself to supporting UK independent cinema, while significantly contributing

to diversity and inclusion in the industry.

The BFI works closely with the government as a non-departmental body and helps to shape film strategy and policy in the UK. Not only has it inherited the UKFC's purpose of promoting a commercially sustainable UK film industry, it has also tried to balance socio-cultural concerns with the economic support available to the UK film industry. As the film policy review panel suggested, the BFI has adopted "reaching the widest range audiences" as its goal. To realise this goal, the BFI has promoted UK film to a diverse range of audiences in the UK and abroad, while offering a diverse cultural programme to cinemas and for online streaming.

However, it remains debatable whether the BFI's prioritised strategies have achieved the expected results, and in the later section 4.5 I shall examine the BFI's main achievements and challenges during the second five-year plan from 2017 to 2023. Finally, in Chapter 7, I will discuss its ambitious new 10-year strategy from 2023 to 2033, launched in September 2022.

4.4 Diversity & Inclusion policy

I have so far focused on the BFI's and the government's economic measures since 2010 in this chapter. It is also important to note the development of socio-cultural policy in this period, and the way in which it has shifted significantly from socio-cultural film policies developed in earlier periods. The BBFC, as discussed in Chapter 3, has been a moral gatekeeper of the UK film and TV industry. As such, it represents more or less the full extent of socio-cultural film policy in the historical context. As a moral gatekeeper, the BBFC worked to keep some films and some content out of the gate, instead of embracing all content. By comparison, questions of diversity and inclusion have become central purposes in film policy in the contemporary era, the BFI in particular has developed an inclusive strategy that encourages diverse content, made by a diverse workforce. In this section, I look at diversity and inclusion as a crucial agenda, adopted both by the UKFC and the BFI. I shall focus in particular on the BFI Diversity Standards to examine their effects and their deficiencies in the current stage.

There is no denying that diversity and inclusion has been a globally heated topic in recent years, since #Oscarssowhite trended in 2015 and 2016, when there were no people of colour nominated for the 20 acting nominations.

The Black Lives Matter (BLM) Movement also gained international attention during the global George Floyd protests in 2020, the movement highlighting racism, discrimination, and racial inequality experienced by black people. Improving diversity and inclusion has become a salient topic, with policymaking expected to lead to significant changes in society in general, and the creative industries in particular. Although the movements mentioned above did not originate in the UK, they brought diversity and inclusion onto the global stage in an unprecedented way. Debates about and measures to improve diversity and inclusion in the UK film industry, however, can be traced back at least to the election of the Labour Government in 1997, and in the 2000s, as noted in Chapter 3, the UKFC developed such policies for the film industry.

In the following two sub-sections, I first describe the development of the BFI's Diversity Standards, and explore what the obstacles have been in policymaking and in practice. Subsequently, I analyse the effects of this policy initiative. I argue that while the BFI's diversity policy pioneers to promote diversity and inclusion in the UK screen industry, the BFI Diversity Standards have not been able to radically improve diversity and inclusion on screen or in workforce, not only because the BFI Diversity Standards are quite flexible for producers, but the inward investment projects are also not obliged to follow such Standards. Moreover, the government needs to bear some of the blame, as its policies have not yet been in line with the BFI's diversity strategy. I shall examine these issues in detail in the following sections.

4.4.1 The BFI Diversity Standards

As we have seen in Chapter 3, there is no denying that the UKFC made a great effort to contribute to diversity and inclusion before it was disbanded. By comparison, it took the BFI a while to regain this momentum. According to *Screendaily* (2020),

When the UKFC was abolished, the [diversity and inclusion] team was not transferred over by the DCMS to the BFI, and the BFI did not continue with Breakthrough Brits, which had been considered a costly scheme, involving flying out recipients to a networking event in Los Angeles. The BFI did not create the senior post head of diversity (reporting to the CEO) until April 2017, although the role of diversity manager had previously existed.

Indeed, the BFI did not establish a comprehensive diversity strategy as soon as it became the lead agency of the UK film industry. At the consultation of the BFI's first five-year plan, it was noted that "Respondents want to see a greater commitment to diversity across all three strategic priorities. Respondents also wanted us to commit to equality of access, including for people with sensory impairments." (BFI, 2012a). In response, the BFI Governors "decided to set up a Diversity Fund to build capacity in this area; diversity and equality principles will also be embedded and monitored across all BFI funding schemes and activities, including the Film Fund." (BFI, 2012a). However, the Diversity Fund was rather insignificant, with the awards ranging from between £1,000 and £10,000 for individuals and between £1,000 and £30,000 for organisations. (BFI, 2015a). Meanwhile, the funding was not designed to support film production, rather, it was intended to support events aimed at tackling issues around diversity in film or skills development. In this context, the BFI Diversity Fund could not be compared with the UKFC's New Cinema Fund, which had far more money available.

Despite that, the new BFI fund was important, as it led to the development of the BFI's diversity policymaking. According to the BFI (2020a), "The Diversity Standards were initially piloted on projects backed by the BFI Film Fund to test their viability as a framework that could be a much-needed agent of change." The BFI initially introduced the Three Ticks scheme, backed by the UK producers' association Pact, as a pilot in 2014. Meanwhile, the Three Ticks diversity quota was applied to all film projects in receipt of BFI Lottery Funding, and other UK funders including Creative Skillset, Creative England etc. As the name of the scheme suggested, it required applicants to the BFI Fund to demonstrate how their project would "succeed in tackling under representation across four areas of their project, with at least one tick needed in a minimum of two areas." (Wiseman, 2015). I do not intend to discuss the details of the Three Ticks, as it was replaced by the BFI Diversity Standards, however, the Three Ticks scheme was clearly designed to address diversity and represented the BFI's strategic promotion of diversity and inclusion in the UK screen industry. Ben Roberts said in a statement to *The Guardian* (2014): "The 'three ticks' approach incentivises good practice and helps to embed diversity across every area of a film's production, whilst being flexible enough to allow productions to make positive choices. Ideally, we want to see the industry embracing the three ticks approach to ensure that the most talented

are able to progress and succeed, whatever their background.”

The Three Ticks scheme was then renamed and launched as the BFI Diversity Standards in 2016, with the new scheme inheriting the Three Ticks’s focus and its flexibility for producers. Distinctive from the UKFC’s strategy to encourage the production of diverse film content the new scheme was designed to apply, “Diversity Standards across all Film Fund Lottery funding schemes, including film development, production, distribution and audience development to recognise and acknowledge the quality and value of difference.” (Malik, Chapain, & Comunian, 2017, p. 313). Thus the BFI aimed to quantify diversity “in terms of levels of diversity on-screen or in the social composition of the workforce.” (Malik et al., 2017, p. 313).

The Diversity Standards focused on characteristics protected under the Equality Act 2010 and promoted diversity and inclusion in four areas, including Standard A: On-screen representation, themes and narratives, Standard B: Creative leadership and project team, Standard C: Industry access and opportunities, and Standard D: Audience development. Thus diversity and inclusion applied across content diversity, workforce diversity and opportunity equality. As a mandatory policy, the BFI required that applicants for any BFI funding must meet the minimum criteria on at least two of the four Standards. Films are assessed via information submitted by producers, or by distributors if applying for awards. All BFI, BBC Films and Film4 funded productions have to meet the Standards. (BFI, 2020a).

As Malik et al note, the BFI scheme places the emphasis “on quantitative modes of measuring diversity.” (Malik et al., 2017, p. 313). Thus the criteria in each category have been presented in quantitative terms, for example, one of the criteria in Standard A requires the total of the film’s secondary or more minor on-screen individuals to meet one, or more, of the following targets:

A 50-50 gender balance

20% belonging to an under-represented ethnic group

10% LGBTQ+

7% D/deaf and disabled

Significant amount of contributors or competitors resident in the UK outside of London and the South East of England

Significant amount of contributors or competitors from a lower socioeconomic background (BFI, 2019c).

The quantitative measure is not only applied to on-screen representation, but also to production department heads and crews, requiring a certain number of key roles to be held by people from under-represented groups.

By insisting on these standards, the BFI is raising the profile of diversity and inclusion as worthwhile aspirations and goals. However, there are still some loopholes as it leaves producers with certain flexibility, and some producers may avoid challenging the old structure of crews or cast. For instance, not all Standards need to be met in order to fulfil diversity obligations, only 3 out of 6 criteria need to be met to fulfil Standard A, and producers only have to achieve a 50-50 gender balance to meet one criteria in Standard A.

To achieve Standard B, producers need to meet two out of four criteria, including having at least 3; out of 22 of the Heads of Department or Creative Leadership from under-represented groups or having 6 mid-level crew/team and technical positions from under-represented groups. While these two criteria are not necessary to fulfil to achieve Standard B, it is possible that nobody from an under-represented group will be promoted or hired for any of the key roles.

Standard C focuses on providing employment or training opportunities to people from under-represented groups, and Standard D values marketing strategies to attract diverse audiences. Both of these criteria are rather easy to meet.

Although there is a lack of compulsive requirement on each criteria and some criteria can be easily met, it may be argued that fewer producers would have tried to fulfil these criteria if the BFI hadn't introduced the Diversity Standards. However, the aim to highlight the under-presented groups in employment and casting can mean that producers are put in a contradictory position. On the one hand, they are expected not to take ethnicity and skin colour as semiotically significant, prioritising instead professional skills; on the other hand, they are meant to recognise ethnicity and colour to meet the requirements of BFI Diversity Standards.

4.4.2 The effects of the BFI Diversity Standards

Three years after the launch of the BFI Diversity Standards, BFI's initial findings from 2016 to 2019 showed that "90% of applications [of the BFI's funding] fulfilled at least the minimum criteria for at least two of the Standards, and among these applications, 86% met A, 67% met B, 74% met C and 25%

met D.” (BFI, 2020a). In this case, the BFI’s data was rather encouraging and the Diversity Standards should be seen as encouraging behaviour that should be applauded. However, the UK film and TV industry continues to be accused of lacking diversity and inclusion. Steve McQueen, the Oscar-winning director of *12 Years a Slave*, claimed in 2020 that “last year, I visited a TV-film set in London. It felt like I had walked out of one environment, the London I was surrounded by, into another, a place that was alien to me. I could not believe the whiteness of the set. I made three films in the States and it seems like nothing has really changed in the interim in Britain. The UK is so far behind in terms of representation, it’s shameful.” (McQueen, 2020). He further pointed out, “It is also about class in the British film and television industry, the British class system. The two issues overlap: race and class. It’s the Oxbridge thing and it’s throughout the media.” (McQueen, 2020).

These statements appear to be contradictory, this section therefore aims to find out the effects of the BFI Diversity Standards, and explains that why the BFI has presented a rather positive picture while the industry as whole does not. It is also necessary to ask where the government’s policymaking sits in the framework of diversity and inclusion?

In a bigger picture, data show that neither the workforce nor the content the film and TV industry produces reflects the diversity of the UK population. “A 2017 report by the Work Foundation found that 3% of employees in production are from a minority ethnic background; just one in five key production personnel are women; and only 5% of screen workers consider themselves to be D/deaf and/or disabled.” (BFI, 2020a). In comparison, while the female population is around 50% of UK population, roughly half of disabled people were in employment (53.2%) by 2019. (Labour Force Survey, 2019). The data at the government’s 2011 Census, which was published in 2018, also showed that while “87% of people in the UK are White, 13% belong to a Black, Asian, Mixed or Other ethnic group.” (UK Government, 2018). Most UK film production takes place in London and the south-east, and London is “the most ethnically diverse region in England and Wales ... where 40.2% of residents identified with either the Asian, Black, Mixed or Other ethnic group.” (UK Government, 2018). Thus, while data at the Census demonstrated “the qualitative changes that have occurred amongst Britain’s ethnic minority population.” (Nwonka, 2015, p. 86). However, employment in the industry hardly reflected these changes.

Research conducted in 2020 by Nwonka with the co-operation of the BFI, particularly suggested that “BAME participation in the industry remained considerably lower than other under-represented groups, particularly in behind-the-camera roles.” The report also found that there is a far lower proportion of films dealing with race or ethnicity than films dealing with questions of gender: “of the 235 films between 2016 and 2019 that adhered to the diversity standards, 117, or 50%, cited race or ethnicity as a factor in their story/content, compared with 149 (63%) for gender. The gap was even more marked with employment figures: 93 projects, or 40%, cited race/ethnicity as a factor, compared with 168 (71%) for gender.” (Nwonka, 2020b). Nwonka’s findings indicated that it is easier to achieve gender equality to meet the BFI Diversity Standards, which has thus resulted in the low participation of BAME groups in the industry.

On the one hand, “the BFI Diversity Standards have been adopted by BBC Films and Film4 and are being piloted by Screen Scotland, making them a requirement for the majority of public funding for film in the UK.” (BFI, 2022b). On the other hand, the differences in achievement between independent and inward investment films exacerbate the lack of diversity and inclusion in the industry. For instance, independent producers are obliged to follow the BFI’s diversity policy, if they want to access the BFI’s funding such as Future Takes, BFI Development Funding, BFI Discovery and Impact funding, and UK Global Screen Fund. However, it is worth noting that film productions that attract inward investment and benefit from tax relief policy are not subject to the same level of scrutiny and restriction regarding the BFI’s Diversity Standards. This is because the Diversity Standards and the Cultural Test have not been integrated or joined together, meaning that the specific diversity requirements set by the BFI do not apply to productions solely benefiting from tax relief and the Cultural Test.

In 2020, the BFI reported that they were making some headway with big-budget producers, including Hollywood studios operating in the UK. For instance, they noted, “Paramount Pictures was the first studio to sign up to the Standards for its UK-based productions and we maintain an active dialogue with other studios on their adoption too.” (BFI, 2020a). In this respect, whether the US studios are willing to fall in line with the BFI’s diversity policy will indeed be crucial when it comes to promoting diversity and inclusion in the UK screen industry.

Apart from the lack of cooperation from Hollywood studios, BFI's diversity policy is also lacking support from some of the other economic and socio-cultural policies pursued in the UK. Jack Newsinger and Doris Ruth Eikhof argue that there are explicit diversity policies and implicit diversity policies, explaining that "we understand as explicit diversity policies those discourses, actions and interventions at the level of government, organisations, companies and other social actors that make a clearly stated attempt to increase the diversity of the film and television workforce." (Newsinger & Eikhof, 2020, p. 50). The BFI Diversity Standard is thus an explicit diversity policy, as it explicitly intervenes the proportion of people from under-presented groups in a film. Conversely, the implicit diversity policies Newsinger and Eikhof identify include "cultural, media and economic policy that affects labour markets in diversity-relevant ways; education or social policy that indirectly shapes young people's equality of access to arts and culture." (Newsinger & Eikhof, 2020, p. 50). The implicit diversity policies therefore include BFI's strategy to develop a more diverse screen culture and its contribution to skills training.

The government's interventions should be regarded as another implicit factor that contributes to the diversity and inclusion in the UK screen industry. However, despite the BFI's determination to promote diversity and inclusion, the government's policies have not always been in line with this aim. As the government's most significant economic policies, the tax relief and Cultural Test have focused on attracting inward investment and paid little attention to the question of how to increase diversity and inclusion in the screen industry.

Indeed, the Cultural Test, which initially seemed to promote cultural diversity in the film industry, became incompatible with the BFI Diversity Standards today. When it was launched, the Cultural Test acknowledged the significance of cultural diversity, with the *Cultural Test Guidance Notes* (2007) stating that "The diversity of Britain is a celebrated feature of British culture and a key determinant of a culturally 'British' film is the communication of this element of our society." The Test set the 'cultural contribution' category to encourage diversity on screen, and points would be awarded to significant representation or reflection of British cultural diversity. One point was for subject/portrayal that explores contemporary social and cultural issues such as disability, ethnic diversity and social exclusion on screen, or promotes and increases visual, on-screen diversity; another point was for other factors impacting on the final content. (DCMS, 2007) Higson has noted the signifi-

cance of this in the context of British cinema, pointing out that the ‘cultural contribution’ category for the first time in UK film policy has “respectively foregrounded cultural diversity and a creative or innovative approach to representation.” (Higson, 2011, p. 61).

However, the Cultural Test only gives credit to diversity on screen and therefore neglects the question of diversity behind the camera. Moreover, it somewhat controversially award 6 points to dialogue recorded in English or EEA languages, encouraging storytelling based on British or EEA subject matter. On the one hand, this helps films made with US inward investment achieve more points, on the other hand, the emphasis on languages could result in a lack of diversity and inclusion on screen. For instance, if a story about immigration or refugees takes place in contemporary UK society, characters may not necessarily have most of their conversations in English, which in this case, creates a dilemma that a story representing authenticity and diversity may not achieve enough points to pass the Cultural Test.

One example of this problem, albeit from a different cultural and industrial context, is the Oscar-nominated American film, *Minari*(2020). Directed by Lee Isaac Chung, the film follows a family of South Korean immigrants who try to make it in the rural United States during the 1980s. The actors speak both English and Korean in the film, however, the film’s categorisation caused debates when it won the Golden Globe Award for Best Foreign Language Film in 2021. Samantha Larkin (2021) commented, “In labelling the film with ‘foreign’ language, the Golden Globes perpetuates harmful stereotypes about language and culture in the US: that languages that are not English do not qualify as American” As Larkin (2021) noted, “The categorisation appalled many Asian American actors, professionals, and audience members. Daniel Dae Kim tweeted that the nomination in the Foreign Language category, rather than the preeminent Best Drama, was the “film equivalent of being told to go back to your country when that country is actually America.”

Although *Minari* is an American film, the UK film industry certainly faces the same dilemma as the US, as the same situation could well happen in the UK as well. One could imagine that a film like *Minari* may not receive the 6 points for English languages, and in this respect, fail to pass the Cultural Test or qualify to receive the tax incentives.

In this sense, the unmodernised government policies could further reduce the impact of the BFI Diversity Standards. While the BFI Diversity Stan-

dards have started to challenge the stereotypes that are rooted both in British history and the history of filmmaking itself, such as the characters' authentic languages and BAME characters in historic films, the Cultural Test has not rewarded such development, despite the changes in British society and the screen industry.

Even though the BFI's diversity strategy alone has not radically changed the stories that are told on screen or the people who appear in them, it has changed people's perception of diversity and inclusion to some extent. There is no denying that producers are urged to take the issue of diversity more seriously. The BFI Diversity Standards can be seen as an important first step, which has raised the profile of diversity and inclusion and provided a comprehensive picture of how to achieve diversity and inclusion in the industry. It is also encouraging to note that BAFTA announced that diversity and inclusion criteria would be introduced into the eligibility requirements for the 2019 Film Awards, making it the first major awards body to take such a step. ([BAFTA, 2022](#)). The Academy of Motion Picture Arts and Sciences announced new representation and inclusion standards for Oscars, starting with the 96th Academy Awards in 2024. The *Guardian* notes that the taskforce was led by academy governors DeVon Franklin and Jim Gianopulos, and "they took into account diversity standards used by the British Film Institute and the British Academy of Film and Television Awards." ([Guardian, 2020](#)).

To achieve a more diverse film culture on screen and to further improve the diversity and inclusion in workforce, there are at least two approaches. First, the BFI Diversity Standards could still be improved, they are not as strict as they may initially appear, and the flexibility offered to meet the standards has allowed producers to evade necessary changes. Second, diversity and inclusion is not only the BFI's problem, it is also the industry's and society's. At present, not all the inward investors are compelled to contribute to diversity and inclusion in the UK, and they can not be restrained by BFI Diversity Standards. As such, the Cultural Test, which is not in line with the BFI Diversity Standards, has not successfully provided mandatory diversity guidelines to inward investment films. As a result, the content diversity and workforce diversity have remained limited. Thus, as the inward investment projects have become an important parts of UK productions, it is not sufficient enough that the BFI's diversity policy only applied to the indigenous productions, rather, The government should take further responsibility to ensure that Diversity

Standards are implemented across the industry as a whole.

4.5 The BFI at the end of *BFI2022*

At the end of the period covered by *BFI2022*, it is necessary to examine whether the BFI has reached its goal and what challenges the BFI is still facing. The BFI listed 13 key performance measures when they launched their second five-year plan in *BFI2022*, aiming to contribute to further economic and cultural success for UK film by 2022. The economic goals could be summarised as promoting inward investment production in the nations and regions, supporting the independent film business and improving employers' ability to recruit a skilled workforce across the UK. Meanwhile, the cultural goal focused on improving diversity and equality for talent (the lead creative roles in film production) and audiences. As I have examined the BFI Diversity Standards and their effects in the last section, I will focus on the BFI's economic goals at the end of 2022.

However, some factors affecting the performance of the UK film sector were not within the BFI's control, such as the pandemic. As was noted in the latest BFI's 2020-21 (Year 4) Report, performance was inevitably impacted by Covid and the furloughing of staff, and this needs to be taken into account in any evaluation of the BFI's success. Therefore, I intend to not only rely on the data in the report to examine the BFI's contribution, but also to look at the industry's performance for a comprehensive understanding.

The British film industry at the end of *BFI2022* is in prosperity as well as in crisis. The prosperity lies at the big-budget end of the production sector that benefits from inward investment; meanwhile, the crisis is happening in several aspects, including independent filmmaking, skills development, and film activities in nations and regions. While these appear to be separate issues, they also share the same cause that is rooted in the way that the UK film and TV industry is organised and the way that the government's main policies work, notably the tax relief system. I argue that the increasing inward investment has resulted in controversial consequences. On the one hand, this investment has contributed to the UK film economy and helped the quick recovery of the UK film industry from COVID-19. On the other hand, this puts the independent sector under threat and accelerates the skills shortages. I therefore acknowledge the benefits that have been brought by

inward investment, but I shall focus here on examining the challenges faced by the UK film industry at the current stage and discovering what could be improved in the BFI's next 10 year strategy in Chapter 7.

First, I shall look at the independent film sector. Due to the appealing tax incentives, and the BFI and the government's effective COVID measures, which will be discussed in Chapter 6, inward investment has significantly increased in the post-pandemic era. According to British Film Commission (BFC) (2022), "Record levels of inward investment production spend reinforce UK's position as a leading global production centre, [and]inward investment spend on films and High-end TV delivered £4.713bn, or 84% of UK total film and HETV spend – double the levels reached in 2020." Adrian Wootton (2022), Chief Executive of the British Film Commission, also commented: "The demand for content has never been greater. As today's figures show, the UK is enjoying a once-in-a-generation growth in production. The benefits are being felt right across our nations and regions, with large-scale investment in infrastructure and revenue into UK plc that will directly benefit local communities."

It is important to recognise the impact this situation has on the independent film sector, the first point of crisis in the current period. As discussed in the section above on tax relief policy, independent film production continues to struggle and still relies heavily on public funding. As Steel (2015) argues, "The key challenge of the independent film sector is expressed frequently in terms of shortage of finance. But, actually the problem is lack of profitability. Not because the films are too expensive—most are cheap—but because UK independent films earn insufficient UK and global revenues." Amanda Nevill, previous Chief Executive of the BFI, also expressed her concerns about independent films when she left the BFI in 2020,

It's the whole environment for independent film. I don't mean independent, box-set television making, as I think that's going to be fine. I mean independent film. The problem is the combination of the whole economic model for film, the drop in international sales, combined with what I think is going to be quite a complex navigation out of Brexit, it's very hard. (Tutt, 2020).

Nevill's worries indicate that independent film is facing both international and domestic challenges. Internationally, the lack of European funding after

Brexit and the change of international distribution models resulted in an uncertain environment for filmmakers and investors. Domestically, small-scale independent productions are unable to compete with big inward investment films. A new report, *An Economic Review of UK Independent Film*, was published in 2022 to illustrate the new challenges faced by UK independent films. While there has been rapid growth in UK production,

The review's findings are that the speed and volume of this growth has exacerbated the strain on the independent sector, which cannot compete with larger budget international productions on a variety of levels from accommodating the rising cost of production to securing cast and crew and ultimately to reaching audiences. (BFI, 2022d).

The comprehensive review pointed out that the challenges are faced by UK independent filmmakers include: significant cost pressures, challenges to film financing, disruption to traditional distribution models, decline of income from free-TV licences and the impact of the COVID-19 pandemic. (BFI, 2022d). Thus, the escalated cost of production and reduced consumption in cinemas have resulted in a further decline of the profits to be made producing British independent films.

The second crisis evident at the end of the BFI's 2017-2022 five-year plan is the skills shortages in the UK film and TV industry. *BFI Skills Review 2022* notes that "the rapid growth in production, coupled with retention issues have exacerbated a shortage of skilled crew. The Review reiterates what has been reported for some time, that crew shortages are negatively impacting productions, which includes crew being promoted too early and without the necessary support, leading to increasing levels of stress on set." (BFI, 2022c). Indeed, the boost of inward investment for film and high-end TV has increased the need for a large and highly skilled workforce, while Brexit and the COVID-19 pandemic have caused the loss of skilled crews in the industry. "The post-Brexit points system immigration system has, by design, made it more difficult for those without qualifications to move to the UK to work" (O'Carroll, 2023), while the outbreak of COVID-19 drove some skilled workers out of the industry.

The lack of crews and the resulting increase in production budgets will make the UK film and TV industry less sustainable. Ben Roberts notes that, "The UK is a trusted global production hub, home of world-class crew, state

of the art studios, an incredible roaster of creative talent, all of which is underpinned by attractive tax reliefs.” He recognises that “This has enabled our industry to thrive,” but adds that “we must invest in and protect all those elements to ensure it can continue to grow and that the whole of the UK can benefit.” (BFI, 2022c). Roberts clearly recognises that inward investment has contributed to the development of the industry, however, certain interventions from the government and the BFI are required to protect the independent film sector, as well as to solve the skills issues more widely.

The third crisis facing the film industry at the end of the the BFI’s 2017-2022 plan is in regional development. As discussed in Chapter 3, the UK’s nations and regions have long been highlighted as having a vital role to play in the development of national cinema, and have been promoted in various ways by the BFI and other screen agencies, including now the new Creative UK body, which was formed in 2021 by a merger of Creative England and the Creative Industries Federation. The BFI’s 2020-21 Report notes that the shoot spend completely outside London and the South East decreased to 22% of overall national spend, in contrast to 41% in 2018 and 33% in 2019. (Finance Committee, 2021). This result could also be seen as a consequence of the first two crises, as due to the increase of inward investment, there are fewer skilled crews available on the market and fewer independent filmmakers can afford to produce films, meaning that inward investment films continued to dominated the market and the main studios in London and the South East.

Under these circumstances, it is interesting to note that the BFI intends to facilitate a merging of private capital and public funding, in order to deliver the BFI’s goal to “support a greater geographic spread of inward investment production in the UK” (BFI, 2017d). The way that Netflix has been encouraged to invest in UK productions is a case in point. As *Deadline* (2022) reported “Netflix is joining forces with Creative UK, the independent network for the country’s creative industries, on an initiative that will develop and fund debut feature films. Dubbed ‘Breakout’, the programme will support emerging filmmakers, with at least one feature project set to receive a production budget of approximately £1.5M (\$2M) as well as a guaranteed berth on Netflix.” Hannah Perks, Netflix head of content acquisitions for the UK, commented “We know there are so many brilliant emerging genre voices in the UK with bold, ambitious stories to tell who lack the funding to reach their audience. We’re committed through our UK features initiative to creating a talent pipeline

for Netflix and the wider industry to elevate and develop the widest range of voices.” (Tabbara, 2022b). However, it is worth noting that iFeatures, which was first launched in 2009 by UK regional agency South West Screen and BBC Films and run by Creative England. (Grater, 2020). This program, supported by the BFI, BBC Films, and ScreenSkills, aimed to support the development of low-budget feature films. Each round of iFeatures selected 12 projects to undergo a development cycle, with three projects eventually produced at a relatively low budget. With each round selecting 12 projects that participated in a development cycle before three were produced at relatively low a budget, the iFeatures was also renowned for the success of the Bafta-nominated *Lady Macbeth* and 2017 Toronto premiere *Apostasy*, as well as two titles in 2019’s Cannes Great 8 showcase. (Grater, 2019). Unfortunately, the program was temporarily paused during the COVID-19 pandemic in 2020. In this respect, the investment from Netflix could be seen as an alternative means of supporting indigenous film productions, filling the void left by the temporary halt of iFeatures.

There is no denying that some inward investors, such as Netflix, are capable of and motivated to support emerging independent filmmakers by providing the training programme, production support and distribution platform. Netflix claimed in 2021,

The South West of England has emerged as a rich creative hub for Netflix giving rise to breakout hits including *Bridgerton*, *Rebecca* and *Our Planet*...These local stories don’t just entertain our members around the world — they also benefit the communities in which they’re made. Over the last two years, Netflix productions filmed or produced in the region have generated over £132m for the UK economy, and created more than 1,000 jobs. (Netflix, 2021).

In this case, Netflix has benefited from one of the UK’s regional creative hubs, while the investment in the regions and nations has contributed to the film economy and employment.

Furthermore, at the UK Parliament Inquiry of 2019 and 2020, the delegation from Netflix expressed their plans to contribute to the film and TV industry in the nations and regions. Anne Mensah (2020), Vice President of Original Series at Netflix, highlighted, “I think in the UK regional diversity is key to a healthy creative infrastructure. At the moment, that diversity tends to

be around our filming bases.” The partnership with Netflix represents a clear relationship to policy and a new version of Creative UK, especially through the partnership with Creative UK. Creative UK (2022) claimed “Our work in Support is primarily public funded from various partners across the UK and are completely accessible for anyone who meets the eligibility criteria...Our regional programmes are created with partners to support the development and growth of creative businesses in the regions.” Creative UK’s programme has therefore supported the nations and regions not only using the public funding available, but also with the help of the Netflix investment, as a form of inward investment.

While inward investment has contributed to the film economy in the UK, it has threatened the independent film industry indirectly and inevitably, the increase of inward investment projects resulted in the escalation of budgets and the shortage of skilled crews. In these circumstances, certain interventions from policymakers are expected. Indeed, the independent sector will require further support from UK public funds. At the same time, given that they have significantly benefited from the tax incentives and the UK’s creative hubs, inward investors should be expected to share the obligation to support the socio-cultural aspects of the film and TV industry, in terms of offering skills training and supporting diverse regions. I shall return to this topic in Chapter 7 and the conclusion.

4.6 Conclusion

I have discussed contemporary UK film policy from 2010 to the present in this chapter, noting that it consists of two key aspects: the government’s policies and the BFI’s strategies. The two aspects are intertwined and are supposed to support the UK film and TV industry integrally.

One crucial part has been the government’s economic film policy, as developed by the DCMS and the Treasury. In this case, the tax relief policy, the shape of which was refined by the previous Labour Government and revised by the Conservative Government, has been the most important government policy impacting on the film and TV industry. By offering tax incentives, the policy has attracted significant US inward investment and contributed to the UK film economy. However, the increasing inward investment has failed to provide sufficient socio-cultural support to the UK film and TV industry. In

particular, it has threatened the viability of independent productions.

Meanwhile, the BFI has successfully become the lead strategic body of the film industry, replacing the UKFC and taking on both economic and socio-cultural roles. The key economic responsibilities of the BFI are to allocate the lottery funding and administer the Cultural Test, on behalf of the government, while its socio-cultural responsibilities include providing skills training, education, access to film culture and promoting diversity and inclusion. There is no denying that the BFI has been able to effectively guide the industry, but there have been certain challenges at the current stage.

In this period, first, despite the BFI's efforts, the independent sector has failed to thrive due to the lack of profitability and the threat from inward investment films, resulting in a shortage of skilled workers and increased budgets. The disparity in the amount of money that spent on inward investment projects and are available for independent productions is also increasingly large. For instance, in 2021, the inward investment spend on film was £1.27 billion (BFI, 2022e); in contrast, "the 10 biggest recipients of production funding from the BFI in 2021 received a total of £8.87m in support." (Tabbara, 2021a).

Second, the BFI's diversity policy has not significantly improved diversity and inclusion in the film and TV industry as a whole, not merely because the BFI Diversity Standards are not as strict as they appears to be, but also because the diversity rules are not applied to inward investment film productions.

By analysing the BFI's less successful measures of supporting the independent sector and promoting diversity and inclusion, it is clear that inward investment, which is encouraged by the government, has become an obstacle to the BFI achieving its goals. In this context, the government's policy is not in line with the BFI's measures, and vice versa. While the BFI pioneers to recognise the changes in the industry and in British culture, and thus improves its strategies every five years, the government's policymaking rather lags behind. For instance, the requirements to pass the Cultural Test are still largely oriented toward the economic perspective, aiming to attract further inward investment. However, in order to maintain a sustainable UK film industry and enable the UK to remain an attractive creative hub for international investors, the government is expected to be more forward-looking and make more of an effort to support independent filmmakers and create a diverse culture.

While I will present more proposals of policymaking at the end of the thesis, I shall also explore the BFI's other focuses and its leadership in the following chapters, concerning the BFI's international strategy and the measures introduced during the COVID-19 pandemic.

Chapter 5

The British Film Institute's international strategy for the UK film industry since 2010

As I have noted in Chapters 3 and 4, the UK film industry has cooperated with the US and European countries from its earliest stages. In the contemporary era, the government's tax relief policy has attracted significant US inward investment. On the one hand, the UK film industry has developed a more intertwined relationship with the US inward investment through the government's tax relief policy; on the other hand, the geo-political changes, such as Brexit, have inevitably affected the cooperation between the UK and European countries. In addition, the shifts in China-UK political relations over the last decade also affected UK film industry's engagement with the world's second-largest film market.

While the UK still remains one of the leading cinema markets worldwide ([Statista, 2023](#)), it is essential to examine the development of the UK film industry on the global stage under the leadership of the BFI. As the lead strategic body for the UK film and TV industry, the BFI has clearly valued the international opportunities for the UK filmmakers. Its international strategy, initially produced as part of the BFI's first five-year plan, demonstrated that the international development of the UK film industry dose not only had economic benefits, but also could achieve socio-cultural impacts and represent the nation's soft power.

This chapter discusses the BFI's international strategy for the UK film

industry since 2010. I shall first examine the different stages of the BFI's international strategy, as international co-production has been one of the BFI's prioritised international strategies. Subsequently, I examine different types of cross-cultural film collaborations, analysing China–UK and UK–Australia film co-productions as case studies to examine what factors contribute to profitable international co-production projects.

Finally, the UK film industry's international development in the post-Brexit era is also noteworthy. Following the UK's withdrawal from the Creative Europe, the establishment of the Global Screen Fund (GSF) in 2021 represented a new vision of the government's and the BFI's international strategy. I shall analyse the GSF's goals and its measures with the aim of supporting UK films in reaching the international market. I also bring to bear on this discussion an array of first-hand materials, including interviews with persons in charge of the GSF to complement the research into the newly established fund and to investigate whether the GSF might be the key to the global promotion of UK film and TV in the post-Brexit era.

5.1 Three stages of the BFI's international strategy

Businesses typically implement international strategies as a means of realising their global expansion goals. For example, Netflix localises its content based on local user tastes and big data analysis as part of its strategy for international expansion. (Iordache, Raats, & Afilipoaie, 2022, p. 240). The BFI initially proposed the adoption of an international strategy in 2012, and its approach has evolved over the past decade. Herein, I examine this strategy in three distinct stages. In the first phase, from 2012 to 2017, the BFI focused on several priority areas to increase international cooperation. The second phase (2017-2021) was a transitional period for the BFI's international strategy, in which the BFI continued and strengthened their existing policy, but also prepared the way for the policy they would roll out in the third phase, including taking on board the implications of Brexit. This third phase started in 2021, with the BFI eliminating the prioritised countries strategy, seeking wider global collaborations for the industry and working with the government on a new Global Screen Fund. As of 2022, the UK has 14 active bilateral co-production treaties with 12 countries, including agreements with Australia, Brazil, Canada, China, France, India, Israel, Jamaica, Morocco, New Zealand, the Occupied Palestinian Territories, and South Africa. All of these treaties

were negotiated by the BFI with support from the UK Government's Department for Culture, Media and Sport (DCMS).

The first five-year plan *Film Forever* may be regarded as setting the agenda for the first stage in the development of the BFI's international strategy. In this period, the BFI stated that its international strategy was aimed at assisting the UK film industry to achieve "maximum economic growth and cultural reach" (BFI, 2012b). As part of *Film Forever*, the BFI published *The Wide Angle: an international strategy* in 2012, built on a previous report the BFI had commissioned from Olsberg SPI. While the BFI acknowledged the global character of the film industry in *The Wide Angle*, it has also argued that "global reach needs local strength" (BFI, 2012b). In this respect, the BFI categorised its target territories into three tiers as a means of determining which should be prioritised for active engagement through its international strategy.

Tier One comprised the USA, China and Brazil, which were recognised as the most important territories for the film industry to target, owing to their "having the greatest convergence across all areas of the strategy, where there was the greatest evidence of opportunities for growth, and where public intervention could unlock opportunities and effect change." (BFI, 2012b). Germany, France and Australia form Tier Two and were categorised as such in the belief that "the UK's current strong key relationships and ongoing engagement with these territories – across all areas of the International Strategy – should be supported." (BFI, 2012b). Finally, the Tier Three countries include the Nordic countries, Ireland, Russia, India, South Africa, Japan, South Korea, Turkey, and Canada. Tier Three "represents a number of territories where the UK already has an existing and productive relationship and where consolidation and growth is possible for some of the sectoral objectives." (BFI, 2012b).

The UK aimed to engage with these countries across all three tiers by taking strategic actions, including the support of "audiovisual policy, co-production, cultural exchange, export, inward investment, and skills and talent." (BFI, 2012b). Clearly, the BFI's strategy group included both economic and socio-cultural initiatives and impacts in their thinking. Thus the support of co-production, export and inward investment aimed to increase British films' share in global markets and support economic growth in the UK. Meanwhile, the strategy was also intended to support cultural exchange and offer a greater

diversity of films to UK audiences, in addition to promoting British film among international audiences.

Although the second stage of the BFI's international strategy (2017–2021) showed no distinctive differences from the first stage, it was, to some extent, a transitional period for the BFI's international strategy. The BFI's second five-year plan, *BFI 2022*, published in 2017, issued the following claim, "We will increase the International Fund to lead a refreshed and strengthened International Strategy in partnership with the British Film Commission and the Department for International Trade." (BFI, 2017b). In this context, as the British Film Commission (BFC) has its offices in the UK and the US, its role has been to "maximise and support the production of international feature film and television in the UK." (BFC, 2022). Declared in *The Wide Angle*, the BFI International Fund had "committed £200k per annum to support the BFC to attract film inward investment from the US." (BFI, 2012b).

From 2017, the focus of the BFI's international strategy was not significantly changed; rather, the government committed to providing further support to ensure that the strategy remained as it had been. While the absence of modification could be interpreted as indicating that the BFI was wholly satisfied with the international strategy launched in 2012, it may have been difficult for the BFI to implement following the EU referendum in 2016. Josh Berger and Amanda Nevill, the BFI's Chair and CEO, respectively, said in their introduction to *BFI2022*, "We know that ensuring the best possible outcome for film following the upheaval of the European referendum will be a major priority for the BFI, one which will entail new resource and expertise, as well as renewed energy to flourish in markets outside the EU." (Berger & Nevill, 2017). Berger and Nevill (2017) also highlighted possible future developments, noting, "There is growing international competition, and in the post-referendum world we know we have to up our game to sustain and grow further the UK's position."

The third stage of the BFI's international strategy began in 2021 and marked a turning point in the BFI's strategic development as Brexit took effect in January 2021. Brexit has significantly altered the interaction between the UK and EU with respect to business, travel and cultural exchange, all of which is clearly applicable to the film industry, which was scarcely prepared or protected by the government. According to a report in *The Guardian* (2021), "MPs at the Digital, Culture, Media and Sport commit-

tee hearing told DCMS minister Caroline Dinenage that her department was treated as an “afterthought” by the government, and that during Brexit negotiations the creative industries were not prioritised, despite their accounting for about a quarter of the UK’s economy.” Under these circumstances, it was difficult to formulate any coherent international strategies or adopt a long-term outlook towards the future.

In the wake of Brexit, the BFI has shifted its focus on cross-cultural collaborations to the wider global context. To some extent, the BFI was re-thinking their co-production and target territories policy in stage two. The most significant shift in the third stage occurred in the BFI’s co-production strategy, as the BFI stopped promoting the three-tier country prioritisation system for collaboration. Meanwhile, the BFI aimed to revise several signed co-production treaties to facilitate smoother co-production processes and remained open to forming new treaties with other countries only if the treaties would make the co-productions more profitable for British filmmakers. As Neil Peplow, Director of Industry and International Affairs at the BFI, explained in an interview,

The reason we have not taken the prioritised territories approach is that, we found that you can’t discount opportunities you are unaware of, you can’t make assumptions of opportunities you think that were not there, also, it is very excluding, if you are not on that list, you feel like there is no point of engaging, and actually, we are open to collaborate with any country, with any filmmaker and explore what all the possibilities are, before we shut them down. (Interviewed by the author, 2022c).

In fact, what Peplow observed was not the exclusive reason for the strategic changes; his explanation also reflects an attitude of inclusivity directed towards the international marketplace. Moreover, the changes resulted from three factors. First, Peplow, who worked as a producer before becoming the BFI’s Director of International Affairs in 2019, contributed significantly to the new strategy. Peplow had been involved in the production of eighteen feature films and TV series and was CEO of the Australian Film Television and Radio School (AFTRS). His industrial background and international work experience certainly made him more pragmatic in his approach to leading the BFI’s international strategies. For example, he argued that the UK–Australia official co-production treaty, first established 30 years previously, was used

only occasionally because the treaty was not practically designed to facilitate modern co-productions.

The treaty required that 30% percent must be spent in the minority country and 70% in the majority, with such proportions, it would be difficult to undertake any modern co-productions because film-makers may have production in one country and post-production in another, and 20% is usually spent on post-production.” (Interviewed by the author, 2022c).

To enhance the collaboration between Australian and British producers, the UK–Australia official co-production treaty was revised in 2021, as reported by *Deadline*(2021), “Updated terms include allowing Australia-UK co-productions to hire staff from third-party countries more easily, while co-producers will now also be able to make a smaller minimum financial contribution towards their project in order to benefit from the treaty.” In this case, Peplow’s experience contributed to the changes made to the treaty, and his more pragmatic approach further influenced the BFI’s approach to international strategy.

The second factor contributing to the BFI’s change of policy after 2021 was that engagement with the prioritised territories had not been particularly fruitful. The Tier One countries, which included China and Brazil, were indubitably regarded as fast-growing markets in 2012, and the BFI intended to enter these markets by promoting sales and co-productions. As *The Guardian* (2016) noted,

The US remains the UK’s biggest export market, but as Isabel Davis, [BFI head of international from 2012 to 2018], explains, sales in China could soon grow significantly. “English becoming ever more widely spoken will boost sales. France and Germany remain key, but Latin America and Asia are important growth markets.” The BFI has been working with the government to encourage co-production relationships, recently organising trade delegation visits to Brazil and China.

The UK government signed official co-production treaties with China and Brazil in 2014 and 2017, with the aim of boosting the distribution of UK films in those countries. However, the dearth of China–UK and UK–Brazil co-productions remains puzzling. Few official or non-official China–UK film

co-productions have been released since 2014. To date, only one feature film and one documentary have been released. *Earth: One Amazing Day* is a documentary co-produced by the BBC and Shanghai Media Group which received a final certification of co-production from the BFI in 2017. The documentary generated \$81,345 in the UK, while the international gross was \$12,770,195, of which \$7,181,262 came from China. (Box Office Mojo, 2017a). The feature film, *Special Couple*, co-produced by UK-based Zephyr Films and Chinese production companies Dimension Films and the Shanghai Media Group, was scheduled for release in 2019. However, as a result of the COVID-19 pandemic and the associated disruption, the film was only released in mainland China in 2021. Unfortunately, the film was not a box office success, with a gross estimated at \$1,673,271, (Maoyan, 2021). Meanwhile, the film gained a poor score (3.5 out of 10) on Douban (Douban, 2021), a Chinese review-aggregation website for film and television. The case of China–UK co-productions will be analysed in greater depth later in this chapter. Suffice to note here that an official treaty and the efforts of co-production could not guarantee the success of a cross-cultural collaboration.

Additionally, the official treaty has not been applied to any UK–Brazil co-productions since its ratification. However, the UK and Brazil did co-produce a pioneering feature film, *Trash*(2014), before the treaty was officially formalised. Kris Thykier, a co-producer working with London-based PeaPie Films, recalled, “This was a situation where the film was as much driven from the production side as the creative side.” (Hopewell, 2013). Andrea Barata Ribeiro, at Sao Paulo’s O2 Filmes, also described the film as a ‘true co-production’ (Hopewell, 2013). To access the Brazilian tax-break, the film was required to be an official co-production, as result,

Filmes set up “Trash” as an official co-production with Universal in Germany, which does have a bilateral pact with Brazil, Barata Ribeiro explained. Universal in turn co-produced “Trash” with the U.K. under the aegis of the Council of Europe Co-Production Treaty. Sheeraz Shah, Working Title head of legal and business affairs, led the co-production structure on the U.K. side. Equity broke down as the U.K. (50%), Germany (25%), and Brazil (25%). (Hopewell, 2013)

Presumably, this complicated set of arrangements would have been much easier if the UK had already signed the UK-Brazil co-production treaty. The film was

nominated as BAFTA Award for Best Film Not in the English Language in 2015, however, the film's worldwide box office was only half of its production budget. ([The Numbers, 2015](#)). This example demonstrates that UK–Brazil co-production endeavours had controversial results at its early stage.

In this case, collaboration between British and Brazilian filmmakers was operated as a bottom-up cooperation. While the British and Brazilian filmmakers' had willingness to collaborate, the lack of experience or commercial success may explain why the co-production treaty's signing in 2017 failed to effectively boost UK–Brazil co-productions. Distinctive from the UK–Brazil co-production mode, China–UK co-productions represent a top-down approach, as treaty had been signed before any co-production had taken place. Despite the BFI's diligent efforts to establish networks, including signing co-production treaties, relations with the prioritised territories, such as China and Brazil, have not yet lived up to expectations.

The third factor contributing to the changes to the BFI's international strategy after 2021 was the geopolitical changes that had taken place since the priority territories had been identified in 2012. The political relationship between China and the UK went through turbulence since the co-production treaties was signed. The honeymoon between China and the UK began with David Cameron's visit to China on a trade mission, holding talks with China's President Xi Jinping in 2013. In 2018, China and the UK reached their "golden era", As Nigel Walker ([2020](#)) notes in the Parliament report,

Prime Minister Theresa May visits China on a trade mission and meets China's premier Xi Jinping. To mark the visit, Liu Xiaoming, China's Ambassador to the UK, writes in the Daily Telegraph, describing this "Golden Era" of China-UK relations.

However, matters relating Hong Kong, Xinjiang and Huawei increased the tensions between two countries since 2019. The government responded to the committee's report in November 2021 stated that "while it was in the UK's interests to continue to trade with China, it was "important [to] avoid strategic dependency" on the country." ([Tudor, 2022](#)). The souring political relations between China and the UK inevitably affected the cultural exchanges between two countries, as well as the BFI's international strategy towards China.

Meanwhile, Brexit and Europe's increasing cultural protectionism have created a challenging international political environment for the BFI, which was eager to sustain its cooperation with the EU following the EU referendum.

The UK government signed the revised EU Convention on Cinematographic Co-production in 2019, which permitted more than three co-producers established in three different Parties to co-produce cinematographic work. The Convention also encourages the involvement of co-producers that are not established in such Parties. ([Secretary of State for Foreign and Commonwealth Affairs, 2020](#)). While the BFI ([2022j](#)) claims that “this demonstrates the UK’s determination to continue working very closely with Europe and other international territories.”, the revised Convention demonstrates that bilateral co-production treaties have been insufficient in supporting co-productions in Europe. The new regulation was intended to involve more countries both within and outside the EU, thus allowing greater freedom of movement between countries for capital, technology and talent. Neil Peplow further argues that the UK’s position outside the EU trading bloc offers an opportunity for engagement with international networks. Meanwhile, it will be more important to maintain the European networks more industriously if the UK wishes to continue collaboration with the EU. ([Interviewed by the author, 2022c](#)). In this sense, instead of driving the UK film industry away from the Europe, Brexit has urged the BFI to invest greater effort in securing its relationships with European film industries.

Despite the BFI’s efforts, significant changes are likely to manifest in film exports to the EU. According to the BFI ([2019e](#)), the leading export destinations for UK films between 2013 and 2017 were the EU (38.5%) and the USA (35%). In addition, UK content dominates in the European TV channels: “the UK provides half of the European TV content presence of VOD in Europe and the UK works are the most actively promoted on VOD” ([Boffey, 2021](#)). However, *The Guardian* ([2021](#)) noted that “The EU is preparing to act against the “disproportionate” amount of British television and film content shown in Europe in the wake of Brexit, in a blow to the UK entertainment industry and the country’s ‘soft power’ abroad.”

Clearly, the EU has been increasingly concerned about the homogenised content that is made available via the growing streaming platforms and has implemented protectionist measures with the intention of promoting cultural diversity. Although, to date, the EU has not taken targeted action and UK audiovisual content continues to qualify as European work, the above report in *The Guardian*, referring to the European Convention on Transfrontier Television of the Council of Europe, certainly caused fear in the UK industry, as

The Guardian (2021) reported:

Industry figures said a move to define UK content as something other than European, leading to a loss of market share, would particularly hit British drama, as the pre-sale of international rights to shows such as *Downton Abbey* and *The Crown* has often been the basis on which they have been able to go into production.

In this context, the EU has been an essential destination for UK and TV exports, and it would be devastating for UK film industry if its market share in the EU were largely reduced.

In the past decade, therefore, the development of the BFI's international strategy has undergone three phases. While the BFI's goal has always been to promote the UK film industry as a global business, its priorities have shifted from cooperating with newly growing film markets to establishing partnerships that have a global scope. Furthermore, new challenges that have emerged in the wake of Brexit have precipitated strategic changes in the BFI's approach to international affairs. The production of successful international co-productions and the promotion of UK film and TV on the global stage have become key tasks for the BFI in its current stage.

5.2 The different types of co-production

Both official and unofficial co-productions can be defined in economic terms, according to the different financial contributions of the companies and/or countries involved. But co-productions can also be defined in terms of the creative motivations for developing them. Morawetz et al. (2007) and Mette Hjort (2009) have both developed typologies that are very useful for understanding the range of co-production activity from the perspectives of both economy and culture.

The typology developed by Morawetz et al. identifies three types of co-production. First, the authors use the term 'true love' to describe a co-production driven by creative motivations. Second, a co-production driven by the search for finance is described as a 'marriage of convenience', in which a film is structured as a co-production to pool financial resources from different countries, while creative elements are adjusted in order to raise finance. Marriage-of-convenience co-productions can also be referred to as market-driven. The third type is an 'arranged marriage', which describes

a co-production driven by international capital, with the film formally structured as a co-production to exploit tax credits. (Morawetz et al., 2007, p. 426). Official co-production treaties between different countries often share similar purposes to ‘arranged marriages’ from an economic perspective.

From both cultural and economic perspectives, the concept of co-production is intertwined with the concept of transnational cinema. Will Higbee and Song Hwee Lim (2010) note that “the term “transnational” is, on occasion, used simply to indicate international co-production or collaboration between technical and artistic personnel from across the world.” (p. 10). Hjort develops this further from a cultural perspective, and proposes a typology that includes “epiphanic transnationalism, affinitive transnationalism, opportunistic transnationalism, [and] globalizing transnationalism” (Hjort, 2009, p. 17). These concepts are all versions of cinematic transnationalism, but also work as a means of describing co-production activity. In epiphanic transnationalism, the emphasis is on the “cinematic articulation of those elements of deep national belonging that overlap with aspects of other national identities to produce something resembling deep transnational belongings.” (Hjort, 2009, p. 17). Affinitive transnationalism “centres on the tendency to communicate with those similar to us.” (Hjort, 2009, p. 17).

Both epiphanic and affinitive transnationalism arrangements share something with Morawetz’s concept of true-love, creative-led co-productions. While most of the categories in Hjort’s typology tend to focus on the cultural aspect, not all are resistant to economic thinking. She uses the term opportunistic transnationalism, for example, to describe co-production activities that respond to economic opportunities, which will often overlap with other types of transnationalism, particularly in the co-production situations that the UK and the rest of Europe face. It is this sort of economic opportunism that Morawetz et al’s concept of marriages of convenience co-productions indulges in. Meanwhile, globalising transnationalism “often finds a starting point in the putative inadequacy of national sources of film finance and makes transnational appeal oriented asymptotically towards global appeal the mechanism for recuperating the high costs of supposedly unavoidable international co-productions.” (Hjort, 2009, p. 21). This version of transnationalism is perhaps closest to the co-production arrangements that Morawetz et al describe as arranged marriage.

Thus, although Morawetz et al. and Mette Hjort phase the types of

transnational co-production differently, their ideas complement each other in their economic and cultural aspects and overlap at times when applied to the history of British co-productions. Therefore, in the following analysis of the UK's co-production in the BFI's era, both typologies are drawn upon to present an integrated understanding of how co-productions work.

Based on Morawetz et al. and Mette Hjort's theories, the following sections will examine official China–UK film co-productions and official Australia–UK co-productions as examples that can shed light on the extent of the role that official co-production has played in the BFI's international film strategy. By analysing and comparing the examples of China–UK co-production and Australia–UK co-production, I also discuss the factors that are most likely to contribute to a successful co-production.

China and Australia are good examples for analysis in terms of the BFI's strategy towards co-production and global reach, because China was listed among the Tier One priority countries in BFI's 2012 international strategy while Australia was listed in Tier Two. In addition, China represents a growing market but simultaneously has a culture and ideology that differ dramatically from those of the UK. By contrast, as a former British colony, Australia's cultural background is similar to that of the UK and the country has a long history of cooperation with the UK film industry; however, whether the Australian market could contribute to the international distribution of UK film culture is questionable.

To a certain extent, China and Australia represent two types of partner with the UK in the BFI era, and these co-operations present the UK film industry with both opportunities and challenges. Therefore, I will not only detail the BFI's policymaking with respect to co-production, but also focus on the perspectives of China and Australia by introducing their domestic film policies and discussing their own interests in co-production. Furthermore, I use co-produced films as case studies to examine whether the UK film industry could deliver successful co-productions with these countries in the future and to assess the possible patterns that these official co-productions might follow as part of the BFI's international strategy. As such, studying these examples is intended to help the BFI explore new partnerships and maintain existing ones after the Brexit.

5.3 China-UK co-production

As I noted earlier, China–UK co-production has not been a success. However, beyond acknowledging the lack of success of China–UK co-productions, it is also important to explore the potential motivations for co-production between the UK and China and the reasons for failure. Thus, I shall examine the drive for co-operation between China and the UK from the perspectives of the Chinese and UK governments, as well as from that of the film industry, particularly its investors, producers and distributors.

China had become the world’s second-largest film market just before the outbreak of the COVID-19 pandemic, and the co-production treaty between China and the UK had in principle brought unprecedented opportunities to both China’s and the UK’s film industries. Aside from collaborations between film industries driven by creative or financial motivations, the China–UK co-production treaty has focused on promoting official co-productions that would qualify for tax relief in the UK and would be treated as domestic films in China. The collaborations between China’s and the UK’s film industries are thus ‘marriage of convenience’, as well as ‘arranged marriage’ in Morawetz et al.’s typology. However, the creation of co-productions remains challenging. Both China and the UK anticipate economic rewards from the co-production treaty. From the UK perspective, the treaty provides opportunities for companies seeking access to the increasingly significant Chinese film market. Meanwhile, the Chinese film industry is seeking benefits from the ability to distribute Chinese films more effectively in foreign markets.

However, film co-productions between China and the UK are not merely collaborations between production companies; they are also collaborations between the British and Chinese cultures. These cultures differ in regard to cultural values, political ideologies, storytelling styles and business attitudes, and some of the stances that these cultures adopt on these values are in polar opposition to one another. The treaty also promotes China’s cultural policy, which encourages filmmakers to tell China’s story globally with the aim of enhancing China’s soft power.

I looked at the history of co-production policy and practice in the UK in Chapter 3. By contrast, the history of co-production in China’s film industry is relatively short, particularly in comparison with that of the UK, and although the Chinese film industry played no part in early European or American co-productions. However, the scale of Chinese co-production has increased

rapidly in recent years. Co-production with China began in the 1950s, that is, during the early years of the Republic of China, which was founded in 1949. In this early stage of co-productions, mainland China had only a small number of co-productions with Hong Kong and one co-produced film with France. These co-produced films had more focus on cultural perspectives, representing Hjort's terms of epiphanic and affinitive transnationalism. As such, the films co-produced with Hong Kong were largely period costume operas, and mainland China usually played the dominant role in their production to assume control of the content and artistic styles. However, for political reasons, co-productions were suspended during the late 1960s and 1970s. (Zhao, 2018, p. 5).

As part of the Chinese economic, cultural and political reforms initiated in the 1970s, the China Film Co-production Corporation (CFCC) was established as a special organisation solely authorized in 1979 by the State Administration of Press, Publication, Radio, Film and Television (SAPPRFT) to administer affairs relating to Chinese-foreign film co-productions. Since then, the CFCC as a representative of the Chinese government has been in charge of assessing and approving international co-production applications and conducting reviews of completed co-production films. Prior to 2000, there were very few co-productions, and those that did occur were collaborations between mainland China and Hong Kong or Taiwan. As Miao Xiaotian (2015), the current Vice President of the CFCC, recalled, "the first equally co-produced film after the CFCC was founded was *The Go Masters*", which was co-produced with Japan and released in 1982. Miao also recounted the rapid evolution of China's co-production market from 2000 on wards, when the film industry underwent a dramatic shift from a policy-controlled to a market-driven approach. This reflected that China's co-production type shifted from 'true love' only to 'marriage of convenience' and 'arranged marriage'. Miao explained,

The numbers of co-production projects submitted to CFCC grew from 10 in 2001, to 40 in 2003...Once China joined WTO, the government allowed non-government capital and foreign capital to fund joint production companies in China, as long as the shareholdings of the Chinese part were over 50%. (Qin & Kang, 2015)

The CFCC announced at the 2020 annual Beijing International Film Festival (BJIFF) that the total number of films co-produced between 1979 and 2019 was 1,127, most of which were co-productions with Hong Kong, Macao

and Taiwan . (Zhang, 2020). It was also noted that “from 2000 to the end of 2019, 244 Sino-foreign co-productions were completed and released, and there were 49 co-productions with a box office gross of over 100 million yuan in the Chinese mainland.” (Zhang, 2020). As of the end of 2022, China had signed co-production treaties with 22 other countries, clearly demonstrating the importance of the Chinese government’s policy of encouraging co-production since the 2000s.

China’s co-production endeavours are economically and politically driven. For instance, co-productions between mainland China and Hong Kong, Macao or Taiwan take place at the intersection of affinitive and opportunistic transnationalism, in Hjort’s terms, as they preserve a cultural affinity and have economically benefited the box offices of both mainland China and the other territories. In addition, while the US and China do not have an official co-production treaty, the finance-driven Chinese-American co-productions are also increasing in number. For example, 2016’s co-produced animated film *Kung Fu Panda 3*, co-produced by the China Film Group, DreamWorks Animation and Oriental DreamWorks earned \$521 million in cumulative global gross revenue. (Box Office Mojo, 2016b). 2017’s *Wolf Warrior II*, co-produced by Beijing Dengfeng International Culture Communications Company, Spring Era Films Co. and Jetsen Cultural Industry Group , another US-China co-production, sold only modestly in the US and internationally, but did historic business in China, where it earned \$854 million, (Box Office Mojo, 2017c) and became the second highest single-market gross in global film history.

Unfortunately, finance-driven co-productions that transcend cultures are not guaranteed success. *The Great Wall*, co-produced by Legendary East, Atlas Entertainment and China Film Group, directed by the famous Chinese director, Zhang Yimou, generated only a little more than \$170 million at the box office in China and another \$45 million in the United States, with a cumulative global gross of \$334 million. (Box Office Mojo, 2016a). However, “the movie cost 150 million dollars to produce... coupled with its massive marketing costs.” (Shi, 2018), even even China’s state news *Xinhua News* (2018) noted that “its box office take was largely considered a disappointment.”

Crucially, the Chinese government also expects that film will help to reinforce China’s soft power. As Antonios Vlassis (2016) notes that “China [also] seeks to play an increasing role in the international cultural arena to advance its political agenda.” (p. 486). Yanling Yang (2016) adds that “China’s

decision makers have deployed film to spread China's cultural soft power... [and] consider cinema to have great potential to promote China's soft power overseas." (p. 18). Consequently, the film industry has attracted increasing attention from the Chinese government for its significant role in influencing the social perception both at home and abroad. Yang also notes China's "Going-Out Policy", which is China's current cultural and economic strategy to encourage its enterprises to invest overseas and promote soft power, "is in line with the historical trajectory of China's film policy, in that it is fully controlled by the government and retains film's political propaganda function." (Yang, 2016, p. 18).

Xi Jinping, China's president, first raised the idea of promoting "China's story" internationally in 2013, during the National Conference of Publicity. (Xinhua Net, 2013). "China's story" has become a key phrase that suggests a positive global image of China and Chinese culture, and Xi has highlighted the importance of telling China's story to the world during various national and international events since 2013, affirming the Chinese government's ambitions of enhancing China's global impact through the exertion of soft power.

Several countries involved in China's 'One Belt, One Road' initiative – such as Kazakhstan, Tajikistan and Estonia – have also signed co-production treaties with China. (Sacks, 2021) (Liu, 2020). While some co-produced films may be embraced by the Chinese authorities, they may lack the appeal required to win over the international or even the domestic film market. *The Composer* (2019), for instance, co-produced with Kazakhstan as political propaganda, follows the true life story of one of China's greatest composers, Xian Xing hai, and his friendship with Kazakh composer Bakhitzhan Baykadamov during the Second World War. The film was well received by China's mainstream media, with *Xinhua News* (2019) commenting that "the film has provided a good example for international communication." However, the film was seemingly aimed at reinforcing the political bond between the two countries rather than at box office success, and Box Office Mojo recorded a total gross revenue of a mere \$649,703. (Box Office Mojo, 2019b).

The paradox encapsulated by such films reflects the contradictory purposes that drive China's co-production projects, with the various co-production treaties signed since 2000 being driven by both market considerations and political goals. These treaties demonstrate that China's co-production films at the current stage are mostly in Hjort's terms of opportunistic transnationalism

and globalizing transnationalism, and what Morawetz et al. have described as ‘marriage of convenience’ and ‘arranged marriage’. On the one hand, China’s film market has grown impressively within a short frame of time, and Chinese film production companies have attained greater freedom, allowing them to compete in the international market. Several successful co-productions with Hong Kong and the USA have demonstrated an encouraging co-production market within China. On the other hand, some co-productions are intended more to serve the government’s political agenda, which can limit their box office success and render such arrangements less appealing to potential co-production partners.

The signing of the China-UK Film Co-Production Agreement in 2014 needs to be understood in the context of both Chinese and British film policy, so this brief history of Chinese co-productions forms an important backdrop to the treaty. It is also worth noting that China’s film co-production treaties often follow trade investment, and the China-UK treaty was formalised after the UK Prime Minister, David Cameron, visited China with more than 100 UK business leaders on a trade mission in 2013.

China continued to figure prominently in UK economic policy in subsequent years. Thus in 2019, the Creative Industries Trade and Investment Board (CITIB) identified five key strategic markets which they argued should be prioritised for government and industry export support, and China was one of those markets, along with the USA, Europe, the Middle East and Japan. According to CITIB, “these key markets include territories offering large opportunities for growth over the next few years as well as mature markets ideal for British businesses to begin exporting for the first time.” (CITIB, 2019).

Economically, the China–UK co-production treaty does not differ significantly from the co-production agreements that the UK has with other countries. In parallel to the economic goals of such treaties, the BFI’s cultural goals also play a significant role in relation to China–UK co-production. According to the BFI, co-production agreements are “meant to encourage cross-cultural collaboration between filmmakers.” (BFI, 2019b). This phrase to some extent echoes Hjort’s concept of epiphanic transnationalism; it is, however, different from the epiphanic transnationalism promoted by European filmmakers in the early years of co-productions, with China-UK collaborations carrying a more ambitious cultural goal. One of the goals of cross-cultural co-production for the BFI and others is the promotion of cultural diversity, which would

enable filmmakers and audiences who are accustomed to a certain way of seeing and understanding the world to develop empathy for other cultures. The BFI (2017d) also believed that “a strong network of partnerships will be key to promoting the value of the UK’s world-class film talent. [The BFI] know that international cultural exchange activities reap strong rewards for the UK, such as the UK’s co-production treaty with China.”

Whereas the BFI promotes international collaboration in terms of cultural exchange, the government has demonstrated a strong desire to export cultural products as a means of boosting the UK economy, echoing the government’s policy towards creative industries. As the Industrial Strategy White Paper of 2018 put it “the creative industries – including film, TV, music, fashion and design, arts, architecture, publishing, advertising, video games and crafts – are an undoubted strength of our economy; indeed, they are at the heart of the nation’s competitive advantage.” (HM Government, 2018, p. 2). The UK also aims to greatly expand its trading ambitions abroad, with the White Paper stressing that “if we can get the conditions right and the creative industries continue to outperform the rest of the UK economy, their exports will increase by 50 per cent by 2023, they will be worth £150bn and create 600,000 new jobs.” (HM Government, 2018, p. 3). Notably, these forecasts were made prior to the COVID pandemic.

At the same time, the Creative Industries Trade and Investment Board (CITIB) has encouraged cultural exports in order to increase national soft power in the UK’s future strategy: “The UK’s creative industries and institutions are key contributors to UK’s “soft power” abroad: our products, from film, TV and games to literature, art, advertising and fashion help to shape the UKs international image and reputation.” (CITIB, 2019). This reference to soft power illustrates the diplomatic goals of international trade treaties, in addition to the economic and cultural goals, and demonstrates that UK government policy is not that different to Chinese government policy with respect to soft power. It also indicates that the BFI’s international strategy has been devised in line with government policy. The economic goals of co-production are thus closely intertwined with the UK’s national image and its cultural goals.

Although the British government seeks to enhance its soft power via cultural activities, the British Council (2019) argues that “it is the values and culture of the UK that will give it the edge as competition intensifies” and rec-

ommends that the government step back and operate at arm's-length. This is partly to ensure that the UK government distinguishes its own involvement in UK film from China's attitudes towards the Chinese film industry, which are widely perceived in the West as overtly propagandist. Hence the British Council's recommendation that the British government does not risk the UK's national cultural reputation by using culture as an overt tool to increase the UK's soft power. The differences between the UK and Chinese ideologies and cultural strategies may well result in tensions during any film co-production activities.

One of the attraction of co-production with China is that it appears to offer a rare means by which the British film industry might secure a route into the massive Chinese market and benefit from China's current policies on imported films. As the aims of the UK's international strategy are to secure a greater share of the Chinese film market and exert a greater cultural influence globally. The Chinese government, however, strictly controls entry to the Chinese market. It has allowed foreign films to be shown in Chinese cinemas on a revenue-sharing basis since 1994, but they have also imposed a strict quota on the number of films permitted to enter the market. Since 2012, only 34 imported films annually were selected to be shown in China and share the local earnings, 14 of which were to be screened in 3D or IMAX formats. (Parish, 2017).

As the number of cinemas in China increased rapidly, the policy of allowing just 34 imported films annually could no longer satisfy either audiences or the market. Therefore, a new means of accessing the market was established, involving the payment of a flat fee to producers by Chinese distributors, also known as a 'buy-out'. This now applies to films not chosen under the import quota regulations. As Parish (2017) notes, "Chinese distribution companies can negotiate a fixed price with the film's producer for local rights, and after the payment is made, the Chinese distributor keeps all of the Chinese revenue." The flat fee is a common element in collaboration between Chinese, European and other Asian film production companies as a means by which to avoid the intense competition from Hollywood for quota places.

In the context of these two distinctive Chinese films import mechanisms, British films have been less than successful in the Chinese market. Only three British feature films shown in Chinese cinemas in 2019 were revenue-sharing films and permitted through the import quota: *Yesterday* (2019), *Downton*

Abbey (2019) and *Bohemian Rhapsody* (2018). Of those, *Bohemian Rhapsody*, co-produced by the US and UK, performed best at China's box office with \$13,980,037 gross income. (Box Office Mojo, 2019a). However, compared to the film's worldwide gross of \$903,655,259 (Box Office Mojo, 2019a), these results are disappointing. No British films were exhibited in China in 2020. On the one hand, the COVID-19 pandemic and its associated restrictions affected the theatrical release of certain blockbusters – for instance, the release of the James Bond film *No Time To Die*, which had originally been due to hit screens in April 2020, was pushed back no fewer than three times. On the other hand, as part of the Communist Party's centenary celebrations, cinemas exhibited mainstream Chinese films from July to October, leaving fewer opportunities for the exhibition of British and international films. (Xinbao News, 2021).

As we have seen, while official co-productions treaties between UK and European countries were formally led by the governments, the co-production activities themselves are free from the governments' supervision. However, China-UK co-productions are subject to formal approval by the competent authorities: the State Administration of Press, Publication, Radio, Film and Television (SAPPRFT) in China and the Government Department of Digital, Culture, Media and Sport (DCMS) in the UK. Approval of an application in respect of a film is given in two stages: provisional approval in the first instance and final approval if the film satisfies all requirements. Final approval is also dependent on the content being approved by the Chinese censors, who will then grant a Film Public Screening Permit for Chinese cinemas. While China's censorship of film content is liable to criticism, censorship is applied to all films shown in Chinese cinemas, including both domestic films and imported films, in line with the imported quota and flat fee policies. Thus, co-productions are on equal terms with all other productions when it comes to Film Public Screening Permit applications.

On the one hand, the China-UK co-productions treaty offered the UK film industry an advantageous position with respect to finance and distribution. The treaty offers co-producers several strategic benefits: it exempts British producers from the Chinese quota system, such that co-productions are able to avoid severe competition with Hollywood productions in the Chinese market, where they are treated as domestic films, and are thus subject to fewer detours in their applications for Chinese distribution and scheduling Chinese screening dates. At the same time, co-productions are also regarded as domestic films

in the UK, meaning that they have access to UK film tax relief, as well as financial support from various film funds in the UK. Thus, the China–UK co-production treaty not only seeks to guarantee the flow of international capital but also supports films in exploiting tax credits, which, under the official treaty, renders China–UK co-production a form of “arranged marriage” from an economic perspective.

On the other hand, however, the China–UK Film Co-Production Agreement cannot resolve all challenges faced by potential China–UK co-production activity, and the treaty has clearly not been very effective in practice. Without support from the BFI, independent production companies in the UK are likely to face financial pressure at the provisional co-production stage as a result of the co-production treaty’s regulations. Michael Nakan, who has prepared several China–UK co-productions, explains that the greatest challenge has been securing co-production status based on the approval of both competent authorities. (Interviewed by the author, 2020). According to Nakan (2020), at the provisional approval stage, the BFI – as the UK executive body for granting approval – focuses on examining the production team, which requires an on-board producer and film crews. By contrast, China’s competent authority requires a fully developed script for provisional approval. Therefore, an independent production company is obliged to spend a large sum of money in the early stages of the process without any guarantee that the project will be granted provisional approval. In addition to the considerable advance expenses, the lengthy period of time required for authorities to offer approvals may also put an independent production company at financial risk.

In addition, political developments may have cut off the potential fruits of China–UK co-production. After the Hong Kong protests began in the summer of 2019, the UK trade body PACT cancelled all of its programmes with China for 2020, including the popular UK China Creative Exchange. Dawn McCarthy-Simpson commented that “Politics is really at the heart of whether we have a good trade in media with China or not.” (Ravindan, 2019).

There has also been a shift of emphasis in the Chinese production sector, and in the performance of Chinese films in the domestic market. Thus Chinese audiences shifted their support from Hollywood blockbusters to patriotic Chinese blockbusters, according to the *Financial Times* (2021): “in the first half of 2021, China’s box office reached roughly \$3.9bn, according to the tracking app Dengta, and although the highest-grossing films used to be Hollywood

blockbusters, domestic films have taken the crown for the past six years.” While the highly anticipated Marvel film: *Black Widow*, *Shang-Chi* and *the Legend of the Ten Rings* have not yet secured release dates in mainland China. On the other hand, *The Battle at Lake Changjin*, an epic war film about the Chinese army during the Korean War, achieved \$203.2m over China’s National Day weekend in China and grossed \$882m in total. (Box Office Mojo, 2021). Jiang Defu, Senior vice president of Bona Film Group, stressed that “Chinese filmmakers should work hard to please the domestic audience first.” (Zhang, 2020). According to Jiang (2020),

We are the second-biggest film market now. We should slow down and do your own things right. We can work with foreign companies, but we should make sure local audiences love your films first. We should make our foundation solid before we go out to the world.

Jiang’s statement indicated two factors, first, the leading Chinese studios intended to put more effort in producing Chinese blockbusters at the present stage, as these films appealed to the audiences’ spirit of patriotism and thus achieved great box offices. Second, Jiang seemed to suggest that international distribution of Chinese films is not necessarily prioritised, and China’s international co-production with foreign companies should aim for ‘true love’, rather than just the ‘arranged marriage’.

Indeed, the Chinese government’s latest guidance *China’s Film Development Plan during the 14th Five-year Plan Period* asserts that “by 2035, our aim is to produce more than 50 Domestic films every year that makes over 100 million yuan (estimated \$15 million) each.” (State Film Administration, 2021). The plan (2021) additionally stated that “Domestic films shall account for more than 55% of the annual box office, as by 2025, the total number of screens will exceed 100,000.” This is a long shot for the Chinese film industry; Hongbo Pang (2021) at *Jiemian News* commented that “if the annual box office share of imported films continues to fall below 30%, it will be very hard for domestic films to drive the entire film market forward.” Under such a policy, it is highly likely that fewer imported films will be exhibited in Chinese cinemas and that exhibitors will favour Hollywood blockbusters.

While the Chinese film industry has increasingly focused on the domestic market, however, the Hollywood also became less eager to please the Chinese market. The *Financial Times* (2021) commented,

Imported films accounted for 38 per cent of China's total box office in 2018, 36 per cent in 2019 and only 16 per cent in 2020, additionally hit by Covid-19, according to Maoyan Entertainment. Montgomery of Global Connects said China was definitely not crossed off the list, but might be shifting out of focus for Hollywood.

None of this is good news for UK film producers. In this context, the question inevitably arises as to whether China merited its position in Tier One of the BFI's strategic priorities and whether China–UK co-production has the potential to succeed under any circumstances. After China was prioritised as a Tier One territory for active engagement through the International Strategy in 2012, the honeymoon period between China and the UK lasted for only a few years. The co-production treaty was signed in 2014, and in 2016, the BFI announced a year of business, trade, creative and cultural collaborations between the UK and China. Amanda Nevill (2016b), the former BFI CEO, highlighted:

China is becoming one of the most important cultural and economic partners for film and is a key territory in the BFI's international strategy for film. With this celebratory year, the BFI puts words into action by presenting a programme packed with dynamic economic, creative and cultural partnerships to foster this hugely important territory and the largest and fastest growing film audience in the world.

However, new cooperation between the Chinese and UK governments or institutions with respect to film was scarce after 2019, due to the changes of political relations between two countries, as I discussed above, the 'Golden Era' between two countries ended around 2019. Meanwhile, China's shifted strategies towards international co-productions also reduced the collaborations between filmmakers in China and in the UK. The BFI has either shifted its focus from the Chinese market or has assumed a passive role in the collaboration. According to a member of staff at the BFI,¹ when the China–UK co-production treaty was signed, the BFI merely served as the body responsible for enabling qualifying co-productions to access national benefits. The interviewee also indicated that while the BFI has dispatched a UK film dele-

¹Interview with the author, Berlinale, 25 February 2020; the interviewee preferred to remain anonymous.

gation to Beijing every year with the aim of solidifying the UK's relationship with the Chinese film industry, the complexities of Chinese politics have rendered it close to impossible for independent filmmakers to co-produce with China.

Despite the relatively unproductive character of China–UK co-production to date, official co-production arrangements may nonetheless be the most feasible route by which British films can gain a market share in China. On the one hand, the new guidance makes it more difficult for British films to be imported to China as revenue-share or buy-out films; on the other hand, co-production may be increasingly valued by Chinese or British producers, as according to the co-production treaty, co-produced films should be treated as domestic films in China. Not only does this condition potentially help producers to obtain a further share in the Chinese market without being subject to the restrictions on imported films, but Chinese exhibitors may also welcome a certain degree of diversity as a means of attracting more audiences.

5.3.1 A case study of China-UK co-production: *The Foreigner*

A good case study for our purposes here is *The Foreigner*(2017), starring Jackie Chan and Pierce Brosnan, which is considered a UK, US, and Chinese co-production success, and also qualified as an official China-UK co-production under the China-UK Co-production treaty, meaning that “it would be treated as a local production and the foreign producers could enjoy a higher share of Chinese box office. It was eventually released during China’s National Days holidays when only local films or official co-productions can be released.” (Shackleton, 2018). Moreover, as a qualified official co-production, “40% of the Chinese box office flows back to the partners rather than the usual 25% because of the co-production status.” (Tartaglione, 2017). The film’s cumulative worldwide gross revenue was \$145,374,099, with China’s gross income estimated at \$76,730,590 and that of USA estimated at \$34,393,507, against a relatively modest production budget of \$35 million. (Box Office Mojo, 2017b). Therefore, *The Foreigner* enjoyed significant financial success. Furthermore, the film achieved similar online ratings both in China and in the West, with 7/10 on IMDb (IMDb, 2017) and 7/10 on Douban (Douban, 2017), suggesting that the film has successfully resonated across two different cultures.

The first factor contributing to the film’s success is its narrative. *The Foreigner* is an action thriller film based on Stephen Leather’s 1992 novel *The Chi-*

naman about a London-based Vietnamese restaurateur and skilled Vietnam War veteran who travels to Ireland to hunt down the people responsible for a bombing that killed his family. The film adapted the novel's plot to a more contemporary setting as it was produced in 2015. According to *Screendaily's* interview with the producer Wayne Marc Godfrey, the story came to Godfrey's mind when he established the London-based financing and production company in 2007, Godfrey had read *The Chinaman* during his childhood, and it seemed to be an ideal work to adapt for film. (Shackleton, 2018). Godfrey (2018) stated that "when I optioned the book, I wasn't thinking would it work in China, I was just driven by the story. In some respects, I'm lucky it took so long and the China market became so relevant and viable." In this sense, the co-production was initially a "true love" project and an example of epiphanic transnationalism.

A second factor contributing to the success of the film was the participation of international film stars, including Jackie Chan and Pierce Brosnan, who indubitably enhanced the film's success in multiple ways. As Godfrey recalled, the story attracted Chan's attention in 2014 and he agreed to star in the film "but on the condition that a more experienced director was brought in." (Shackleton, 2018). Furthermore, after changing the director, Chan became the major investor and brought in his own production company Sparkle Roll Media. Chan's investment elevated the film from a medium-budget transnational production to an international blockbuster. In addition, the film's release during China's National Day Holiday was hardly a coincidence. The National Day Holiday is a seven-day holiday that runs 1–7 October, and is known as Golden Week. It is a time during which Chinese people can enjoy some leisure time at home and abroad. It is widely known that imported films are not permitted to premiere during China's National Day Holiday. The exclusive exhibition of domestic films during the National Day Holiday is regarded as a patriotic move, as well as a measure aimed at protecting China's film industry. However, official co-productions are an exception to this rule because co-production treaties allow co-produced films to be treated as Chinese domestic films. While Tan (2017), the producer of the China unit and the CEO of Sparkle Roll Media, claimed, "China's opening date was according to the US's plan, our company hoped the film would be released in HongKong or Mainland China first... STX suggested Oct 13 to be the US's opening date, so China's premiere date is set at the National Day."

Jackie Chan's personal influence and his connection with Chinese government was clearly a crucial factor that contributed to the film's release during Golden Week. Indeed, the release date secured the film a significant advantage at the Chinese box office, with takings of \$22,008,192 ([Box Office Mojo, 2017b](#)) on the film's release – a quarter of its total gross in China.

The third factor contributing to the success of the film was that different marketing strategies were effectively applied in the UK and in China. It is interesting to note that the film's title – *The Foreigner* – was translated as “A Duel in the UK” in Chinese. In addition, the film's Chinese poster highlighted not only Chan's and Brosnan's faces, but also Big Ben. The American/British poster focused on the film's main character and genre, showing Chan standing alone on a bomb site. Over a number of years, Chan has successfully built his own brand in Hollywood, and the promotion of his character on the film's poster proved to be a successful strategy. Chan received the greatest credit from film critics: for instance, the critical consensus on Rotten Tomatoes reads “The film is pretty formulaic and Bond like, but it's fun to see Jackie Chan in action again. Can he do serious drama? That's affirmative.” ([Linda & Lerner, 2019](#)). Clearly, the strategy implemented to attract Chinese audiences was to promote the film's British elements, while the British audience preferred to see Chan as the action star. Tan also noted the cultural differences and the compatibility of a cross-cultural film, stating

We need to understand the cultural differences between our audiences and try to bring the two cultures together to tell an international story... Chan in the film shows his advantage of being a perfect combination of comedy and action, the film is actually two kinds of culture integration, at the same time it suits the taste of audience in different cultures. ([Bai, 2017](#))

As a US/UK/China co-production, *The Foreigner* was heavily formulaic, as is typical of Hollywood action thriller. While the film had been adapted from a British writer's novel and the project was initially funded by British producer Wayne Marc Godfrey, the film was directed by Martin Campbell, a New Zealand film and television director based in the UK, who had a long history of action-thriller credits, including two James Bond films, two Zorro films and one of the DC Comics superhero films. Meanwhile, the film was scripted by David Marconi, an American screenwriter. The involvement of US companies was also essential: STX Films, an American media company, was

the major production company, and STX Entertainment distributed the film both in America and worldwide. In this context, the crews that worked on the production were also largely British and American; with the exception of Jackie Chan as the lead character, Chinese filmmakers and crews had little input in the production. The film thus failed to truly reflect cultural exchange or diversity. Nonetheless, it attracted audiences on a global scale.

The Foreigner's box office success is clearly difficult to replicate, as a commercially successful cross-cultural co-production requires a suitable script that will satisfy the tastes of both Eastern and Western audiences, sufficient investment, international superstars, a global marketing strategy and policy support. All these conditions will rarely be met at the same time, and it is largely impossible for independent UK and Chinese filmmakers to realise such an achievement. The “arranged marriage” model between the Chinese and UK film industries is thus not sustainable, and the BFI also stopped prioritising China as a Tier One country in its international strategy. Nevertheless, the UK and China governments' incentives and support in establishing cross-border networks will be crucial in encouraging cross-cultural co-productions under the “true love” model in the future.

5.4 Australia-UK co-production

As distinct from China–UK co-production, collaboration between the UK and Australia seemed to be a more obvious move, and, as noted in chapter 3, has a long history. Co-production between the UK and Australia represents an affinitive transnationalism, as they share similar cultures and the same language. However, the similarities between these two countries places them in close competition for US inward investment. This section examines the collaboration between the UK and Australia in the contemporary period to further discuss the dilemmas that the UK faces with respect to its international strategy.

Australia has increasingly focused on international co-production over the past two decades, and the UK has been Australia's second most active coproduction partner, after Canada. Prior to analysing the endeavour and success of co-production between UK and Australia, it is necessary to look at Australia's intentions and policymaking in supporting co-production, and how this contributes to collaboration between the UK and Australia film industries.

By 2021, Australia had signed co-production treaties with 12 countries, according to Screen Australia (2021d),

199 official co-production titles with total budgets of \$2.0 billion have either been completed or have commenced production (as at 30 November 2020). France (34), the UK (51) and Canada (68) have had agreements with Australia for more than 20 years and represent the highest level of activity.

At the same time, Australia aims to engage with Asian countries, such as Singapore and China. As Screen Australia's report *Common Ground* (2013) pointed out,

Australia is in the process of discovering new ways to work with neighbouring countries across Asia. Our evolving economic and cultural engagement with the region has seen an expansion of opportunities for collaboration across different sectors, and the Australian screen production industry is already beginning to take advantage of this.

Australia's geographical advantages and unique landscape certainly have the potential to attract international film productions. While co-production offers an effective strategy by which Australian filmmakers can access more funding and to attract inward investment. Screen Australia (2012) recognised that "the most significant advantage of co-productions is the access to extra finance that the structure offers". The Australian government has also sought to promote the country as an ideal filming location, with *Foreign Policy White Paper* (2017) stating that "The Government will continue to partner with the private sector and state governments to ensure Australia is recognised as a world-class filming destination."

Furthermore, similar to the BFI's international strategy, the promotion of co-production is a government strategy aimed at increasing the representation of Australian culture on screen and boosting opportunities for Australian filmmakers. "For most of the twentieth century, Australian cinema was characterised by a pattern of modest but culturally significant levels of local production, accompanied by wide penetration by English and American products." (Burns & Eltham, 2010). The lack of investment in the film industry has also presented challenges. Over the past decade, private investment has typically amounted to less than 10% of the total finance of feature films.

In 2012/13, the number dropped as low as 1%, and in 2019/20, was still only 3% of the total finance. (Screen Australia, 2021c). Film co-production film is expected to compensate for this problem and to “provide a means to produce content of a quality and scale to compete in the international marketplace with US programming, particularly for those countries with small local production industries.” (Screen Australia, 2012).

Like most countries in the contemporary era, the Australian government has applied tax relief and provided public incentives to support the domestic film industry. However, government subsidies are clearly insufficient in light of increasing budgets. The Film Finance Corporation of Australia (FFC), a government screen agency, was established in 1988 and operated for 20 years. One the one hand, “the FFC believes that private sector investment is an important key for the long-term survival of the industry.” (FFC, 2003). On the other hand, they (2003) also noted that “film production budgets have risen steeply since the mid 1990s, while government funding has remained relatively static.” At the same time, the FFC (2003) recognised that “With its small population, and small revenue base, the Australian market cannot fully finance the more expensive program formats.”

In this context, the Australian government’s strategy shifted in the 2000s from subsidising film productions to attracting co-financiers from overseas. In 1995/96, government finance accounted for nearly 20% of total finance, but dropped to a mere 5% in 2019/20. (Screen Australia, 2021c). The declining proportion of governments subsidies has been compensated by increased foreign investment from around 2000, including Hollywood’s inward investment and investment from co-productions. As Hollywood production has continued to globalise, its runaway productions significantly changed Australia’s film landscape during the 1990s and 2000s; for example, *The Matrix* (1999) and the second film of in the *Star Wars* (2002) trilogy were shot at Australian studios. The relatively low labour cost and the cheap Australian dollar made the country Hollywood’s new favourite location. At the same time, Hollywood’s large-budget productions not only benefited Australian film crews, tourism and related industries but also led to a series of government policies that aimed to encourage foreign productions in Australia. A parliamentary report demonstrated in 2004,

A more recent measure is the 12.5 per cent refundable tax offset for film production in Australia, which commenced in September

2001. A film will automatically qualify if it spends more than \$50 million in Australia. If the spend is between \$15 million and \$50 million, then 70 per cent of the total production expenditure must be in Australia. ([The Parliament of the Commonwealth of Australia, 2004](#)).

Like the UK tax relief policy, the Australian tax relief also has great economic focus. Moreover, the requirement that a film receive Australian tax relief was not focused on showcasing Australian culture but rather the only criterion was the amount of investment. The scale of tax relief further increased in 2008, when Screen Australia became the main institution supporting the national film industry. Location and Post, Digital and Visual effects production (PDV) incentive schemes were also introduced in 2007 and revised in 2011. As a Department of Infrastructure, Transport, Regional Development and Communications report ([2019](#)) explains, the Location Offset scheme is “a 16.5 per cent rebate for the production of large-budget film and television projects shot in Australia.”

In addition, “in July 2020 the Australian Government added AU\$400 million to the Location Incentive grant which is available from 1st July 2019 to 30 June 2027...The Location Incentive grant is a merit-assessed grant where funding may be offered up to 13.5% of a project’s Qualifying Australian Production Expenditure. This grant complements and is additional to, the Government’s existing 16.5% Location Offset tax rebate.” ([Ausfilm, 2021](#)). The Australian government thus aims to attract large-budget productions to film in Australia by offering up to 30% tax relief.

The policy also encourages post production work in Australia, as the PDV Offset scheme provides “a 30 per cent rebate for work on post, digital and visual effects production (PDV) in Australia, regardless of where a project is shot... In 2010, the minimum qualifying expenditure threshold for eligibility was reduced from \$5 million to \$500,000,” ([Department of Infrastructure, Transport, Regional Development and Communications, 2019](#)). Location and PDV Offsets demonstrate the government’s ambition to attract inward investment and to compete with other countries such as the UK, which offer tax incentives for the same purposes.

In addition to offering impressive tax relief to investors, the Australian government offered an even greater incentive for co-productions. The Producer Offset for Australian productions and official co-productions, which has

been administered by Screen Australia since 2007, is another type of tax incentive for domestic film producers and co-production partners. As Screen Australia (2021b) states, “Official Co-productions with Australia may be able to utilise the Producer Offset, which is a 40% refundable tax offset on the Qualifying Australian Production Expenditure (QAPE) incurred making feature films.”

As the highest tax refund available for Australian producers, only domestic Australian films and official co-productions are qualified to receive the Producer Offset. For domestic Australian film producers to be eligible for the Producer Offset a project must have significant Australian content – that is, it must meet the Significant Australian Content (SAC) test, which equals to the UK’s Cultural Test, Screen Australia examines a film’s subject matter, the location where the film was made, the nationalities and places of residence of the persons who participated in making the film, and the details of the production expenditure incurred in respect of the film to determine whether the film contains enough Australian cultural elements to fulfil the SAC test. (Screen Australia, 2018). However, “projects identified as co-productions automatically qualify for the Offset without having to pass the Significant Australian Content (SAC) test”. (Screen Australia, 2012). This offer did not achieve the desired effect, however, as Screen Australia noted (2012) “The introduction of the Offset has had little or no impact on international co-production activity to date, perhaps due in part to the high Australian dollar.”

By introducing Australia’s policymaking in supporting its domestic film industry and comparing it to the UK’s contemporary economic film policy as discussed in the previous chapter, we can see that Australia shares a similar route to the UK in attracting inward investment. Furthermore, the Australian government offers higher tax incentives than the UK government, and in this sense the UK and Australia are rivals in competing for international resources, particularly in terms of US investment.

At the same time, the UK and Australia have maintained their relationship as essential film industry co-operators, and the number of official UK–Australia co-productions has remained generally stable year-on-year, since the official co-production treaty was formed in 1986, under a one-off Memorandum of Understanding ahead of the signing of the treaty in 1990. According to Screen Australia’s statistics, from 1986 to 2020, between one and three official co-productions were made each year. It is also interesting to note that during the

1980s and 1990s, the co-productions consisted largely of mini-series, documentaries and a few features; by contrast, during the 2000s, features predominated, while since 2009, a diverse range of co-productions have been made, including increasing numbers of documentaries, features and mini-series. ([Screen Australia, 2021d](#)).

Ironically, the pandemic increased the pace of co-production, and Screen Australia's Annual Report ([2021a](#)) noted that during 2020/21, "The BBC, Netflix, Channel Nine, Stan, SeaLight Pictures and Humble Bee Films produced the blue-chip natural history series *Life in Colour* with David Attenborough, an Official Australian/UK Co-production made with assistance from Screen Australia, Screen NSW and Screen Queensland." Meanwhile, Australia became one of the world's safest places to shoot during the pandemic. According to *Screendaily* ([2021](#)), "A\$1.9bn (\$1.36bn) was spent in Australia on local and international drama film and TV production for the 2020/21 financial year, nearly double the expenditure in the previous 12 months and 53% above the five-year average". In addition, Garry Maddox ([2021](#)) of the *The Sydney Morning Herald* reported that,

Three foreign movies boosted the total: Marvel's *Thor: Love and Thunder*, the Liam Neeson action thriller *Blacklight* and Ron Howard's Thai cave rescue drama *Thirteen Lives*. After production stalled during the first pandemic lockdown, spending on Australian films and so-called official co-productions with other countries more than doubled to \$500 million.

Despite the boost that Hollywood productions have enjoyed in Australia, neither the pandemic nor Australia's growing tax incentives appears to have slowed the pace of UK–Australia co-production. The reasons for this are clear: an analysis of Australian film policy reveals that the UK and Australia share various similarities. First, they both have small domestic film markets; second, they both have English as their first language and share a Western culture; and third, both of the above factors result in the demand for inward investment to cover the cost of production and international distribution to make possible profits. Thus, as we have seen, both the UK and Australia have developed tax relief policies as part of their international strategies aimed at attracting Hollywood blockbusters to film and engage in post-production development in the respective countries.

Therefore, from the perspective of developing international co-productions, the UK and Australia are rivals as well as collaborators. While they may compete for American resources, British and Australian producers have a shared culture and language, and cooperation helps them to access more funding opportunities and to reach wider audiences. A good example is the world-leading film and television production company See-Saw Films, which was co-founded in 2008 by British producer Iain Canning and Australian producer Emile Sherman. This UK–Australian company exemplifies successful collaboration, having produced the Oscar winner *The King’s Speech* (2010) and the six-time Academy Award nominated and two-time BAFTA winning *Lion* (2016). As *Screendaily* (2017) noted, “The company funds its development slate, usually with partners including BFI, BBC Films, Film4 and Screen Australia.” For example, *Mary Magdalene* (2018) was structured as an official UK-Italy-Australia co-production to qualify for tax relief, while the company pre-sold the film’s foreign distribution rights to Universal/Focus. (Mueller, 2017). Despite the film’s controversial reviews, it was released in 41 countries and territories with box office sales of over \$11 million worldwide..

5.4.1 A case study of Australia-UK co-production: *The Railway Man*

Alongside See-Saw Films’ projects, *The Railway Man* (2013) is a good example of an official Australia-UK co-production from the past decade. The film was internationally distributed and achieved worldwide box office takings of \$24,174,885 (Box Office Mojo, 2014). It also won the Australian Academy of Cinema and Television Arts (AACTA) Award for Best Adapted Screenplay (2015). I develop a case study of *The Railway Man* here as a case study to examine the essential elements for a commercially and artistically successful Australia-UK official film co-production.

I consider the co-production from several perspectives, including the script development, production and distribution. First, the film was adapted from Eric Lomax’s 1995 autobiography, which relates Lomax’s experiences as a prisoner of war during the Second World War and recounts how, many years later, he managed to return to Thailand to visit the locations of the prison camps and forgive his Japanese interrogator. The book incontrovertibly concerns transnational factors, as the story takes place in both the UK and the UK’s battleground in Asia during the war. The book *The Railway Man* was also

made into a BBC television drama *Prisoners in Time* (1995), which had made Eric Lomax a well-known character in advance of the film's production. These factors contributed to a successful film adaptation of Lomax's story.

The film's narrative did not differ significantly from either the book or the television drama. It begins in the 1980s, when Lomax (Colin Firth) has an encounter with Patti (Nicole Kidman) on a train. After Lomax and Patti's marriage, it emerges that Lomax has been seriously traumatised by the war. The film then moves to flashbacks to 1942, when the younger Lomax (Jeremy Irvine) was held captive by the Japanese and forced to work as a slave labourer on the "Death Railway" being constructed from Thailand to Burma. As the narrative moves between past and present, the scenes shift between the UK and Asian territories. In this situation, the story determined the variety of filming locations, indicating that the film had considerable potential to be a successful co-production.

A second factor in the film's success was that it was granted significant benefits as an official coproduction. To qualify as an official co-production, financial and creative contributions from both the UK and Australia were required to reach minimum proportions. The BFI has highlighted that tax relief will be granted only if co-productions "have a minimum UK core spend requirement of 10%, including those made under official co-production treaties" (BFI, 2022a), while "UK core expenditure for purposes of the tax relief is defined on that which is used or consumed on UK soil rather than by the nationality of the people, goods and services". (BFI, 2022a). To meet these requirements, according to *BBC News*, the film was first shot in Edinburgh and North Berwick before the crew then moved to Thailand and Queensland, Australia (Unknown, 2012b).

In addition, HMRC's Film Production Company Manual states that "where the FPC [Film Production Company] was involved in a co-production HMRC would expect the arrangements between the co-producers to be such that each co-producer bore the expenditure for which they were ultimately responsible, and that the accounts of the FPC's separate deemed trade reflected that same division of responsibility." (HMRC, 2016). *The Railway Man* was also qualified as an official co-production in this sense, as the Australian publication *If* (2012a) noted that "UK-based producer Andy Patterson wrote the script with Frank Cottrell Boyce and chose Queensland's Chris Brown as his Australian partner". Meanwhile, the film was "backed by Screen Australia in

association with Silver Reel, Screen Queensland, Creative Scotland and Lionsgate UK”, with the Australian publication *If* (2011) reporting that “Screen Australia has announced \$3 million worth of production investment across three feature films, including Jonathan Teplitzky’s *The Railway Man*.” The investment from Australian and British government backed funding and the tax relief for both British and Australian producers have significantly reduced the budget for the production.

In addition to the economic benefits that it conferred, the official co-production also constituted a socio-cultural contribution to both the UK and the Australian film industries, particularly the development of talents. The press highlighted a statement from Screen Australia chief executive, Ruth Harley, who remarked, “This is a wonderful opportunity for one of our country’s rising directors, Jonathan Teplitzky, to work with one of the world’s finest actors, Colin Firth.” (Unknown, 2011). Evidently, the co-produced film was highly regarded as an opportunity for British and Australian talents to cooperate outside Hollywood and across countries.

The international release of *The Railway Man* has also showcased the advantages of Australia-UK co-productions. According to *If* (2012a), “Transmission will distribute the film in Australia and New Zealand, while Lionsgate secured UK distribution rights. Lionsgate will also handle international sales.” Furthermore, *Deadline* (2013) further noted that “The Weinstein Company is acquiring U.S. distribution rights for around \$2 million to *The Railway Man*”, after the film had received “a prolonged standing ovation after its world premiere at the 2013 Toronto International Film Festival.” (Fleming, 2013). As a result, the film had a theatrical release in 32 countries and territories, while the estimated budget was \$18 million, the gross worldwide reached \$24,174,885. (IMDb, 2013). The highest grosses were seen in the UK (\$8,455,269) and Australia (\$6,272,879), the rest of the international gross contributed more than 40% of the total box office. (Box Office Mojo, 2014). Under these circumstance, *The Railway Man* became one of the top 20 UK qualifying films at the box-office released in the UK and Republic of Ireland in 2014. It should be noted that the top 20 films included only four UK independent films and four co-productions that were not backed by US companies. (BFI, 2015b).

While the film’s story and the cast were undeniably essential to *The Railway Man*’s commercial success, its qualification as an official co-production significantly promoted international distribution. This meant that the film

achieved the “global reach” that was an aim of the BFI’s International Strategy, and made a vital contribution to the health of UK film by “educating young audiences, [and] developing filmmaking talent, supporting local and international distribution”, another of the BFI’s aims. (BFI, 2012b). The success of this official co-production thus demonstrates that co-production may be an effective means of promoting international distribution.

In conclusion, Australia, belonging to the secondary tier of prioritised territories in the BFI’s international strategy in the 2010s, has maintained a steady pace in its cooperation with the UK in recent decades. Both Australia and the UK have increasingly valued the role that inward investment, particularly from the USA, plays in contributing to their respective domestic film industries and economies. In this respect, Australia and the UK have competed for international capital with attractive tax policies. Meanwhile, Australian and British film industries are ideal co-production partners, not only because of the opportunity for British producers and Australian producers to collaborate spontaneously by virtue of their shared language and similar cultural backgrounds, but also because co-production between the UK and Australia increases the film’s opportunities for a wider international release. Both the UK and Australia thus have access to excellent filming locations and talent, coupled with continuous support from the BFI and Screen Australia. Nonetheless, the success of a UK–Australia officially co-produced film will largely depend on the script and the talents available.

By introducing China and Australia as two distinctive types of co-production partner that have worked with the UK during the BFI era, it is possible to identify the essential components in a successful cross-cultural film co-production. It is also makes it possible to identify the different strategies that the BFI should adopt with respect to different priority territories. Evidently, a successful official co-production endeavour is typically encapsulated in a film that generates profits and critical acclaim around the world; meanwhile, a sustainable partnership between the partner countries is also crucial for UK–international co-productions.

5.5 From Creative Europe to the Global Screen Fund

While international co-production represents one of the BFI’s key strategies for increasing global distribution and expanding soft power, the launch of the

Global Screen Fund (GSF) in 2010 represented a new approach in a new phase of the BFI's international strategy.

The GSF is funded by the Department for Digital, Culture, Media and Sport (DCMS) and administered by the BFI. According to the BFI, the GSF is driving a new international promotional campaign and “unveiling a new brand strategy, the major campaign will showcase independent UK screen content through multi-territory promotion of talent, content and companies.” (BFI, 2021c). Stephen Kelliher, Managing Director of Bankside Films, also noted:

The UK Global Screen Fund is a dynamic and essential initiative which recognises the importance of support for the British screen sector and for British films internationally... This award is invaluable in enabling us to amplify the impact of British film in international markets using new and innovative strategies with the objective of growing audiences for British film worldwide which, in turn, positively impacts the sustained growth of companies within the sector. (UK Government, 2021c).

The name “Global Screen Fund” clearly reveals the UK government's determination, as it stands in line with the government's promotion of a “Global Britain” following Brexit. It thus shares the government's commitment to “delivering on our international ambition”. (Foreign, Commonwealth and Development Office, 2019). As discussed, the BFI's international strategy moved to a third stage under the premise of Brexit, and the UK's withdrawal from the EU-funded Creative Europe scheme. The questions of whether GSF represents an effective replacement for Creative Europe as far as the UK film industry is concerned and whether the GSF fund promotes the UK film industry with innovative approaches will be addressed in this section.

First, it is necessary to clarify what Creative Europe is and how has it helped the UK film industry. The scheme was first established in 2014, and over 7 years, the fund has provided €1.46 billion (£1.27 billion) in investment for the creative industries of its members (European Commission, 2021). In particular, Creative Europe MEDIA is an important strand that focuses on “increasing cooperation at EU level, through support to co-productions, structured networks and partnerships” (European Commission, 2022). According to *Screendaily* (2020a), “The programme awarded €89.5m (\$101.4m) to 376 UK-based outfits and helped distribute 190 UK films in other European countries from 2014-2018”. However, the BFI also noted a decline in investment

from the EU, claiming,

The European Union (EU) provided investment of £5.4 million for UK film activity, of which £4.4 million came from Creative Europe's MEDIA sub-programme in 2017 and £1 million was via the structural funds in 2017/18. Investment from these funds, which include the European Regional Development Fund and European Social Fund, increased compared with 2016/17 (£0.5 million) but was substantially down from £7.6 million in 2015/16. This reflects a general decline in investment from EU structural funds across the UK's screen sectors. (BFI, 2019d)

In addition, "Omission from the Brexit policy paper confirmed what many in the industry feared and UK companies will no longer benefit from Creative Europe." (Rosser, 2020a). Consequently, the UK's participation in Creative Europe ceased at the end of 2020.

The withdrawal from Creative Europe resulted in various challenges to the UK film industry, of which the lack of funding and the damage sustained to partnerships with European countries have been the greatest concerns. Fiona Hyslop (2020), Scotland's Culture Secretary criticised the withdrawal as follows: "There was no need to take the programme off the table, as it is entirely possible to participate as a non-EU state...The UK Government is erecting barriers to continued cultural exchange and sending the message that it is closing itself off to our nearest neighbours." *Screendaily* (2020a) also commented that "potential MEDIA support can mean the difference between films securing international partners or not". Creative Europe's value to the UK was also far more than just grant funding, since it helped the films to reach their audiences at home and internationally, and it has been crucial in promoting a diverse film culture in UK cinemas. By leaving the European network, Philip Knatchbull (2021a), the CEO of Curzon "warned that UK cinemas may be less incentivised to screen films that aren't British or American."

An alternative to the Creative Europe was clearly expected, as Neil Peplow highlighted, "We completely recognise the urgency from industry to get a strategy in place to facilitate the UK's international growth and reach." (2020a). In light of this, the GSF appears to be an eligible alternative. The DCMS proposed the £7 million fund to support British films internationally in November 2020 and it went live as a one-year pilot in April 2021. The fund was intended to "support independent film and screen content made in every corner

of the UK to export to markets around the world” (UK Government, 2021c). The government (2021c) additionally highlighted that “The UK Global Screen Fund will support independent companies across the UK, ensuring a UK-wide benefit and addressing geographic imbalance within the industry.” In this respect, the GSF aimed to support local businesses in taking advantage of international opportunities. The move also reveals the government’s determination to underscore its nations and regions policy, as discussed in Chapter 1.

Will GSF become as effective as the government has proposed? Similar to Creative Europe MEDIA, the GSF allocates funding to three strands, including International Distribution, International Business Development and International Co-production. However, Denitsa Yordanova, the head of the GSF, dismissed the idea that the GSF is essentially a substitute for Creative Europe, noting as follows:

I don’t necessarily see it as a replacement [of Creative Europe], I think there is a recognition from the UK government there is a need for public support for the increase of collaboration, and properly they need to redefine the relationship with the European Union following the Brexit, and the UK is still very much a European country, there is shared trade, mindset and history with Europe as a continent. In terms of the comparability of the Creative Europe scheme, the scheme is much larger...I am happy the GSF is trying to cover from the distribution to production and to business growth, but there is a lot of things we can’t cover from the small fund, this is not comparable in size and ambition. So in my opinion, the GSF is not a replacement of the Creative Europe, but the design is influenced. (Interviewed by the author, 2022a).

As Yordanova noted, the GSF does not have as broad a reach as Creative Europe. However, the GSF international co-production fund, as one of the GSF’s three strands, offers greater support to independent filmmakers. For instance, filmmakers could apply to the MEDIA production fund for a maximum of €50,000 for a single fiction project with a budget of over €1.5 million, and meanwhile a slate could be granted for €70,000 to 200,000. (Creative Europe, 2016). By contrast, eligible companies can apply for funding of up to £300,000 in the international co-production sector. Meanwhile, films must qualify as a ‘minority’ feature film co-production (i.e. a co-productions where the contribution of at least one of the other co-producing partners is greater than

the overall contribution of the UK producer), which television co-productions (whether ‘minority’ or ‘majority’ in nature) are limited to be the animation and documentary genres only. (Global Screen Fund, 2022b). To this extent, the GSF’s goal is to provide full support to independent filmmakers who may have limited resources but considerable potential.

The award-winning animation series *The Coop Troop* offers a working example, even though it is not a film project. It received £225,000 as the fund’s prize winner in the pilot year. (Global Screen Fund, 2022a). The animation is a UK, France and China unofficial co-production that was co-created by Colin Williams of Sixteen South and the children’s author and illustrator Alex T. Smith and co-produced by Sixteen South Originals and Mikros Animation IP. (Sixteen South, 2022). The series, produced in France and Northern Ireland, is set to debut on France Télévisions and the Chinese platform Tencent Video in 2023.

Yordanova (2022a) commented, “it is a very interesting co-production, the audiences are ready, distribution partner attached... early involvement of a big partner in China is a good sign in terms of potential audience reach.” Although Tencent had no involvement in the production, it is an important partner. The co-production is thus guaranteed distribution in France and China and can aim for global distribution. As this example demonstrates, the GSF international co-production fund can offer sufficient financial support and provide production companies with greater flexibility to co-produce with various countries.

Meanwhile, the GSF International Business Development scheme has been an innovative strand which is intended to “support UK screen content businesses across film, TV, animation and interactive narrative video games to enhance their international activities” (Global Screen Fund, 2022b). The fund is open to UK companies engaging in creative industries, and the GSF will not only offer non-repayable funding of between £50,000 and £200,000 in total over the three-year period but will also play the role of a mentor, assisting companies in developing a strong presence in the international marketplace. According to Peplow,

If we start from the producers, and their need is to develop a business and to become more international, their need is to develop an IP, a new script and a new project, which [can] then be potentially developed to a production or a game, to reach its audiences

or customers. We decided to have a business development fund, because we didn't want to only invest in the development of an IP, because we think if you hold the content, there are a couple of strategies that you can reach international audiences, which will benefit from an investment to a business plan, then we should open up to discussions around that...Thus, we came up with the idea to invest in business plans, a new approach to earn international income. ([Interviewed by the author, 2022c](#)).

Clearly, independent film producers acquire more than just funding. In this case, by examining the companies' business strategies, the GSF provides financial support to UK screen content businesses and helps those companies forge new international business partnerships. In the pilot year, 30 companies in the UK were awarded support from the GSF, with the three companies receiving the greatest amount of funding being: the Cantilever Group Limited, SFB Games Limited and Synchronicity Films Limited were the three companies that received the greatest amount of funding. ([Global Screen Fund, 2022a](#)). Clearly, the focus of the Business Development Fund is not to help producers develop content; rather, it is aimed at supporting well-developed British films or TV productions in their bids to achieve global recognition. For instance, Synchronicity Films, a BAFTA award-winning production company based in Glasgow, has produced five feature films and one BBC TV series since 2010. In this context, Synchronicity Films was in need of GSF's financial and network support to develop quality UK projects aimed at the global marketplace. Consequently, the company was awarded £115,000 by virtue of its credibility and potential.

The GSF International Distribution Fund is also relevant here. To a certain extent, it shares the goal of Creative Europe MEDIA's distribution fund, namely aiming to support distributors and sales agents in promoting films abroad. Creative Europe MEDIA undeniably contributed significantly to independent UK distributors and sales companies, who received considerable support from Creative Europe over the years, which helped them to distribute UK films within European countries. According to a Creative Europe UK Desk report in 2018 ([2018](#)), "The MEDIA sub-programme commits nearly 40% of its annual budget to helping European films travel across borders. In 2018 these grants allowed UK distributors and sales agents to release 27 non-national European films in the UK, and supported the releases of 63 UK

films in other European countries.” In addition, the fund also the fund also helped UK films to secure international distribution. In 2019, “The MEDIA sub-programme backed the distribution of many UK films in Europe with Ken Loach’s *Sorry We’ve Missed You* receiving nearly €1 million for its distribution in 22 countries.” (Creative Europe UK Desk, 2020). This contributed significantly to its worldwide box-office income of \$8,943,790 worldwide. (Box Office Mojo, 2019c). The MEDIA distribution fund was thus clearly essential to the film’s profitability.

By contrast, the GSF was unable to provide sufficient funding to as many distributors and sales companies as the MEDIA scheme had been able to. According to *Screendaily* (2022a), “In its pilot year, the international distribution strand has now made 34 awards totalling £1.04m...the biggest grant of £60,000 is Daniel Kokotajlo’s supernatural horror *Starve Acre*”. Although it is still too early to determine the effects of the distribution, the funded films to some extent reflect the strategy of the GSF to some extent. For instance, Jessica Swale’s *Summerland*, which had been released in seven countries during the pandemic in 2020, subsequently received support from the fund. “Sales agent Embankment Films received the grant of £15,155, which will help secure the theatrical release of the film in one specific territory, which has not yet been revealed.” (Rosser, 2022a). As a low-budget film with a production budget of £850,000, *Summerland* showed considerable potential and had been profitable prior to receiving the fund. The boost offered by the new distribution fund thus may have helped the film to reach more audiences and possibly accumulate more revenue.

While it was a small investment by the GSF and incomparable to Creative Europe MEDIA’s investment to the international distribution of Ken Loach’s film, this example demonstrates that the GSF evaluates projects assiduously and that it is risk-averse; that is, the fund is intended to enhance the international influence of films that have inherent potential with limited budget. On the other hand, the limited scope of the GSF means that UK films have less access to cinemas outside the UK. This is worrying, given the previous success of the MEDIA scheme. According to the British Council (2018), “distributors and sales agents outside of the UK have spent 19% of the grants awarded to their sector on acquiring and releasing UK films in their territories. The revenue generated by these films is just under €400 million.”

What the International Distribution Fund does not cover is the promotion

of international films in the UK, which contrasts with Creative Europe, which supported the distribution of European films in the UK. For instance, “Modern Films received €103,000 (\$120,000) for its release of Alice Rohrwacher’s *Happy As Lazzaro* in 2018 while Curzon and Mubi shared €368,900 (\$430,000) between them to release eight European films in the UK in 2018.” (Macnab, 2021a). Knatchbull (2021a) claimed that “there is now no formal incentive to show non-national European films in cinemas. Curzon is committed to showing a broad range of films from Europe and across the world, but obviously there is a concern that we will see a flattening of choice on a national scale.” Thus, not only do UK films have less access to cinemas outside the UK, but European films have become more difficult to exhibit in British cinemas.

In the near future, distributors and sales agents may find that their struggle to promote UK independent films in Europe intensifies, even with the support of the GSF. As I noted previously, the EU proposed to cut the amount of British TV and film shown post-Brexit, as “The UK is Europe’s biggest producer of film and TV programming, buoyed up by £1.4bn from the sale of international rights, [while] its dominance has been described as a threat to Europe’s “cultural diversity” in an internal EU document seen by the Guardian.” (Boffey, 2021). At the same time, the BFI stressed that British films and TV productions are still qualified as European works and that is illegal to eliminate British works. “Works originating from the UK are still European works for the quotas set out in the European Union Audiovisual Media Services Directive (AVMSD)...It includes a 30% minimum quota for European works on VoD services. This Directive was transposed into UK law and entered into force in the UK on 1 November 2020.” (BFI, 2022j). The high tension between the EU and UK urges the BFI to mend the EU-UK relationship in addition to developing new territories for the UK distribution, As such, further investment in international sales, marketing and promotion is required.

To conclude, the launch of the UK GSF was the UK government’s initial gesture of support for UK independent film and TV following the withdrawal from Creative Europe, and the BFI was centrally involved in the fund. The results of the pilot year were approved by the government, on 1st February 2022, when “the Culture Secretary, Nadine Dorries, announced that £21 million would go into a three-year UK Global Screen Fund to promote UK films internationally.” (PACT, 2022). Examination of the three strands of the GSF reveals the practical and strategic efforts devoted to supporting the UK in-

dependent film industry. The business development fund and co-production fund have effectively been designed to support producers on a case-by-case basis and to establish a sustainable network. However, compared with Creative Europe MEDIA, the GSF's smaller scale will inevitably affect its reach with respect to audiences and its international influence.

In particular, the lack of investment in the distribution sector may directly reduce the export of independent films, thereby resulting in less revenue for independent films and a diminished international impact for UK film culture. It may also harm the BFI's goal of achieving greater cultural diversity within the UK film market. Thus there are both economic and socio-cultural implications. The obvious quick fix is to increase funding; however, the desired long-term effects, which require the establishment of international networks between sales agents and promotional activities at film festivals, are not imminent.

5.6 Conclusion

It has been a decade since the BFI published *The Wide Angle: The BFI's International Strategy*. Despite the geopolitical changes and the global economic downturn in the interim, the UK film industry remains a global business.

The BFI noted that "film represent a growing part of the UK's economy, as well as a powerful cultural tool" (BFI, 2012b). To maintain a strong global position, the BFI has constructed a strategy that aims to guide the industry to support UK films with international appeals. However, the BFI had little funding to boost film production and exports, which were regarded as that two pillars of the UK film economy. Without the underlying conditions required for growth, the BFI's international strategy could offer little practical help. Up to 2020, aside from US inward investment, which contributed nearly 70% of the UK production volume per year, Creative Europe was an essential source of financial support for UK independent filmmakers with respect to international co-production and international distribution, along with the BFI's lottery funding and export fund.

The UK's withdrawal from Creative Europe following Brexit constituted a turning point for the BFI's international strategy and led to the establishment of the GSF. The new fund did not alter the BFI's international goals, but it did give the BFI the power to design and manage the fund. In this respect, the

BFI has had the opportunity to learn from the Creative Europe construct and improve the fund's design, making it more applicable to the UK situation. Consequently, the GSF exhibits greater practicality not only in subsidising projects but also in supporting them and enhancing their likelihood of success.

In particular, the international co-production strategy has shifted significantly: the BFI has stopped promoting official co-production treaties and instead intends to form treaties only if tax incentives are needed and will benefit the film producers from the UK and the partner country. The change represents a more pragmatic attitude in the changing face of globalisation today, as filmmakers are encouraged to discover cross-cultural partnerships and co-produce a film borne from "true love", rather than "arranged marriage".

Lessons shall also be learned from China-UK co-productions and Australia-UK co-productions. In the case of China-UK co-productions, the 'arranged marriage' was not fruitful partly due to the political changes and China's and the UK's different approaches to soft power, these elements inevitably became obstacles for filmmakers to collaborate. China's film censorship system and the lack of funding for the development of co-production scripts also led to the filmmakers' reluctance to co-produce. The 'arranged marriage' thus is not a sustainable co-production mode. By contrast, the UK and Australia have a long history of shared culture and languages, they are partners in co-productions and rivals in attracting the US's inward investment. The co-production between the UK and Australia has strong economic purposes and shows the characteristics of 'marriage of convenience', as their co-productions films aim to improve the international distribution and increase the global box office. As such, a successful co-production film depends on the story and talents to a great extent.

While the effect of the BFI's new strategy on co-production may not be fully visible for some time, new challenges loom on the horizon for the BFI and its international strategy. Brexit inevitably damaged the relationship between the UK and the EU film industries, and the export of UK content to the EU may also be affected. Things are likely to be particularly difficult for some independent filmmakers, considering that export income accounts for two-thirds of total revenues on average and that the EU has historically been the largest importer of UK films. In this context, it is a matter of some urgency that the BFI produce a strategic international plan for the post-pandemic and post-Brexit era. Any such plan should aim to re-establish

a cooperative relationship with European countries, including resolving the issues of crews working in the UK, supporting the distribution of European films in UK cinemas for a diverse film culture and ensuring that UK content is counted as European work to facilitate its distribution in the EU. In this sense, the economic goal of international strategy is to promote the UK as an international hub for creative industries and to increase the international distribution of UK films; the socio-cultural purpose is to increase UK films' international influence and promote a diverse film culture for UK audiences. While it may be a tall order, the BFI's responsibility is to reduce any obstacles that impede this goal and to map a clear path for potential international partners.

Chapter 6

The impact of the COVID-19 pandemic on the UK screen industry and screen policy

As this chapter was being drafted in 2022, the COVID-19 pandemic was still far from over. The first known case was identified in Wuhan, China, in December 2019. The disease quickly spread worldwide, resulting in a pandemic that significantly impacted every aspect of UK society, including the film industry. As noted in the report, *BFI: Next Up, Funding Strategy Consultation* (2022), “this is considered a vital moment for a sector facing significant changes, opportunities and challenges – which affects the overall mindset of stakeholders.” This phrase precisely describes the UK screen industry through the pandemic.

To date, there is not very much academic research focused on its impact on the screen industry, with the exceptions including Jon Swords’s (2020) written evidence submitted to the UK Parliament regarding its impact on DCMS sectors in 2020, and Doris Eikhof’s (2020) discussion of the impact of COVID-19 on inclusion and diversity. In this chapter, I remedy that gap in academic research and look at the impact of the COVID-19 pandemic on the UK screen industry and the government’s policy response, by tracking the key policy interventions applied to the production, distribution and exhibition sectors from March 2020 to March 2022. I note the challenges faced by the nation and the industry and examine the effectiveness of the BFI, and the government’s measures. I shall focus on two aspects of policymaking. First,

how effective was the existing policy in helping the film industry weather the COVID-19 crisis? Second, what new policies were developed specific to the COVID-19 era, and how effective were they? I also examine contemporary materials, including press articles, BFI reports, and interviews, to identify the lessons that can be learned from policymaking during the pandemic.

Before we get into the discussion, I shall first explain the term ‘screen industry’ and ‘screen policy’ that are used in this chapter, and by the BFI. The transition of the BFI’s focus from film industry to screen industry started a few years ago, with film, high-end TV (HETV), animation, video games and children’s TV all being defined as screen sectors, as they have benefited from the extended tax relief policy that I discussed in Chapter 4. The term ‘screen policy’ was thus adopted as it benefited various sectors in the screen business. In other words, the term ‘film policy’ was no longer sufficient to define the policy that applied to different sectors in the creative industry. The BFI also set up a Screen Sector Task Force to support the film, TV and video game sectors during the pandemic.

In this respect, the screen industry is part of the creative industries and belongs to the DCMS sectors; however, the BFI distinguished the screen industry from the broader concept of the creative industries as the different screen sectors are all eligible for the BFI’s lottery funding or tax incentives. This reflects the fact that the film industry is no longer the only focus of the BFI, with high-end TV now sharing the same the significance as film, and video games being increasingly taken on board. The BFI is thus now the lead agency of not only the film industry, but also these other screen sectors. Despite acknowledging this, I shall still give most of my attention to the film industry, as it is the focus of the thesis.

It is worth underlining the fact that the BFI and government policy had already established a national support system for the screen industry, before the outbreak of COVID-19. As discussed in previous chapters, the prioritised economic policy was the tax relief policy, while support for skills, training, and diversity and inclusion were the BFI’s major socio-cultural focuses before the pandemic. However, the outbreak of COVID19 inevitably disrupted the industrial model, meaning further interventions from the government and the BFI appeared to be necessary. These supportive measures, including the

furlough scheme, will be discussed later in this chapter.

6.1 A timeline of the UK government and the BFI's COVID measures and screen policies

First, I shall review the timeline of the government's COVID measures developed by the BFI's Task Force and the government. Faced with the global outbreak of COVID-19 at the beginning of 2020, the Prime Minister announced the first lockdown, ordering people to 'stay at home', on March 23, 2020. On March 26, lockdown measures legally came into force. As a result, "for 2020, the UK cultural economy's turnover is estimated to be 30% lower than in 2019. Large shares of cultural economy activity, and with it the demand for cultural labour, broke away within days." (Eikhof, 2020). The lockdown measures also inevitably affected the film industry, as not only were the cinemas closed, but also, the production companies also had to stop all the work. Jon Swords (2020) notes,

Many production companies have highlighted how work was lost almost overnight, with commissioners pulling projects completely or informing companies to pause activity until further notice. Some companies are losing hundreds of thousands of pounds of future work.

Under these circumstances, various business support measures were quickly made available to film companies. For instance, a New COVID-19 Film and TV Emergency Relief Fund was set up on March 25, 2020. The BFI and The Film and TV Charity have partnered to create the new fund, which, as a BFI statement noted, had been devastated by the pandemic. (BFI, 2020d). Meanwhile, the government had developed a furlough scheme that was paying 80% of the wages of employed people who were no longer able to work, with a monthly limit of £2,500 from March 2020. On April 3 2020, the UK government first published its *Financial support for businesses during coronavirus*, offering targeted support to small businesses, including cinemas. (2020c). The BFI also set out its support for those sections of the UK industry impacted by the COVID-19 crisis on April 9, with Ben Robert, the new Chief Executive of the BFI, announcing that the BFI had repurposed over £4.6m in National Lottery funding was repurposed to target specific areas of the sector, including exhibitors, freelancers and producers. (BFI, 2020b).

The first national lockdown lasted for 6 weeks, until a conditional plan for lifting the lockdown was announced on May 10, suggesting that people who could not work from home should return to the workplace but avoid public transport. In this context, the Film and TV industry sought to establish some safety measures that complied with the Government advice on COVID-19. These guidelines were drawn up by the British Film Commission alongside the British Film Institute. The guidance for *The Working Safely During COVID-19 in Film and High-End TV Drama Production* guidance was developed to help protect crew and cast from COVID-19 related risks appeared by the end of May. (Ritman & Szalai, 2020). The British Film Commission (British Film Commission, 2020) commented that “the support from the UK Government for this industry-led Guidance signals confidence in the UK screen sector to safely restart production and help support UK economic recovery.”

As the first lockdown was lifted, that the government also announced that “cinemas in England can reopen from 4 July, the government has confirmed - although many will not be ready to do so by that date.” (Youngs, 2020). In addition, a new temporary reduced rate of VAT of 5% was announced on 8 July 2020 for admission to certain attractions, including cinemas. (UK Government, 2020d). Although *Tenet* performed reasonably successfully at the UK box office for eight weeks, many films were postponed, including the James Bond film *No Time to Die*, which had originally been due to hit screens in April 2020 (it did not in the end reach cinemas until October 2021). In terms of productions, the UK Government “announced on 28 July a new UK-wide £500 million Film and TV Production Restart Scheme to help domestic film and TV productions which are struggling to get insurance for COVID-19-related costs.” (UK Government, 2020b).

However, the pandemic death rate started to rise again and the ‘rule of six’ was announced on September 14, 2020, indicating that indoor and outdoor social gatherings above six were banned in England. The rule was clearly once again devastating for film production and exhibition. Furthermore, the second national lockdown came into force in England on November 4.

While the second lockdown ended after four weeks, and England returned to a stricter three-tier system of restrictions on December 2, the indoor mixing during Christmas unfortunately resulted in the increase of COVID cases. On January 6 2021, England entered a third national lockdown. By this point, *No Time to Die* had been delayed for a third time, and film venues were

therefore at a great risk of folding, with the BBC (2021a) reporting that “leading film-makers including Danny Boyle and Sir Steve McQueen wrote to the UK Government, calling for financial support for cinema chains because UK cinema stands on the edge of an abyss”.

In February of 2021, the Prime Minister published a road-map for lifting the lockdown: Step 1 began on March 8, as schools in England reopened for primary and secondary school students and recreation in an outdoor public spaces was allowed between two people.

Step 2, starting from April 12, allowed the non-essential retail, hairdressers, and public buildings (e.g. libraries and museums) to reopen, as well as outdoor venues, including pubs and restaurants, zoos and theme parks. At the same time, film and TV production started to move into a pandemic recovery mode, with Tim Dams (2020b) from *Screendaily* noting that “some 41 high-end TV productions began principal photography in the first quarter of 2021, with a total UK spend of \$1.1bn (£778m). This is almost three times the spend for the same period last year — and the highest first-quarter production spend on record by a considerable margin.”

Step 3 allowed the reopening of indoor venues, including restaurants, pubs and cinemas from May 17. Step 4 removed most legal limits on social contact from July 19, According to *The Guardian* (2021b) in August, “Tim Richards, the chief executive of Vue, the UK’s third biggest chain, says last weekend proved to be its best since February 2020 thanks to a slate of new films being given a theatrical release rather than just on streaming services.” Hollywood blockbusters, such as *Dune*, *Eternal*, and *Shang-chi*, have attracted audiences back to cinemas. *No Time to Die* was also released globally in October 2021. The BFI (2021a) proclaimed that “640 film and TV productions [had been] enabled in the past 12 months by the Film and TV Production Restart Scheme.” Due to the success of the Film and TV Production Restart Scheme, on 5 October 2021, the DCMS announced a six-month extension to the scheme, with applications open until 30 April 2022 and providing cover for productions up to 30 June 2022. (BFI, 2021e).

The government did not force another lockdown, despite the fast spread of the Omicron Variant in December 2021, and on February 21, 2022, Boris Johnson, the Prime Minister, moved to lift all COVID restrictions in England and set out the “Living with COVID” plan. From March 21, businesses, places of worship and service providers no longer to follow government guidance on

measures to avoid COVID ([Unknown, 2022](#)).

As a consequence of the pandemic, the UK film industry had experienced turbulence from March 2020 to the present (March 2022). During this time, the Government response to the pandemic and BFI's COVID measures had significant impacts on the industry. In this respect, film policymaking has never been so critical to the survival of the film industry. The subsequent sections will thus analyse the challenges of different sectors in the film industry during the pandemic and examine the effects of the policy response.

6.2 The challenges for the screen industry during the pandemic

As the timeline indicates, the COVID-19 had a great impacted on UK society from the beginning of 2020 to the end of 2021, and there might be long lasting effects. The screen industry also faced unprecedented challenges along with the outbreak of COVID-19 and the BFI ([2020h](#)) noted during the first nation lockdown,

There have been two fundamental changes to the sector introduced by the government from which the immediate negative impact of COVID-19 stems, the ban on mass gatherings and eventual closure of cinema and the halt in physical production for TV and film. Combined, this has severe implications for the entire screen value chain – from immediate impact on workforce and cash flow to longer term impact on film financing, the content pipeline, TV schedules and cinema occupancy levels.

This section therefore examines the huge challenges faced by the screen production sector, distribution and exhibition sector during the pandemic and in the recent post-pandemic era, I also look at the COVID's impacts on the audience's viewing experience and film crews' working experience.

6.2.1 Challenges for the production sector

Looking back to the pre-pandemic age, the UK film market was booming before the outbreak of the COVID-19 pandemic. The BFI's statistics ([2020e](#)) showed that “in 2019, the spend on feature film and high-end television (HETV) production in the UK reached a record high of £3.62 billion. This combined

total is 16% higher than in 2018 and 63% higher than in 2014, the first full calendar year following the introduction of the tax relief for UK qualifying HETV production.” These impressive figures demonstrate the strong growth of the screen industry right before the COVID-19 pandemic.

Despite the prosperity, the UK film and TV production sector underwent great economic and socio-cultural challenges at the beginning of the national lockdown. As *Screendaily* (2021) highlighted in 2021,

The UK film, TV, radio and photography industries have lost an estimated £2.6bn in GVA (gross value added) during the COVID-19 pandemic, according to a report by the Creative UK Group...Film, TV, radio and photography are also estimated to have lost 5% of jobs – 12,800 – during the pandemic.”

The press also noted that “ScreenSkills showed that 16% of workers have left the screen industries entirely since the pandemic began.” (Dalton, 2021).

The first national lockdown shut down the production as film crews were unable to get together, and in this respect, it resulted in significant economic loss as the production were paused and skilled workers found it difficult to generate income. Richard Knight (2022e), the career support manager of Screen Yorkshire, recalled that “the start of 2020 was very busy, we got a lot of TV dramas and features films based in Yorkshire, and a lot of people plan[ing] to film in summer. When COVID hit, everything stopped.” Knight also recalled how Screen Yorkshire initially supported the film crews at the first place, “we came up with monthly online, on Zoom crews’ forum, where they could get together and talk about what was happening.” (Interviewed by the author, 2022e).

The production sector started to recover, following the COVID protocol guidance in June 2020. However, the production companies still faced several challenges at this stage. First, there was a problem with the production insurance. As Knight (2022e) explained, “all the productions were covered by the insurance company, but if some crews got COVID and the production had to stop for two weeks, the company did not agree to insure that because the chances were too high.” Therefore, a few production companies restarted without cover against potential COVID disruption, when the first national lockdown had been lifted.

Second, many projects were delayed due to COVID outbreak on set, including the inward investment films and high-end TV productions. The Hollywood

Reporter (2021) noted that,

Shooting on the second season of Netflix' hit period drama *Bridgerton* halted for a second time recently following a positive COVID-19 test and has reportedly paused indefinitely while the streamer and producer, Shondaland, create a timetable for return.

In this case, as *Bridgerton* was filmed across town in Greenwich, a neighbourhood in southeast London, the pause of the production disrupted the Netflix's schedule and led to impacts beyond the UK screen industry.

Third, the disruption to the supply chain of props during the pandemic and the difficulties with film locations were also great challenges for production managers. For instance, *Screendaily* reported,

In the words of one producer, UK crews are flexible and dextrous and the biggest challenges this time around can be the small things. Props for example: fresh flowers are hard to come by when all the florists are closed. And enforced last-minute location changes: a homeowner might be happy to still let in a crew but their neighbours decidedly less keen.

In addition, Shoebox Films' London-based Paul Webster, the producer of *Spencer*, told *Screendaily*,

All the curtains are coming from Italy and the people producing them in Italy have a minimal workforce operating," he says. "All our costumes are being made in the UK and all the fittings have taken place in the UK so now we just have the shipping challenge. But we can ship by air flight and that's what we'll do." (Tutt, 2021).

Knight also noted that some film scenes had to find bigger locations or film outdoors instead of indoors due to the social distancing rules. Furthermore, if a scene required two actors to stand close to each other, actors had to be filmed in front of green screens separately and then be put in the same picture in post production. (Interviewed by the author, 2022e). These unexpected difficulties during production may not have ultimately affected the quality of film, however, it inevitably increased the budget of productions.

Therefore, the greatest challenges for production companies were the increased cost of projects, and the delays, and the difficulties with insurance,

props and locations only added to the budget of production. Moreover, there was a great number of extra costs due to the COVID guidance, as the producers were required to provide medical masks and hand sanitiser on set, as well as hire COVID supervisors to coordinate activities. According to Knight's personal experience of helping with a film production around August 2020,

There was some strange cost, for example, when they were filming, they needed to hire a trailer of mobile toilets, and each of them cost 200 pounds a day. But, because of the social-distancing, the toilets could not be in use at the same time, the production team had to tape up some toilets, so you could only use every the other ones, for that, every crew needed two of the toilets. By 7 days a week, that was 1,400 pounds per week, for 5 weeks, that was 7,000 more expensive, just because you needed more toilets. ([Interviewed by the author, 2022e](#))

In this context, Knight ([2022e](#)) noted that "I don't have the sources, but I was informed about the estimation that the production cost rises about 30% under COVID."

Despite the increased production costs, most productions restarted from the summer of 2020, as the streaming wars drove an unprecedented demand for content, and film and High-end TV production has boomed in the UK since 2021. *The Hollywood Reporter* ([2022](#)) notes that, "according to new figures from the British Film Institute, film and high-end TV production topped 5.64 billion pounds (\$7.67 billion) in 2021, a new record and way ahead of pre-pandemic production levels (which were already soaring)." Under these circumstances, production companies faced a severe skills shortage, as *The Guardian* ([2022](#)) reports, "behind the scenes of the British production boom a crisis is looming: sources suggest that a shortage of as many as 40,000 workers will have arisen by 2025 – with shooting schedules already affected."

The skills shortage has increased the tension between inward investment projects and independent films. On the one hand,

Netflix, Amazon and Apple are all understood to have reserved so many UK crew members via costly hold deals for future shoots that even a company such as Working Title is having to really rely on its strong relationships to crew up its upcoming projects." ([Tutt, 2021](#)).

On the other hand, according to an interview in *Screendaily* (2021), “Loran Dunn, an independent producer said, “You just can’t work in the same way. The whole thing takes longer. I worry if I am still going to be able to get the regular crew that I like to work with as there are going to be other productions offering much more money. How can you compete? I don’t know.”

Notably, UK independent film and TV producers may continue facing uncertainty as the British Film Commission updated its COVID safety guidelines following the end of all legal COVID regulations in England on February 24 2022. In the latest guidelines, “the legal requirement to self-isolate upon a positive COVID result has been scrapped, although isolation is still advised, and free universal symptomatic and asymptomatic testing will also end for the general public in England from April 1 2022.” (Tabbara, 2022c). In a recent interview with Nicky Bentham, producer of *The Duke*, founder and producer at Neon Films, and member of the council at film and TV producers’ organisation Pact, she declared,

It will be harder to insulate film and TV sets. Productions may welcome a reduction in the extremely costly protocols, but the real concern is around, and what options will be available if the PRS [Production Restart Scheme] closes for applications at the end of April, as it is currently scheduled to. It’s incredibly difficult for producers, especially those working in the independent space, to effectively budget and plan for shoots happening later in the year. (Tabbara, 2022c).

Therefore, the greatest challenge for the production sector has been the uncertainty caused by COVID-19, because an unpredictable environment inevitably affects shooting schedules and drives up production costs. Although the government and the BFI have developed policies that should provide the production sector with sufficient economic support, which I discuss in section 6.3, independent production companies are at greater risk in the post-pandemic era, as they may experience further challenges, such as the skills shortage and increasing production costs.

6.2.2 Challenges for distribution and exhibition

Like film and TV production, before the outbreak of COVID-19, UK cinemas were booming, according to the BFI (2020h), “despite the recent disruption

caused by streaming services, UK cinema attendance remains high across the country with 36 million tickets sold in Q1 of 2020". However, all UK cinemas were closed in March 2020, along with the national lockdown. This government's policy inevitably resulted in worries for cinema managers and owners. Phil Clapp (2022d), the Chief Executive of UK Cinema Association, recalled that "from the early March of 2020 to the end of April was a very uncertain period, no one really knew how long it would last, no one really knew what the type and level of the government support would be."

The cinemas business clearly needs both audiences and films to maintain itself, but the pandemic jeopardised both. First, the closure of cinemas resulted in an evident loss of cinemas' income, and "the BFI's Research and Statistics Unit show that £3.5m a day in box office revenue is being lost (three times the equivalent estimate for UK theatres by the Arts Council), as well as an additional loss of £2.2m when revenue from refreshments and advertising are included." (BFI, 2020h). Clapp (2022d) remonstrated that "all of the members of UK Cinema Association, except one or two, all the thing they do is to run cinemas, so when the customers stopped arriving, the income stopped." As *The New Statesman* (2021) also noted that "admissions dropped by 76 per cent and cinemas lost more than £1bn in ticket sales compared with the previous year [of 2019]."

Second, the lack of theatrical releases also made it difficult to attract audiences back to cinemas when the cinemas were allowed to reopen for a short time in 2020. "In 2020, the only UK film to receive a traditional release was Christopher Nolan's *Tenet* (which many speculated was the demand of the director), and despite being a lifeline for many cinemas, the film failed at the box office, making a loss of between \$50-\$100m." (Myrmus, 2021). In this context, many Hollywood films that were due for theatrical release were held back or premiered online, and there is no denying that the global lockdown has driven people to streaming, *The Guardian* (2020) noting that,

Hollywood studios have seized on theatre closures during the pandemic to experiment with digital releases, infuriating theatre owners who rely on the once sacrosanct model of big screen exclusivity for months on end to make their finances work.

The lockdown and the release of Hollywood's blockbusters online then led to the third challenge to cinemas, due to the changes of distribution mode and audience's viewing habits. The BFI (2020h) suggested that "the concern

is that it could be considerably harder to coax audiences back to cinemas as their expectations around content availability will have altered during lockdown as well as fears for their safety.” As cinemas reopened from May 2021, Jason Wood (2021b), artistic director of film and culture at HOME cinema in Manchester, pointed out that “the financial impact is obviously seismic. We are operating with two-metre social distancing so go from being able to sell over 500 cinema tickets to just over 100.” Phil Clapp (2022d) also noted although studio films have attracted much of the audience back to cinema, there has been a loss of older customers, and some mid-budget films were unable to achieve satisfactory box office results. Anna Hornaday (2022), from *The Washington Post*, demonstrated that “according to a 2019 market study by the Motion Picture Association, viewers above age 40 accounted for about 40 percent of frequent film-goers in pre-pandemic times; getting them back is crucial for the industry’s survival.”

Not only was safety a concern for audiences going back to cinemas, but the online release of blockbusters also made the cinema-going seemingly unnecessary. During the lockdowns, *Trolls: World Tour* and Disney’s *Mulan* were released online as premium video-on-demand releases for subscribers with an extra fee. Furthermore, a decision by “Warner Bros was regarded as “unprecedented, [as] it has significantly shortened the theatrical window. All 17 of the films it will release next year, from *The Suicide Squad* to *Godzilla vs Kong*, will stream on its HBO Max service for the first month when they also premiere in cinemas.” (Sweeney, 2020). The new distribution mode may ultimately change the audiences’ habits, as going to the cinema for theatrical premieres becomes seen as optional.

Another challenge for UK cinemas is the lack of domestic content, a problem particularly apparent during the COVID-19 pandemic. Although the pandemic was not the main cause of the problem, the COVID-19 has clearly worsened the situation. Clapp (2022d) pointed out that,

When COVID hit the globe, especially with a lot of American cinemas closing, the film studios just didn’t want to release films. For a number of European territories, in the absence of studio films, they were able to rely on domestic production of quality and with a level of audience engagement. However, for a variety of reasons, in part [because] we share the same language with the US, we [UK film industry] don’t have the same strong support and recognition

for domestic films.

Jason Wood suggests that, the best way to encourage people back to cinema is to offer “a genuinely brilliant and diverse programme that reflects the best in world cinema and which is engaging, entertaining, accessible but also not afraid to deal with pressing social and political issues” (Rosser, 2021b). But UK cinemas were deprived of a diverse range of films when US studios stopped providing content because of the paucity of domestic fare.

Therefore, how to ensure a safe environment for audiences and workforce, and how to maintain the UK cinema business model and how to provide an attractive film programme that represents a diverse culture remain as critical questions for UK cinemas, and new policy initiatives may be necessary to answer these questions.

6.2.3 Challenge for audiences

As mentioned above, the closure of cinemas and the boom in streaming during the pandemic have inevitably changed the audiences’ experience of watching films.

During the lock-downs, watching online and streaming films and TV at home became an essential activity. *The Conversation* (2021b) noted that “when told to stay at home during the first lockdown in the UK, for example, people watched an average of more than six hours of TV and online video content each day, a rise of about 30% compared to the previous year.” In this context, COVID is changing how people watch and engage with films, and the abrupt changes may become a double-edged sword for audiences.

On the one hand, as the distribution model changes, the access to films is broadened for people, and viewers now have had more platforms on which to watch film and TV shows than ever. *Business Insider* (2022) noted that “The streaming market has grown a lot in recent years, with newer services like Paramount Plus, Peacock, Discovery Plus, and HBO Max launching to compete with industry juggernauts like Netflix, Hulu, and Disney Plus.”

On the other hand, the audiences could be expected to pay higher prices than cinema tickets to watch a film premiere online. For example, Disney’s blockbuster *Mulan* cost an extra \$30 for Disney Plus subscribers, who were already paying \$7 a month. While the price is considered rather high, Elaine Low (2020), the senior reporter at Variety, explained,

If you're a part of a family of four living in LA like I am, then going to the movies easily winds up costing close to \$100 when you factor in tickets, parking, popcorn. But, you know, if you're one person living in a city where the cost of living isn't that high, then \$30 is a lot of money for one movie. And it's likely to put off some people.

Besides the extra cost of watching films like *Mulan* on Disney Plus, people's spend on streaming has increased during the pandemic, according to *CBS News* (2022)

Before the pandemic, the average household had one to two subscriptions...Now it's four to five. Streaming consumption is off the rails given what we've seen with many working from home and streamers ramping up their services.

Moreover, since early 2022, "streaming services including Amazon Prime, Disney+, HBO Max, Hulu and Netflix are upping their monthly subscription fees now that they've gained a foothold in the market and can count on more consumers cutting the proverbial cord." (Cerullo, 2022). Given the diversity of content available on various streaming platforms, subscribers are likely to spend more time and money on streaming in the post-pandemic era.

Apart from the economic burden for subscribers, there is the controversy about whether people benefit from cinema-going from a socio-cultural perspective. Cinema-going is indeed not only about enjoying films, but also a part of social life, however, as not everyone has immediately adapted to a 'new normal life' after COVID, cinema-going could also be difficult for some people. When cinemas were reopened, Mike Popham (2021) lamented to *VOX* that "there is no substitute for laughter rippling through an audience or a collective gasp happening at a big moment in the story. It's a social experience, and if anything, I didn't appreciate it enough pre-pandemic." At the same time, some people preferred to watch films at home and the pandemic has reinforced this habit, Nate Rethorn (2021) claimed that "for smaller films that we go to see at our localish indie theatre, it's always been a good experience. But I'm less interested in dealing with people who disrupt the theatre and [I] would rather stream a film at home with all of those trade-offs." Furthermore, the safety of cinema-going has also been a serious concern of some older people, Stephen Griffin (2021), a virologist at Leeds University, told *The Guardian* when *No*

Time to Die was released in the UK in September 2021, “if you have 300 people in the cinema, the average chance is you’ll have three to four people infected in that cinema. Are these things safe? The honest answer is you can’t say, it’s completely risk-free.” Thus, the risks of cinema-going may have prevented some film fans from attending cinemas, especially the vulnerable and the older people. As the society opens up, audiences are under greater risks of contracting COVID and more hesitance is expected.

The challenges that were faced by the screen industry were substantial, and were distinctive in different sectors, while also interconnected at the same time. The interruption of productions in the UK not only resulted in the delay of inward investment projects, but also significantly damaged independent productions, the escalated budget and loss of skilled crews leaving independent filmmakers in crisis. The lack of independent productions not only had a socio-cultural impact, leading to less British content being screened, but also affected cinema revenues due to the lack of content to attract audiences when Hollywood studios turned to online distribution. Inevitably, the audiences’ viewing habits were altered during the lock-downs, and although it remains debatable whether the rise of streaming will cause a further decrease of box office revenue, there is no denying that if audiences would rather pay for a subscription fee than cinema tickets, cinema culture and the creative industries could face a more challenging situation in the post-pandemic era. All of these issues will need careful consideration by policymakers.

6.3 Government funding, corporate initiatives, and their effects

As documented in previous sections, the development of the UK screen industry was an important stimulus to the UK economy before the pandemic. Rishi Sunak (2021d), the former Chancellor and the current Prime Minister, recently boasted that “the UK is home to some of the best creative talent in the world, and our TV and film industry is a jewel in our crown, driving hundreds of thousands of jobs and billions for the economy.” The growth of the global streaming market has increased the demand for original content, and the tax relief scheme have made the UK an attractive place to film. Meanwhile, the socio-cultural impact of the screen industry is increasingly valued by governments, as “Britishness” in film and TV is regarded as a way of pro-

moting the national image and national cinema. According to *Independent's* report,

Nearly three-quarters (70%) of global audiences view “Britishness” as a mark of high-quality film and TV, according to a new report. A study commissioned by the Department for Digital, Culture, Media and Sport’s (DCMS) UK Global Screen Fund looked at the impact of the screen industry abroad as well as its future. A third (30%) of adults said British film and TV influenced their view of the country. Two-thirds (66%) of respondents who had previously visited the UK said seeing famous British locations and landmarks on screen influenced their decision”. ([Green, 2021](#)).

As a result, when COVID hit the screen industry, the policy response and economic support of the government and related organisations became crucial not only for the survival of the screen industry, but also to the sustainability of the UK economy and UK soft power.

This section will examine the government and corporate initiatives introduced to support the screen industry during the pandemic, and whether these have been sufficient for companies and individuals. It is worth noting that industrial guidance and support for productions and cinemas based in Northern Ireland, Scotland and Wales may differ, due to relevant different Government guidance, this section primarily focuses on the policymaking in England.

6.3.1 Socio-cultural support from the Task Force

The DCMS’s response to the COVID was swift, and following the first national lockdown, the DCMS launched an inquiry in April 2020 to “gather experiences from the diverse sectors under our remit on how COVID-19 was affecting them.” ([DCMS, 2020](#)). Subsequently, in May, the BFI convened its Screen Sector Task Force to help deal with the great challenges presented to the film industry. BFI chief executive Ben Roberts said that “the organisation was keenly aware that the wide-ranging and damaging impact of the virus is being felt across the entire industry and at every possible level.” ([Dams, 2020a](#))

The BFI’s Task Force grew from an initial from 30 to more than 100 senior representatives from film, TV, animation, VFX and video games. The aim of the Task Force was to develop a guidance for returning to work in a manner that safely manages the risk posed by COVID-19. The Task Force operated

through five sub tasks: the Inward investment sector was chaired by the British Film Commission, the Independent film production sector was chaired by the BFI, the TV production and broadcasting sector was chaired by PACT, the distribution and exhibition sectors were chaired by UK Cinema Association and Film Distributors' Association, and there was also a video games sector.

The Task Force was also intended to pivot to consider the long-term issues facing the industry that have been exposed or exacerbated by the COVID-19 crisis, including topics such as workforce stability and the sustainability of UK independent film. (BFI, 2020h). As I have pointed out that skills shortages and independent film were the screen industry's existing challenges before COVID. The Task Force agenda demonstrates that the BFI has recognised the problem and aimed to prevent this problem from exacerbating in the post-pandemic era.

The BFI thus demonstrated that it had very effectively taken on its responsibilities as a leading agency of the screen industry, coordinating different institutions and organisations to support people in the industry. Ben Roberts highlighted that the Task Force aimed to “brings together organisations from across the full breadth of the UK's screen industries, to develop a coordinated response to the COVID-19 crisis and shape how to get the sector back up and running quickly and safely.” (Film Hub South West, 2020). Roberts also told *Variety* that “we are focused on ensuring the resilience of the industry and on tackling the huge range of short to mid-term financial, cultural and societal challenges — not least to the exhibition and freelance sectors who are likely to be hit hardest most immediately by the crisis.” (Dams, 2020a). In this context, the most urgent task was indeed to maintain the sustainability of freelance crews and cinemas, as their activities were abruptly paused due to COVID-19.

In practice, the five sub groups of the Screen Task Force have provided detailed socio-cultural support for the screen industry under COVID, the different organisations focusing on providing health and safety guidance. For instance, “the inward investment group led by the British Film Commission (BFC) has drafted a set of codes of practice for film and high-end television drama production.” (BFI, 2020e). When the government and industry gave green light to the *British Film Commission Production Guidance for Film and High-End TV Drama* on 1st June 2020, the BFC was charged with keeping guidance up to date to coordinate with the government's COVID measures.

Meanwhile, PACT published a series of TV production guidelines in May 2020, and the UK Cinema Association (2020) provided guidelines for cinemas, noting “the main points of reference for cinemas in England are the guidance on ‘Events and Attractions’ and on the use of face coverings.” These measures were intended to ensure social distancing at every point during a visit to the cinema, with a particular emphasis on auditoriums, while online booking and contactless payment was also encouraged in cinemas. (Film Distributors’ Association, 2020a). As such, the Film Distributor Association published detailed guidance for reviewers, claiming that “we would like to provide reassurance that practical measures will be in place to ensure that hygiene and social distancing guidelines are observed.” (Film Distributors’ Association, 2020b). Overall, the socio-cultural significance of the Task Force was its design of guidelines for returning to work and leisure in a safe manner that managed the risk posed by COVID-19.

6.3.2 Various forms of economic support

Besides the health and safety guidance for the screen industry, the Task Force (2020c) also suggested modifying tax relief as a time-limited economic intervention, to maintain the competitiveness of the UK’s creative industries. According to the written evidence submitted by the BFI(2020f),

Restarting production in accordance with [the COVID-safe] guidelines will come at considerable extra cost for productions of all types and budget levels. This increase in costs will lead to a drastic reduction in the number and quality of film and TV shows being commissioned and could mean some projects which had previously secured finance are no longer viable, particularly in independent film.

In particular, the BFI highlighted the case for “an uplift in the rate of relief for independent film and domestic TV projects (including children’s TV, animation TV and HETV) and an uplift in the rate of film tax relief for productions with a VFX spend of £2 million or above, where 75% or more of the VFX spend is taking place in the UK.” (BFI, 2020f). The proposed amendments to the tax reliefs were clearly intended to safeguard the UK’s position as a favourable production destination, as well as to attract further inward investment to ensure a quick recovery of the industry.

Although the proposal to amend the tax relief was not put into action, it demonstrates that tax relief is now seen as an effective policy response, one that has contributed to the boom in UK screen production and attracted international productions back to the UK. In fact, the quick recovery of inward investment productions when the COVID restrictions were lifted, shows that the proposed temporary amendment to tax relief might not have been necessary, as the UK has become an attractive destination for comprehensive reasons that I shall further discuss in the later section.

Apart from the attempt to amend tax relief policy, various funds from organisations and corporate initiatives were made available during the COVID period. For instance, in April 2020 the BFI revealed a £4.6m support package for the UK film industry that included: a £2m BFI film continuation fund, which was made available to independent UK productions interrupted by COVID-19 to help cover unexpected production costs and ensure productions could resume production when practical; a £1.3m BFI FAN COVID-19 resilience fund, linked to the BFI FAN Film Exhibition Fund, which made over £630,000 of National Lottery funding available to exhibitors across the UK and supported activity to re-engage audiences with collective, big screen film experiences at film festivals, mixed arts venues, and both community and traditional cinemas. Meanwhile, in partnership with The Film and TV Charity, £500,000 was allocated to support to workers and freelancers working across production, distribution and exhibition, providing one-off grants between £500 and £2,500. A further £800,000 was earmarked for BFI-funded features, the fund was available for the BFI-funded features that had been interrupted due to the restrictions put in place to curb the spread of coronavirus. As contracts were abruptly cut short, the funds ensured those employed were paid two weeks' notice. (Parfitt, 2020a).

The BFI package introduced at the beginning of the COVID-19 package was designed to support a devastated industry. Creative Industries Minister Caroline Dinenage commented,

Our world-leading screen sector is at the cultural heart of the nation and is one of our greatest success stories. It is fantastic to see the BFI taking a strong lead in helping those in the industry struggling in these difficult times. Together with the Government's unprecedented financial support package [£500 million Film and TV Production Restart Scheme], these measures will help ensure

that the sector continues to thrive and is well placed to recover as quickly as possible.” (BFI, 2020b).

There is no denying that the BFI’s funds provided a degree of assurance to film companies, film crews and freelancers. Ronnie McQuillian (2022f), a freelance documentary cinematographer in London, recalled in the interview with the author, that “I remember there were about five funds available and I successfully applied for two of them, so it was not too hard for me during the lockdowns”.

In addition, not only did the BFI’s package successfully supported people in the industry during the pandemic, but the Film and TV Production Restart Scheme was also an essential scheme that supported recovery of the screen production sector. The Scheme was established by the DCMS, and the objective of the Scheme was to support the film and TV industry to restart production in the UK, as it is recognised that “following the subsequent easing of these lockdown measures, many producers were unable to restart or, for new productions, commence production due to the lack of availability of insurance coverage for COVID-19 related risks, which prevented them from accessing funding from their finance provider(s).” (DCMS and HM Treasury, 2020). In this context, “on 28th July 2020, the Government announced the introduction of a UK-wide £500 million Film and TV Production Restart Scheme...It makes direct compensation available to producers that incur costs caused by coronavirus abandonment or delays to eligible pre-existing and new productions.” (PACT, 2021). As Richard Knight (Interviewed by the author, 2022e) pointed out in his interview, quoted above, production insurance was a very big problem for production companies, but as the government agreed to cover the insurance, most of the productions were able to restart from August 2020. Due to the success of the Scheme, the Government decided to extend it, indicating that it would remain open for applications until 30th April 2022 and will provide cover for claims up to 30th June 2022. (PACT, 2021). ‘

In addition to the government’s production funds, various regional funds were created for independent film and TV productions. For instance, as early as April 2020, the Leeds City Region Enterprise Partnership (the LEP) in association with Screen Yorkshire set up a new funding initiative, totalling £200,000, to support the Leeds City Region’s TV and film industries. The fund aimed to distribute awards of between £2,500 and £25,000, to help independent TV and film production companies to develop new content. (Screen

Yorkshire, 2020). At the same time, “Screen Scotland offered support of between £3,000 to £50,000 to enable Scottish independent producers to develop projects over the next three-to-six months, as part of a £1m pot – split between TV and film projects.” (Tilley, 2020).

Cinemas also received support, from Arts Council England’s the Culture Recovery Fund, which was designed to help Britain’s culture, arts and heritage organisations including independent cinemas hit hard by the pandemic. Between August 2020 and March 2022, the Culture Recovery Fund has distributed £1.57 billion to around 5,000 organisations and sites across the UK. (Rosser, 2022b). On 31 March 2022, “Culture Recovery Fund: Emergency Resource Support second round” was announced by the Arts Council England, and the final £31 million package was awarded to 302 cultural arts, culture and heritage organisations. (Arts Council, 2022). In this context, Ben Roberts, Chief Executive of the BFI, highlighted that “every penny of the Culture Recovery Fund including over £500k in this final round of funding to independent cinemas across the country has been vital to their survival, enabling them to recover and welcome back their audiences.” (UK Government, 2022b). *oScreendaily* (2021b) reported,

Cinemas in England are among the leisure and hospitality businesses eligible to access the UK government’s emergency funding measures introduced today (December 21) to help mitigate the economic impact of the Omicron variant of COVID-19...The £2bn Culture Recovery Fund will also be topped up by £30m. It is understood that cinemas impacted by COVID-19 will be able to continue to apply to the Fund.

The extra funding for cinemas demonstrates that the cinemas business has been significantly valued, furthermore, the government’s support to the UK exhibition sector has also been rather unprecedented, as I have noted in Chapter 3, the government’s historical policymaking and support had focused on production sector. As such, the unprecedented support also indicates that distinctive from the production, cinemas had more difficulties recovering from the pandemic.

Cinemas have not only been eligible for continuous support from various funds, but the wider policy response was also friendly to cinema venues. The government granted businesses in the retail, hospitality and leisure sectors in England exemption from business rates for the 2020 to 2021 tax year. (UK

[Government, 2020a](#)). In addition, the Expanded Retail Discount continued to apply in 2021/22 at 100% for three months, from 1 April 2021 to 30 June 2021, and at 66% for the remaining period, from 1 July 2021 to 31 March 2022. ([UK Government, 2021a](#)). Furthermore, the retail, hospitality and leisure relief replaced the retail discount on 1 April 2022, indicating that cinemas could get 50% off the rates bills for the 2022 to 2023 tax year. ([UK Government, 2022a](#)). Thus, the tax breaks applied to the cinema industry during the COVID pandemic have guaranteed the survival of and some profits for the business.

Notably, while the production and exhibition sectors have received significant support, the Government's furlough scheme was also essential to keeping people in the industry. According to *The Times* ([2021c](#)),

Between March 2020 and June 2021, the government was paying 80% of furloughed people's wages with a monthly limit of £2,500...The furlough scheme came to an end on 30 September 2021...The scheme has been used by 11.5 million workers since it launched in March 2020.

Phil Clapp, the Chief Executive of the UK Cinema Association, also considered the furlough scheme a game-changer for UK cinemas, according to Clapp ([2022d](#)),

The furlough scheme was the key support scheme for the UK cinemas, allowing companies to pay staff, to keep staff engaged and will at least have some hope when the cinemas will be allowed to reopen again, they wouldn't have to recruit the whole new range of people and train the new range of people.

Meanwhile, Clapp revealed,

One of the features of the furlough scheme in the UK, comparing to other European territories, is that people who claimed furlough were able to pick up other jobs, so there was probably more of the impact of people who have done another job for three months, and they quite like the job, they like the flexibility and the pay. So it wasn't the case that we had a group of people who worked for cinemas in March 2020, and we picked up the same workforce in July 2020, but it at least it allowed some confidence in the industry that there would be some support.

However, freelancers who worked in the production sector may have had difficulties with the furlough scheme, “*BECTUR*, for instance, pointed out that the stop-start nature of freelance work means many workers were not under contract on 1 March, the government’s cut-off points to receive help. A survey by the union suggests that almost 50% of film industry freelancers won’t qualify.” (Pulver, 2020). In this case, the chancellor, Rishi Sunak, announced a follow-up scheme, which meant that “self-employed people would wait until June to get 80% of their earnings covered by the state, up to a maximum of £2,500 a month for three months, in response to the coronavirus crisis.” (Mason & Proctor, 2020).

Corporate initiatives such as those introduced by Netflix also provided a certain amount of support to people in the production sector, *The Guardian* (2020) noted in March 2020,

Netflix has set up a \$100m fund for creatives whose jobs have been affected by the ongoing coronavirus pandemic...The majority of funds will go towards those affected by the collapse of Netflix’s own productions, such as season two of *The Witcher* which was shut down when the actor Kristofer Hivju tested positive for the virus.”

Although the Netflix funds primarily benefited the Netflix productions based in the UK, they were nevertheless an additional source of economic support for the production sector.

It is clear that the funds made available to film companies, film crews and freelancers have been sufficient, and that various forms of economic support have contributed to the survival of the screen industry. These economic measures enabled the screen industry to quickly recover from the pandemic, while the Task Force provided health and safety guidelines to prevent the spread of COVID-19.

6.3.3 Effects of the policy response and support mechanisms

The quick response of the BFI and the government were praised by the screen industry and helped its recovery. *Variety* (2022), for instance, complimented the achievement of the Film and TV Production Restart Scheme, which “supported 95,000 jobs and led to a record £5.6 billion production spend, according to the U.K. Department for Digital, Culture, Media and Sport (DCMS).

“Peaky Blinders,” “Killing Eve,” “Gangs of London” and new film “The Phantom of the Open” were among productions supported by the scheme.”

Meanwhile, the UK was considered by international investors as one of the safest countries in which to shoot for international investors, *Screendaily* (2021d) reported, “in 2020 film and high-end TV production spend in the UK was over \$3.9bn (£2.84bn), with inward investment representing \$3.3bn (£2.36bn) of that total.” Furthermore, “inward investment spend on Film and High-End TV in the UK top[ped] £4.713 billion in 2021, record levels of inward investment production spend reinforce[ing] UK’s position as a leading global production centre.” (British Film Commission, 2022a). The varied productions contributing to the inward investment include “Warner Bros’ The Batman, Universal’s Jurassic World: Dominion and Sony’s Cinderella, UK-European co-productions Christian Carion’s English remake of his 2017 film My Son, Ruben Ostlund’s Triangle Of Sadness and Pablo Larrain’s Spencer, and home-grown projects such as Kenneth Branagh’s Belfast and Eva Husson’s Mothering Sunday.” (Sweeney, 2021a).

The return of inward investment projects is not only due to the safe environment encouraged by production guidelines, but also because the wars between streaming giants and broadcasters have pushed big budget production in the UK, spending on film and high-end TV productions in the UK. As *The Guardian* (2021a) noted, a “Huge growth in content demand pushe[d] broadcaster and streaming services’ spend to almost double the pre-COVID record”. Furthermore, the combination of the tax relief policy, strong talent base and a highly skilled workforce, has given the UK a competitive edge as a location of choice. As the BFI (2020g) claimed that “they have worked alongside our world class infrastructure and skills base to make the UK one of the world’s leading destinations for production, securing a rising levels of inward investment across recent years as well as enabling homegrown talent to create distinctive UK content.” In this respect, the existing film policies and support packages, such as the tax relief policy, have played a critical role in building the UK’s screen sectors into a global cultural and commercial success story during and after the worst of COVID.

Meanwhile, the UK exhibition sector has survived the COVID threat after going through immense turbulence, as it has benefited from the business rates holiday, the VAT reduction and the government’s furlough scheme, as well as being supported by the BFI FAN COVID-19 Resilience Fund and the Cultural

Recovery Fund. According to Phil Clapp (2022d),

There was a significant amount of financial support, coming out of the second lockdown in May of 2021. What we saw was, we in vertical, almost lost no cinema sites. I think one or two were closed, they were sites that were supposed to close anyway, but COVID speed it up. The strange situation is, coming out of the COVID, we had more cinema sites than we had going in the COVID, because there were 6 or 7 sites which were opened during the first 'unlock' in 2020.”

The increase of cinema numbers after COVID on the one hand, represented the confidence of the exhibitors to cinema-goers, on the other hand, it “demonstrated the resilience of the cinema model” (Interviewed by the author, 2022d).

Therefore, although the screen industry still faces certain challenges, it has bounced back quite quickly from COVID. In particular, due to the clear COVID guidelines and the government’s coverage of production insurance, the UK is now regarded as one of the safest places to film. The expansion of the number of streamers making content in the UK and the increase of inward investment has contributed to the unprecedented boom of the production sector. There is no doubt that the government and the BFI have reacted fast to support the screen industry during the pandemic. The detailed guidance and the funding made available have boosted the confidence of the UK and global film markets to a great extent. In this context, the UK screen industry has not experienced devastating losses as a result of COVID. However, as COVID has not been ultimately eliminated, it is necessary to acknowledge that the impacts of the pandemic may also last, as not only have the audiences’ habits been permanently altered, but also problems in the exhibition and production sectors may be revealed in a few years after the pandemic. In the next chapter, I will examine the new picture of the UK screen industry in the post-pandemic era.

6.4 Conclusion

To conclude, the unexpected outbreak of COVID-19 interrupted the flourishing of the UK film industry, which faced unprecedented challenges during the pandemic. The various lockdowns not only had a dramatic effect on the economy in general, but also on the hospitality and entertainment businesses in

particular. The film production and film exhibition businesses would have really struggled to survive if there hadn't been various forms of government and the BFI's support in place. The cinema business depends on people being able to go to the cinema and for film production to produce content, thus the work that could be done from home was very limited. The lockdowns could have been devastating for production companies, freelancers, talents and crews if there hadn't been concerted efforts to develop COVID-safe ways of producing films, and many people would have lost their jobs if it hadn't been for the government's furlough scheme. Under these circumstances, the industry could hardly gain its footing without the government's and the BFI's support. In order to support and guide the industry through the pandemic, the government and the BFI quickly took action through policymaking, lobbying and providing the industry with various aids. Some of the support was general economic support. But some of it was industry specific, and the BFI and others had to put pressure on the government to provide this industry-specific support.

In this context, the government's policy response became essential to the survival of the industry. In particular, the Film and TV Production Restart Scheme, covering the insurance for production companies, and effectively boosting the confidence of UK producers. Meanwhile, the significant amount of financial support offered to UK cinemas also contributed to the increased number of cinema sites in 2021. In this sense, the screen industry has successfully survived the pandemic with the help of the government's policy response. Apart from the newly developed subsidies from the government and the support of the BFI, the existing film policies, such as tax relief, also contributed to the recovery of the screen industry, and successfully attracted international investors back to the UK under the guidelines of the BFI's Task Force.

Thus, it may be concluded that the government and the BFI have done three things right in response to COVID-19 pandemic: first, the BFI formed a timely and coordinated response to the COVID-19 crisis, and the guidelines guaranteed the screen sector running quickly and safely during the pandemic. Second, the Film and TV Production Restart Scheme, supported by the DCMS, covered the new insurance costs for the production sector, which helped production companies bounce back quickly from the damages caused by the pandemic. Third, the furlough scheme to a great extent prevented the loss of skilled workers and cinema staff. Under the auspices of these interventions and in the context of the tax relief policy, the UK became one of

the most popular locations for international productions, and the increasing inward investment has inevitably contributed to the stability and even growth of the creative economy.

The case of the screen industry during the COVID-19 pandemic demonstrated the significance and impact of policymaking and government intervention during a period of crisis. However, it is worth noting that the independent sector has been hit most by the pandemic, and it will require various further forms of support from the government, the BFI and the industry, as the independent sector not only needs financial support for productions and marketing, but also needs an innovative distribution or exhibition model to attract audiences. Whether and how the government and the BFI will deal with the situation in the next decade shall be examined in the next chapter.

Chapter 7

The BFI's next 10-year-strategy

After examining the BFI's global and domestic strategies since 2010, it is necessary to discuss the BFI's policymaking in the post-pandemic era, and its capacity to address the challenges currently facing the screen industry. As we have seen, there had been strong growth in the screen industry right before COVID-19 hit, and the government and the BFI offered various forms of support to the screen industry during the pandemic. In this final chapter of the thesis, I shall first look at the new landscape of the screen industry, shaped by Brexit and the pandemic, and the policies developed to support the industry during the COVID period. I shall also ask what new policies are being or need to be developed for the post-pandemic and post-Brexit period? In September 2022, the BFI launched Screen Culture 2033, a new 10 year vision for UK screen culture and the screen industry, setting out its plans for the next decade and how these may benefit the screen industry and society. In the second part of the chapter, I will analyse this innovative new strategy and the associated lottery funding plan, based on the materials available at the end of October 2022. In doing so, I shall examine whether the BFI's next 10-year-strategy is able to deal with the challenges currently faced by the screen industry. Furthermore, as the BFI enters its third strategic phase, I will also assess the development of the BFI and its role in the near future.

7.1 The screen industry in the post pandemic era

Having considered the government interventions during the pandemic and their effects in Chapter 6, it is now necessary to look at the inevitable changes

brought about by the pandemic and the situations in the film industry, at the time of the start of the BFI's new strategy. The exhibition sector, the distribution sector and the production sector are interconnected, and any change in one sector will inevitably affect the other sectors; thus, by focusing on the development dynamics of UK cinemas after the pandemic, I will also be able to address key changes in the production and distribution sectors.

7.1.1 The distribution and exhibition sectors in the post-pandemic era

When considering the challenges faced by cinemas, during the pandemic, whether audiences would return to cinemas post-COVID became a critical question for UK cinemas. Many still believed that the big screen could thrive after the pandemic. Ahead of the cinemas reopening in 2021, a nationwide survey, carried out by the research agency MetrixLab and commissioned by the Film Distributors' Association, revealed "a steep rise in urgency to return to cinemas as soon as possible, with 40% of audiences planning to return within the first few weeks after reopening and a further 36% within the first couple of months." (Cinema First, 2021). The cinema-going experience is clearly essential to some audiences and the big screen experience is something that cannot be recreated at home.

Economically, the box office performance of blockbusters is still seen by some as crucial for film studios. For instance, as noted in Chapter 6, Christopher Nolan released his film *Tenet* in the theatre when COVID-19 cases were still surging; the director commented that "it's not just an artistic choice, in the current industry in which we work, there's no path to profitability for a film like this that circumvents movie theaters." (Jurgensen & Watson, 2020). Nolan thus indicated that cinemas, not streaming platforms, would still play the dominant role in the post-pandemic world.

However, some believe that the landscape of cinema may undergo a permanent change in the post-pandemic era. As again noted in Chapter 6, some Hollywood studios changed their strategies to experiment with online releases during the pandemic, and these experiments may ultimately affect the relationship between studios and exhibitors in the post-pandemic era. As Jeet Heer (2020) from *The Nation* pointed out,

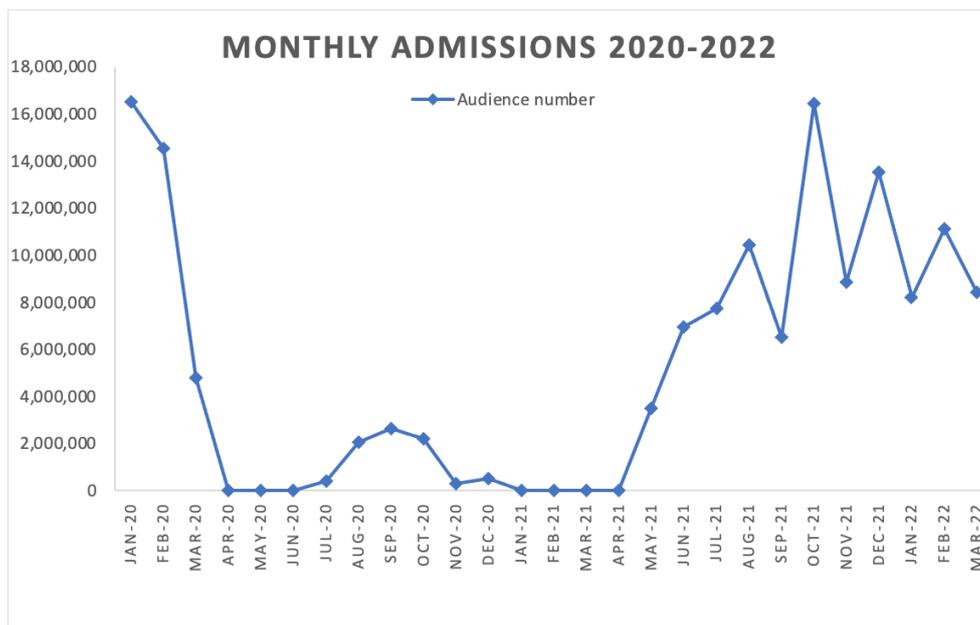
For media giants like Warner Media, COVID-19 is a wonderful alibi. It allows them to disguise their murder of the movie-going

experience as death by natural causes. It's entirely possible that the long-term project of companies like Disney and Warner Media is to drive independent movie chains out of business and then set up their own theater chains, so they won't have to split the profit.

In a 2021 essay, director Martin Scorsese also expressed his concerns about what he saw about the decline of the film industry and claimed that “everything has changed— the cinema and the importance it holds in our culture...I suppose we also have to refine our notions of what cinema is and what it isn't.” (Scorsese, 2021).

It is worth noting that, when scholars and the press mention UK cinemas, they often refer to the multiplexes, and there is no doubt that multiplexes represent the majority of UK cinemas. According to *Statista* (2022), “Cineworld, Odeon, and Vue are the top cinema chains in the UK in terms of revenue, and accounted for almost 70 percent of the exhibitor market combined.” However, UK cinemas also include independent cinemas, while the streamers are also essential exhibitors in the UK. The pandemic has had various impacts on these exhibitors, and I intend to discuss the different situations that these exhibitors face in the post-pandemic era, and the approaches they are taking towards the current challenges. Meanwhile, as distributors work closely with exhibitors, any change of exhibition model will inevitably affect the distribution model, thus, I shall discuss both sectors at the same time.

First, I will examine the post-COVID strategies of the multiplexes, as it is these exhibitors who may have experienced the greatest turbulence since the pandemic. According to the latest figures from UK Cinema Association (2022) (presented in Figure 7.1), UK cinema monthly admissions after the pandemic have still barely reached pre-pandemic levels. There is no denying that October 2021 saw exceptional results due to the release of *No Time to Die*, the highest-grossing English language film during the pandemic era. The Bond film was considered by the Film Distributor's Association as a showcase of the theatrical market's post-pandemic recovery. (Film Distributors' Association, 2021). In addition, the rise of admissions in December 2021 benefited from another Hollywood blockbuster, *Spider-man*, Cineworld (2022), one of the UK's largest exhibitors, told *Independent* that “its recovery was boosted by a “particularly strong” December [2021] due to bumper audience numbers for the latest Spider-Man film.” However, monthly admissions declined sharply when the blockbusters were unavailable in cinemas, and the figures below thus



Source: Cinema Advertising Association (CAA)

Figure 7.1: The monthly admissions from 2020 to 2022.

reflect an unstable and unsustainable situation of cinema admissions at the current stage.

While underscoring the importance of the blockbuster, the second issue I will examine is the concerns of multiplex chains about premium exhibition rights and the length of theatrical window, which refers to the amount of time between a film arrives a cinema and when it can move to streaming or other mediums, in the post-pandemic era. A certain compromise was made between studios and exhibitors to shorten theatrical windows as when cinemas closed during the pandemic. *Screendaily* (2021) noted that “Cineworld announced it had agreed a multi-year pact with Warner Bros under which, starting in 2022, its Regal cinemas in the US will carry the studio’s films for 45 days before they go to HBO Max. In the UK, the window will be 31 days.” Under certain circumstances, “there will be an extended window of 45 days for films that open and meet an agreed-on box-office threshold. Films likely to have a 45-day window include huge blockbusters such as *Fantastic Beasts 3* and *Aquaman 2*.” (Aftab, 2021). This demonstrates that the length of the window for exclusive theatrical exhibition of films is gradually shrinking.

Following on from its agreement with Warner Bros, Cineworld has reached the same deal with Universal on theatrical windows. (Tartaglione, 2021).

Deadline (2021) also commented on the changes during the pandemic, stating

The fact that a deal has been achieved between Cineworld and Universal is indeed indicative of the new order of things post-COVID as inherent, if sometimes contentious, partners have shown flexibility during an unheard of period.

Notably, this deal was not the first time the theatrical window had been shortened. Changes to the theatrical window have often been the focus of power struggles between film studios, distributors and exhibitors. Peter Fader (2009), a marketing professor, explained that

In the old days, the release window existed because it was impossible to release movies simultaneously. There were only so many copies of the film. Movies would start in New York or Los Angeles and work across the country. That release window was created for logistics...[Studios] should not want to do windowing at all. They should get business to a point where it can deliver content as broadly as possible.

In Fader's opinion, studios had to do windowing because film distribution was constrained by technology, which would explain why the release window might be expected to change in the digital age. Hasan Bakhshi (2017) also noted,

In the earliest studies [of theatrical release windows], the window reflects the trade-off that distributors face between so-called 'cannibalisation' and 'marketing' effects. Distributors prefer longer windows to the extent that they protect box office revenues (cannibalisation effect), but shorter windows in so far as this lets them capitalise on DVD sales while a film remains fresh in the minds of the public (marketing effects).

Fader and Bakhshi's statements demonstrated that exhibitors, distributors and producers often have different interests and attitudes towards the windows. The cinema owners prefer longer windows, while studios desire to recoup their large investments quickly by shortening the theatrical windows, and moving their films more quickly to other screening platforms. At the same time, distributors use various distribution models designed to maximise revenue.

In this context, there is no doubt that the conflicts between cinema companies and film studios have intensified in the digital age, but as noted, the studios had attempted to shorten the theatrical window before the outbreak of COVID-19. Bakhshi (2017) pointed out that “the window between a film’s release at the cinema and on DVD/video rental fell on average by one-third from 190 to 125 days between May 1999 and April 2006.” By 2017, *Screendaily* (2017) also noted, “mainstream releases in the UK [were] held to four months of exclusivity in cinemas before their home entertainment release, even if those films play[ed] on screens for just six to eight weeks at most.” This resulted in a “rights freeze”, indicating a period in which, films were not available in any format. (Macnab, 2017). The “rights freeze” period would certainly not benefit the studios and has exacerbated their concerns. For instance, Kevin Tsujihara, chairman and CEO of Warner Bros Entertainment, told the press in 2017 that the studio was having very constructive conversations with the exhibitors for the first time, urging the exhibitors to put new films in homes sooner. (Macnab, 2017). As a result of the power struggle between studios and cinemas, in the pre-pandemic decade, the exclusive window for cinema was usually 90 days or at least 75 days before home release. (Brueggemann, 2021).

Thus, the exclusive screening for cinemas changed from 190 days to 125 days between the 1990s and 2000s, and subsequently declined to 90 or 75 days between the 2000s and 2010s. Then in the 2020s, the window was shortened from 45 days to 31 days due to the impacts of COVID-19. The change of windowing in the 2020s was largely the result of digital distribution, but the studios took a more aggressive approach to their windowing strategies during the outbreak of COVID-19 and the subsequent lockdowns. As *Variety* (2021) observed, “movie studios used the pandemic as an excuse to experiment with various release models for many of its biggest movies, most of which involved simultaneous debuts in theaters and on demand or streaming services.”

The pandemic gave film studios an unique opportunity to experiment with the distribution models. By highlighting the idea of experiment, I intend to argue that on the one hand, blockbusters were not exclusively released in cinemas, for example, Disney announced that *Mulan* was planned for VOD instead of its theatrical release in 2020. On the other hand, however, studios were also not intending to turned their back on cinemas. As textitVariety (2020) noted,

Disney’s CEO Bob Chapek says *Mulan*’s big move isn’t reflective

of a new business model for the company... “We’re looking at *Mulan* as a one-off as opposed to saying there’s some new business windowing model that we’re looking at.”

Chapek’s comment suggests that rather than simply skipping cinemas, Disney was working to strengthen their own streaming platforms, as well as generate as much box-office revenue as possible.

As a result, big film studios have seized the initiative to reach new agreements with the cinema chains, and a new theatrical model has therefore started to emerge since the pandemic, which could also be seen as a compromise with cinemas. Studios and exhibitors agreed to screen films first in cinemas but with a much shorter window. For instance, the *Daily Mail* (2021) noted that “Warner Bros has announced it will screen its movies in theaters first in 2022, bringing to an end its strategy to release all of its movies on its HBO Max streaming service at the same time as they hit cinemas.” According to *Screendaily* (2021a), “Cineworld CEO Greidinger said the move was a positive one and added: This agreement shows the studio’s commitment to the theatrical business and we see this agreement as an important milestone in our 100-year relationship with Warner Bros.”

It is rather surprising that the Cineworld CEO would compliment the agreement, and while it is unclear whether Cineworld has a share in the streaming revenue, some cinema chains may have a share in the digital revenue. For instance, *Variety* revealed that AMC Entertainment and Universal reached a deal over a 17 days of theatrical window, and “AMC’s CEO Adam Aron said the company will “share in these new revenue streams,” which means that it will get a cut of any money made on these digital rentals.” (Lang & Rubin, 2021). Aron, therefore, stood in line with Universal in the following statement:

AMC enthusiastically embraces this new industry model both because we are participating in the entirety of the economics of the new structure, and because premium video on demand creates the added potential for increased movie studio profitability, which should in turn lead to the green-lighting of more theatrical movies. (Munson, 2020).

Despite these changes to windowing policies, “Cineworld was optimistic about its recovery in 2022, hailing a “strong” release schedule.” (Saker-Clark, 2022). The negotiation between the studios and UK cinema chains will con-

tinue in the following years. As Phil Clapp (2022d) said, “I strongly suspect that in years of time, it won’t be a 30 or 40 day window, it won’t be a 100 day window, it will be somewhere between the two, and we [exhibitors] will have more flexibility.”

In fact, even though the multiplex companies appear to be optimistic about the future of cinemas, as they have succeeded in securing the premieres of some blockbuster films, the compromises of shortening theatrical windows indicate that the cinema companies have been desperate to hang on to an old model in which cinema screenings dominate the release pattern. In various ways, the UK cinema admissions have been strongly dependent on Hollywood blockbusters before and after the pandemic, thus, the new deals between cinema companies and studios suggest that the exhibitors’ strategies post-pandemic are unlikely to be different from those before, and that cinemas will need to promote blockbusters to attract audiences. However, due to the absence of Hollywood blockbusters during the pandemic, the owners of UK cinema chains have also acknowledged that UK cinemas should not rely on the Hollywood studios because when Hollywood holds on to its blockbusters or shortens the theatrical windows, the cinemas will inevitably lack the content necessary to attract audiences. For instance, at the beginning of the first COVID lockdown, Tim Richards, founder and CEO of Vue Cinemas, claimed that,

Like everybody else globally, we were caught off guard when Bond moved last week, we are trying to keep our cinemas open for as long as we can. With Hollywood holding on to its movies, it has become increasingly difficult. (Macnab, 2020).

To solve such problems, one of the hypothetical solutions is to encourage multiplex screens to open up opportunities for independent films. Ben Roberts, the chief executive of the BFI, has incisively seen the shift in the cinema business and pointed out the possibility for multiplex to evolve. He commented on Twitter, saying that “[the shortening of windows] is a big news and should be an opportunity for independent films.” (Aftab, 2021). *Cineuropa* (Aftab, 2021) further explained, “this view is likely because cinemas might be reluctant to keep blockbusters on their screens when alternative platforms are available, thus creating a window for independent films to fill screens.”

Phil Clapp (2022d) holds a similar opinion and states that “we want to give the BFI reassurance that if they are minded to financially support British

independent films, then UK cinemas are now much more likely to screen them than before COVID.” In addition, the Independent Cinema Office’s (ICO) latest survey (2021) noted “there seems to be a trend of cinemas showing more independently released films, of working more closely and supportively with independent distributors on terms and to develop their online programming offer.”

However, whether independent films can make profits in multiplexes is debatable. As Mark Cosgrove (2022b), the cinema curator of Watershed, had some doubts about Clapp’s suggestion, noting that “it never worked successfully ... it is about the environment and the care of product, [multiplex] is a very marketing-heavy, bar-heavy place, and it is very challenging for the independent [films] to punch through.”

Despite Cosgrove’s argument, there have been a few exceptions where independent films have been allowed to perform effectively at multiplexes. For instance, right before the outbreak of COVID, Bong Joon Ho’s Oscar-winning drama *Parasite*, distributed by Curzon, was only released in 136 cinemas in the UK at first. After winning four Oscar Academy Awards including best picture, saw the film “expand[ed] from 430 sites to 561 after taking £2.5m at the UK box office over the weekend.” (Rosser, 2020b). There is no doubt that the film was a special case, as it was the first non-English language film to win the top prize, but the wide release of *Parasite* nevertheless demonstrated two factors. First, that audiences’ interest is the main driver for cinemas’ screening. Second, only well-marketed and well-reviewed independent films will be granted the opportunity to succeed in multiplex cinemas.

In this context, it will still be difficult for independent films to compete with blockbusters in marketing and independent films producers may need to spend extra money on promoting films, unless the UK Cinema Association or the BFI are willing to support such activities. This would clearly require further communication between the industries and the institutions, and it might not be an easy solution for multiplexes to seek to use independent films as complements at this current time.

Distinct from the multiplex chains, independent cinemas in the UK face different challenges in the post-pandemic era. According to the ICO survey from September 2021, 47% of respondents were operating at a loss, unsure when they would be profitable again, and 24% had to make redundancies. Meanwhile, 45% of respondents stated that the reduced theatrical window had

impacted their programmes, and 34% of respondents struggled to acquire film content for their programmes. (ICO, 2021). While the grants enabled by the government's policy response have supported independent cinemas through the COVID-19 pandemic, it will largely be the responsibility of the independent cinemas themselves to make profits in the post-COVID age, as they received their final grants from the Culture Recovery Fund by March 2022. However, there are several factors that may affect the confidence of independent cinema owners.

Distinctive from the business model of cinema chains, it is worth noting that independent cinemas have often not only provided audiences with a different range of films, but have also been places for film-related events, talks and activities. While some independent exhibitors experimented with offering their online programmes when the cinemas were closed, there is little evidence that such online programmes would benefit the independent cinemas, and according to ICO (2021), "only 26% independent exhibitors considered to continue with their online offer when venues are open." As this suggests, the independent cinemas have heavily relied on the audiences and their admissions. As *Variety* (2021) pointed out that "audience confidence and increasing audiences are both venues' deepest concern and greatest priority over the next one to three years."

According to Mark Cosgrove (2022b), the cinema curator of Watershed, "the pandemic changed the relationship between home and the external world, it is gonna take a while to reset...audiences have got really used to subscription and to watching films at home, so it becomes a very competitive time for people's time and people's money". In particular, Cosgrove points out that in the UK, because of inflation and the pandemic, people currently have less money to spend on events and cinema-going, meaning it appears to be easier and cheaper to watch films at home. (Interviewed by the author, 2022b). Indeed, the audiences may find lack of the time or money to return to independent cinemas.

Meanwhile, the film market has become increasingly crowded after the pandemic because many films have been released simultaneously. The lack of marketing of independent films may result in the loss of targeted audiences, while the audiences may also find it difficult to choose what to watch in cinemas. As a result, it has become hard to predict which films will perform well in independent cinemas. In this respect, Cosgrove highlights the unexpect-

edly good performance of the Norwegian film *The worst person in the world*, which was screened in Watershed for 7 weeks since March, and was their top grossing film in the first four months of the year. He admitted that its success was a surprise and joked that the success of this film gave him hope that the independent cinemas could still generate income. (Interviewed by the author, 2022b).

Clearly, the independent cinemas had been struggling even before the pandemic and they are facing further uncertainties in the post-COVID age. Unlike the multiplexes, each independent cinema may have its own unique business model and film culture, thus it is difficult to conclude what the strategies of UK independent cinemas should be. On the one hand, the independent cinemas would certainly expect support from the ICO and the BFI in the immediate post-pandemic years; on the other hand, it would be instrumental for independent cinema owners to adapt to a “new normal” and to try to increase audiences by experimenting with attractive film programmes and providing social experiences.

To conclude, the pandemic has significantly challenged and in some ways reshaped the distribution and exhibition sectors, and a new picture is expected in the post-pandemic era. I would argue that the cinema business model has successfully adapted to various changes in history, thereby demonstrating the strength and flexibility of UK cinemas. As such, rather than destroying the cinemas in the UK, the pandemic has accelerated some inevitable changes in the industry. For instance, the theatrical window has been further shortened due to the impact of digital distribution and online streaming. Thus, we can see that the most significant change was that the owners of major UK cinema chains agreed to embrace more flexible theatrical windows so that they could obtain the premiere rights of blockbusters, as Hollywood blockbusters remain important to boost cinema admissions.

Apart from the changes to the theatrical windows, the pandemic has affected the industry in various other ways. The first thing is that the multiplexes acknowledged that they would no longer merely rely on Hollywood blockbusters, indicating that independent films may gain more opportunities in multiplexes. Second, although the streaming platforms will be able to release the studios’ blockbusters within a shorter time, the competition between different streamers will also become intense post-COVID, and the emerging streamers will compete for the film resources, as well as the audience’s time and

money. Third, while UK independent cinemas have survived the pandemic, it remains an open question whether independent cinemas will ever fully recover. It has become increasingly essential for independent exhibitors to attract an audience with in-person experiences and more creative programmes.

7.1.2 The production sector in the post-pandemic era

The achievements of the production sector in the post-pandemic era have been detailed in Chapter 6 about the effects of the policy response and the support provided. Due to the clear COVID-19 guidance and the support from the BFI-led Task Force, the UK became regarded as a safe location to film from a global perspective, meaning inward investment projects have contributed to a significant COVID bounce-back. However, the production sector is facing a dilemma in the post-pandemic era, as noted in chapter 6. On the one hand, the production sector has quickly recovered from the pandemic with the help of government support and global investments. On the other hand, the pandemic has resulted in a severe skill shortage.

The demand from US mainstream streaming platforms is the biggest reason for the growth of UK productions since 2021, and the growth of streamers and their demand for content have contributed to the increased opportunities in the production sector. As *Deadline* (2022) noted,

The majority of the HETV spend (£3.4BN) came from international spend or co-productions. The rapid growth was also helped by a sharp increase in single long-form productions made for the streamers, such as Netflix's *Pinocchio* and *Matilda*, which count towards HETV rather than film. These high-end shows contributed £740M to the overall £4.1BN spend.

Meanwhile, the film production sector has experienced a slower growth but has also largely benefited from the US inward investments. As *Deadline* (2022) demonstrated,

Film rose by a steadier 13% to £1.5BN following a difficult 2020...The majority of the spend (82%) went towards international movies and, while investment rose by 46% on domestic UK indies, this still represents a small amount of the overall pie, reflecting a trend that has been taking place for some years.

However, these circumstances are proving controversial. In the near term, inward investment projects will be attracted to the post-COVID UK by the safe filming locations, talent, skilled film crews and tax relief policy. As a result, the production boom will contribute to the UK economy and increase employment opportunities. However, in the long run, it may hardly benefit the UK's national cinema.

As a consequence of the production boom, there is a severe skills shortage that poses a threat to screen production in the post-COVID-19 era. The skills shortage is not a solitary problem that resulted from the pandemic, but an ongoing economic and socio-cultural issue which has had a huge impact on the screen industry. From a socio-cultural perspective, the skills shortage is caused by the changes to employment opportunities. As around half of the people working in film and TV in the UK are self-employed ([ScreenSkills, 2022a](#)),

The skills shortage can also be explained by economic principles. As Sue Richardson ([2007](#)) explained,

In a market economy... when firms have buyers waiting, but cannot produce enough to satisfy the demand because they cannot recruit sufficient skilled workers, they interpret this as a failure of the skills development system. ([p.11](#)).

Seamus McGuinness et al. ([2018](#)) see the situation in precisely these terms,

Skill shortages relate to a situation whereby employers are unable to fill key vacant posts due to a lack of suitably qualified candidates.

From the perspective of policy, skill gaps may harm productivity due to lower output per worker, which also tends to inflate average labour costs. ([p.986](#)).

Examined from an economic perspective, the skills shortage in the screen industry could be interpreted in the following ways: first, the production companies failed to recruit enough crews to meet the production schedules. Second, the skill gaps of the skill workers have affected the productivity of productions. The third interpretation is that producers have tried to expand too quickly, taking on extra work that the workforce is not actually in a position to deliver.

In this context, the production sector post-pandemic faces not only an inability to recruit sufficient skilled workers, but also the unsolved skills gap along with the producers undertaking more production projects than they

could. As a result of the shortages, not only will production budgets increase due to the inflation of labour costs, but also productions are likely to be delayed because suitably skilled workers can't be found.

As I have noted in Chapter 6, independent film sector have faced severe challenges in the post-pandemic era, and the skill shortages in the production sector may result in even more devastating consequences for it. Once competition for skilled crews has increased, the resulting wage inflation has led to the rising of independent production budgets. Therefore, unlike the booming production sector in general, UK independent film producers have been rather struggling. According to *Screendaily's* (2022) report, "the market share of UK-qualifying independent films fell to 5% in 2021 from 14% in 2020, with the box office total down 11% year-on-year to £30m."

As Brexit and the pandemic cannot be undone, it is unlikely that enough skilled crews will be recruited in the short term, especially at costs that independent productions can afford. This suggests the need for two temporary solutions for the present moment. The first is to bridge the skills gap, and in this respect workforce training provided by employers could be essential and necessary. For example, Screenskills (2021) suggested, "Remote learning was highly popular among the majority of employers: from e-learning to platforms such as LinkedIn Learning, they appreciated the accessibility of remote learning. However, a more blended approach was the preference for the future."

Second, the industry is advised to do more to diversify its recruitment procedures and open up to people from all backgrounds. *Screendaily* (2021b) quoted from Neil Peplow, director of industry and international affairs at the BFI, who stated that "there is a genuine opportunity to now open up the industry". As the BFI Diversity Standard approach has been a strong policy support to the industry, "Peplow sees the chance to create a fully diverse workforce in UK film and TV, which historically has been regarded as a closed shop." (Macnab, 2021b). The statement also suggested that people may not be required to obtain film and TV education backgrounds to work on set or in the industry. For instance, "there has also been a concerted effort to pull in accountants, electricians and anyone else with transferable skills into film and TV production. Kitchen staff whose restaurants closed during the pandemic lockdowns have retrained as film technicians; event co-ordinators and sound engineers from the music world have been drafted in, as have security staff." (Macnab, 2021b). However, this will require employers or ScreenSkills

to develop new training and hiring system in order to effectively recruit or retain appropriate crews for the industry.

In the long term, as well as continuously promoting a more diverse and inclusive industry, the professional support of the public sector is important to attract talent and new workers to the industry and to build a bridge between the industry and education. The BFI's Future Film Skills Programme was designed to help young people to enter the film industry, 'the strategy aimed to support 25,000 people by 2022 – 10,000 already in the industry and 15,000 trying to get in.' ([ScreenSkills, 2021](#)). The on-going Future Film Skills Programme could be a way to help young talent find jobs in the industry in the future.

In the near future after COVID-19, the UK production sector will likely continue to grow and the skills shortage may then create even greater challenges. As [ScreenSkills \(2022b\)](#) predicted, "Film and high-end television production in the UK could be worth £7.66 billion – up from £5.64 billion – by 2025 and require nearly 21,000 more crew under the newly published detailed analysis." It is therefore essential that the issue of the skills shortages in the screen industry is taken into account as a short-term and long-term challenge.

To conclude this discussion of the production sector in the post-pandemic period, increasing inward investment has contributed to a production boom after the pandemic and the flourishing production sector will benefit the UK economy to some extent, without a concurrent increase in the number of skilled crews available, inflated labour costs will inevitably lead to the rising production budgets within a short time. Those high production budgets will make British production companies less competitive and Hollywood's investment may gradually withdraw from the UK. Thus, it would be rather short-sighted to keep encouraging the inward investment. Instead, in order to maintain the sustainability of the production sector, it will either be necessary to reduce the inward investment projects produced in the UK, or to increase the job opportunities for people from more diverse educational and working backgrounds. The screen industry and the government will also be expected to come up with new strategies and policymaking, and I shall further discuss this aspect in the next section.

7.2 The beginning of *Screen Culture 2033*

The BFI launched *Screen Culture 2033* in September 2022. As a new 10-year vision for UK screen culture and industry in the post-pandemic and post-Brexit era, this strategy is crucial to guide the industry into the next decade. Meanwhile, as noted in previous chapters, the film industry is facing several challenges at the beginning of the BFI's newly launched 10-year strategy. The increasing inward investment threatens the independent sector and to some extent caused a shortage of skilled crews, and the pandemic has certainly exacerbated the situation. The promotion of the diversity and inclusion in industry is clearly an on-going task for the BFI, one that is not only significant to the socio-cultural development of the screen industry, but also has some potential to alleviate the skills shortages. The BFI's *Screen Culture 2033* thus is expected to respond to these challenges, and this section also focuses on examining the BFI's priorities in the next 10 years, including its lottery allocation between 2023 and 2026, according to the current published documents and interviews.

It is important to note that the title of *Screen Culture 2033* has highlighted 'screen' and 'culture'. While the theme of *BFI2022* was still "supporting the future of UK film", *Screen Culture 2033* clearly has delineated a broader remit, referring to the screen industry, instead of the film industry. The emphasis on 'culture' also demonstrates that this new strategy focuses on screen culture rather than simply the screen industry. According to Ben Roberts (2022), Chief Executive of the BFI, "screen culture encompasses film, TV, digital media and video sharing, extended reality (XR) and video games. It has become the dominant means of communication and information for Gen Z and beyond, and a powerful means of expression, knowledge sharing and international soft power." Roberts (2022b) also admitted that "We quite deliberately use the words screen culture". He further explained that

Screen culture is not really valued publicly by stakeholders, educators and parents in the same way as other areas in the arts and culture sector are. And yet we all know screens are the universal cultural space, we're all engaging with them every day, and there's massive benefits and gains to be had. (Pulver, 2022b).

Roberts thus sees the great potential of screen culture and values its possible impacts on education and the public's lifestyle. Furthermore, the BFI

foresees the further evolution of new technologies, and expects the boundaries between different forms of media to become further blurred. As the BFI (2022g) notes,

Screen culture is evolving rapidly with the growth of video games, the use of social media, XR and other interactive media...This will only accelerate over the next decade as the ways in which society creates and consumes traditional and new media converge. Predicted technology-enabled evolution such as the metaverse and decentralised web offer huge potential for the sector.

By recognising a whole new array of screens and technologies, the BFI is showing its determination to embrace a wider screen culture in the next decade.

In addition to the BFI's ambitious 10-year plan, which "sets out the BFI's plans as a cultural organisation and a charity" (BFI, 2022h), the BFI also launched its first 3-year National Lottery Strategy from 2023 to 2026. As Tim Richards, the current Chair of the BFI, and Ben Roberts (2022h) declared,

Taken together, Screen Culture 2033 and the BFI National Lottery Strategy and Funding Plan will set out how we will deliver on our vision to transform access to supported programmes, screen culture, and jobs across the whole of the UK over the next 10 years.

It is particularly worth noting that this declaration stresses the idea of 'transforming access'. Roberts (2022b) argues, "It's all about transforming access. Transforming access to our programmes, to film industry jobs across the UK, and to screen culture more broadly." He further explained that it included the what he called "pure economics" of filmmaking, as "When we [BFI] published our Skills Review [2022], one of the headlines was really just the sheer number of jobs that you could take working in the industry, everything from working in accounting, to construction, to being a greens person." Then there is also what he called the question of "community cohesion", meaning "screens are a form of entertainment, combatting loneliness, supporting wellbeing, [and ensuring] information delivery." (Pulver, 2022b).

In this context, 'transforming access' shows the BFI's intention to transform the public's understanding of the screen industry and screen culture. Rather than defining the screen industry as a field of expertise, the BFI promotes screen culture as a form of entertainment and encourages a diverse and

inclusive workforce to participate in the industry. It is worth noting that this approach is distinctive from the first film legislation in 1909, which I have discussed in Chapter 3. As the 1909 Act regulated who could exhibit films, it indicated that the film industry was expected to be exclusive for professionals. In contrast, the BFI's new vision regards the screen industry as an inclusive industry that encourages participation of people from diverse backgrounds.

Roberts's statement also demonstrates that while *Screen Culture 2033* has a great emphasis on 'culture', it indeed has both economic and socio-cultural purposes. Whether and how the BFI plans to fulfil its goals shall be discussed in the following sections, I also examine the six key ambitions that are underpinned in *Screen Culture 2033*: "diversifying the BFI audience; embracing a wider screen culture; reframing the public's relationship with the nation's screen heritage; growing the BFI's digital platforms; developing long-term strategies for education and skills; and growing the cultural and economic impact of the UK's screen industries." (BFI, 2022f). In the context of the BFI's ambitions, we shall also ask whether the challenges faced by the current film industry might be solved by these new technology-led developments that emerge from the current digital era.

7.2.1 BFI+ and its digital-first approach

As one of the BFI's six key ambitions, BFI's long-term "digital first" approach culminates in the creation of a tiered BFI membership that will include Sight & Sound, BFI Southbank, BFI IMAX and BFI+. Among these, the BFI+ is an innovative streaming service that the BFI is still seeking for a significant one-time investment. To some extent, it is an upgrade for the existing BFI Player, which has been the BFI's video on-demand streaming service, showing critically acclaimed classic, cult and archive films. Ben Roberts highlights the distinctiveness of the BFI+, noting that, "Player to '+' is less about a linear streaming service, and more about how you can access more of the BFI in multiple ways." (Tabbara, 2022a). According to *The Guardian's* (Pulver, 2022b) report, Roberts also talks of "creating a digital universe that is more than just watching films", adding what he calls "nonlinear content", such as BFI-generated journalism, live events or educational material, to enhance the experience."

Based on these concepts, I explore the new digital approach of the BFI in this section, in doing so, arguing that the BFI's digital-first strategy is not

only “a key to this cultural imperative” ([Screen International, 2022](#)), but also, it is an economic approach to generate more income for the BFI.

As a cultural imperative, the BFI+ aims to make more of the BFI’s cultural services easily accessible to users and to the public in general. *The Guardian* praised BFI’s emphasis on creating a more accessible cultural experience through BFI+, reporting that “the next generation streaming service is to furnish access to world-class learning materials for use in schools, and to make the BFI National Archive collection more accessible to the public via digitisation.” ([Pulver, 2022a](#)). The promotion of a wider access use of cultural services also contributes to the BFI’s diversity and inclusion approach, as it provides audiences with diverse and inclusive content. This measure also implies the BFI’s plan to fill the gap of skills shortages by offering access to anyone interested in screen culture.

Meanwhile, BFI+ is expected to become a commercial service. One of the reasons for this is that the BFI is in significant need of income growth generation, as it will receive less National Lottery funding in the next three years. This constraint is noted in the *BFI National Lottery Strategy*,

This strategy comes at a moment when cultural, economic and societal factors are having a seismic impact on the screen sector, independent film, and screen culture as a whole... As we head into this period, our available BFI National Lottery funding will be approximately £45m a year, which is 10% lower than during our previous strategy, *BFI2022*. ([BFI, 2022h](#)).

The reduction of the available lottery funding has inevitably affected the BFI’s strategy, as it requires the Board to generate its own income apart from the lottery funding. Roberts ([2022f](#)) stresses that

We receive 2.7% of the National Lottery’s income, but the size of the overall National Lottery pot has fallen and we have to do more with less...To deliver on our vision from a place of stability, we’ll need to grow the income that we generate ourselves. We must also consider how the industry can better support our cultural work and the services we provide to the screen sector.

Therefore, Roberts proposed to increase the BFI’s self-generated income as a cinema and a streamer, and the Board is intending to do this in part by improving the digital access and enhancing digital revenues. To some extent,

while the BFI has been running the BFI IMAX successfully since 1999 and upgraded it in 2022, the closure of cinemas during the pandemic and the Hollywood studios' changing distribution models inevitably threatened the sustainability of mainstream cinemas, such as the IMAX. Increasing the digital revenues therefore became a necessary option, rather than an alternative one. In this respect, the BFI plans to establish BFI+ as a commercial film hub that provides content for audiences, filmmakers and educators, with subscription to or membership of BFI+ expected to bring the Board more income that will be used to invest in UK independent film productions.

However, there are challenges and risks to reckon under the BFI's ambitious plan. First, the BFI needs a big investment to get its streaming service up and running. Second, it will then be relying on audience subscription or membership to make BFI+ profitable. Third, the BFI will inevitably participate in the so called streaming wars, whether the BFI+ will be commercially competitive remains unknown. On the one hand, Roberts admits that "it won't be something we can fund from our existing envelope" ([Screen International, 2022](#)). On the other hand, he is confident that the service will have long-term economic and socio-cultural impacts. Roberts (2022) claims that "we can be an investor in film and we have got really significant platform for audiences, so I definitely want us to be acquisitive, because I think that will help independent film, and the majority of our acquisition is British independent films." In this context, becoming an investor for independent films represents the BFI+'s economic impacts, while reaching diverse audiences and supporting the independent sector shows what the BFI+ is aiming for in terms of socio-cultural impact.

As an innovative proposal in *Screen Culture 2033*, we can conclude that there are three key aspects of BFI's digital approach at the current stage: first, that the development of BFI+ is designed as a digital hub for accessing a wide range of content, the audiences with a membership will be able to access the BFI's streaming platforms, cinemas and educational materials. Not only it ensures the diverse and inclusive content to be available for audiences at different platforms, but also, the promotion of screen culture encourages those who appreciate it to gain skills and jobs in the screen industry across the UK.

Second, the BFI's long-term plan is to invest in productions as a means of raising income and supporting the independent film industry. Distinctive from using the lottery funding to subsidise film productions, the BFI+'s approach

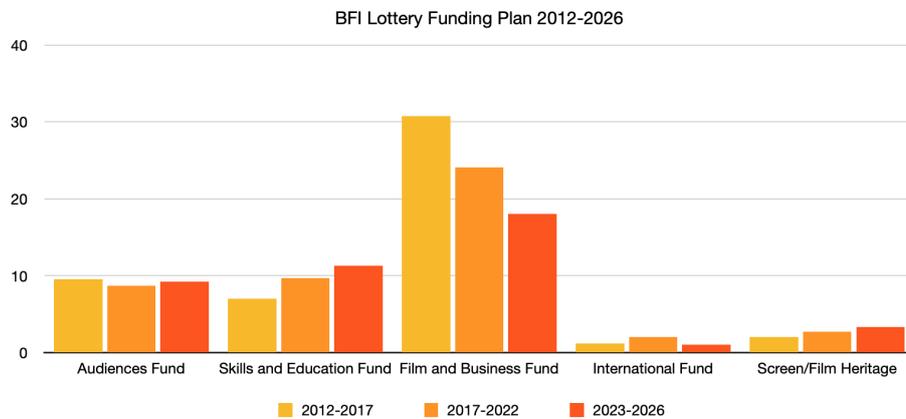
is to invest in productions that are evaluated as having potential to provide returns.

The third aspect of the BFI's digital approach therefore is to generate commercial income for the BFI by recouping investment, in doing so, the BFI will be able to survive as an organisation and plough back the additional income into future productions. The idea of BFI+ also indicates that the BFI, becoming the lead agency of the screen industry, is also seeking to become a cultural enterprise. While the BFI's goal is still to promote British screen culture, the ability to generate more income will certainly give it more flexibility to deliver its socio-cultural goals.

7.2.2 The BFI's Lottery Funding Strategy 2023-2026

From the discussion of the BFI's innovative digital approach, it is clear to see that the BFI is in need of more income, as there is a drop of approximately 10% from the previous funding package that was available when *BFI2022* was launched. Even so, the lottery funding is available to the BFI is reasonably substantial, and in this section I therefore examine the BFI's allocation of that lottery funding in the first 3 years, according to the currently available published documents. I shall analyse the changes of its allocation of the lottery funding compared to its previous strategy, and explore the the strategies that the BFI has prioritised between 2023 and 2026.

The chart below 7.2 compares the estimated lottery money spent every year according to the three five-year plans *Film Forever*, *BFI2022* and *Screen Culture 2033*. It is necessary to explain that the categories of BFI's support are slightly different in the BFI's strategic plans at different stages. For instance, *Film Forever* didn't set a specific fund for skills development, but had a combined Skills and Business Development fund, as part of its film and business fund. However, in *BFI2022* and *Screen Culture 2033*, skills and education are categorised separately as "further learning and skills". the BFI's income is more than simply the lottery funding that it is received. First, the lottery funding pot itself is made up of income from Lottery ticket sales, return on investments made in film productions and interest on funds on deposit and release of the BFI Lottery reserve, but also, the government's Grant in Aid (GIA) for BFI activities is confirmed annually. Thus, the real-term size of the BFI's spend could vary from its lottery funding plan, but here I only present the BFI's published data on the lottery funding plan. Meanwhile, inflation



Average Lottery Funding Spend per year (£m)	2012-2017	2017-2022	2023-2026
Audiences Fund	9.5	8.7	9.2
Skills and Education Fund	7	9.7	11.3
Film and Business Fund	30.7	24.1	18
International Fund	1.2	2	1.06
Screen/Film Heritage	2	2.7	3.3
Total	50.4	47.2	42.86

Source: BFI

Figure 7.2: BFI Lottery Funding Plan

and the weak pound may also affect the impact of the BFI's lottery funding, but this is difficult to measure at the current stage.

There are several initial findings from the chart 7.2, first, the funding for audience development remains roughly the same across the three periods. Second, the fund for skills and education has increased significantly. Third, the fund for production and business has declined very sharply. While it is an optimistic sign that the BFI has devoted more fund to skills and education, it is rather shocking that the support for production has gone down to a such great extent. These shifts in the chart also demonstrate the BFI's strategic changes over the three periods, and the causes and impacts of these strategy shifts can be uncovered by examining the BFI's funds for audience, skills and film productions.

First, the audience has always been the key element of the BFI's strategies since 2010. The audience fund in previous lottery strategies focused on attracting diverse audiences in the regions and nations by developing film hubs, festivals and online programmes, *Screen Culture 2033* shows that £2.7m via

the new National Lottery funding strategy has been allocated for the new BFI National Lottery Open Cinemas scheme. The scheme is “a pilot aimed at boosting attendance for new audiences in independent cinemas and growing engagement with independent film. With the ambition of supporting a free, fully accessible screening every month in UK-wide independent cinemas”. (BFI, 2022h). In this respect, distinctive from the BFI’s previous strategy to attract audiences through various platforms, the Open Cinemas scheme has a clearer target, and as it aims to strengthen the connection between new audiences and independent cinemas, audiences will be invited to independent cinemas for free screenings. The BFI is thus trying to attract more new audiences and cultivate the audiences’ habits of cinema-going. Ben Luxford, BFI head of UK audiences, said “The screenings will be in as many cinemas as wish to participate and that we can afford to participate...[BFI National Lottery Open Cinemas] is aimed at new audiences. It is not about subsidising audiences that are already developed.” (Macnab, 2022).

Luxford also aims to engage with the BFI’s digital-first approach to go beyond cinema, highlighting that “Distributors looking to find audiences through streaming platforms are welcome to apply to the Audience Development Fund.” (Macnab, 2022). This is not an entirely new idea, however, as the Distribution Fund established a decade ago had already encouraged “new thinking in distribution and marketing, including innovative release models that harness emerging digital platforms; and the creative and audience-building opportunities offered by cross-media activity.” (BFI, 2012a). In this sense, the BFI’s audience fund has not significantly changed in its purposes, methods or the available money. However, the new lottery funding plan could particularly benefit independent cinemas and contribute to their sustainable development.

The second aspect of the lottery funding plan that I will discuss is the use of the Education and Skills fund. As observed, this fund is increased in the new lottery funding strategy, not only because skills development and education are increasingly valued by the BFI, but also because the skills shortage in the screen industry has resulted in certain negative impacts on productions. As noted in the previous section, the skills shortage will be devastating to the UK’s independent film industry if it is not addressed, and it became one of the greatest crises at the end of the *BFI2022* five-year plan. Under these circumstances, the *BFI Skills Review 2022*, the latest finding on workforce development in film and high-end TV production sector, urged the BFI

to “use National Lottery funding to enable private and public collaboration, with a focus on improving accessibility across the UK.” (BFI, 2022c). The BFI has followed this advice, and the support for education and skills covers various aspects, such as supporting teaching with film, providing careers advice, filmmaking activities for 11–16 year olds, opportunities for 16–25 year olds to work in the screen sector, establishing Skills Clusters to support local industry and helping underrepresented groups access training. (BFI, 2022h). Notably, the BFI aims to involve the next generation in school, indicating that the long-term strategy may take years to see results.

Alongside the BFI’s long-term investment in education, the BFI also took the Skill Review’s advice and negotiated an industry commitment of 1% of overall production spend towards UK-wide skills development. However, the measure is not mandatory at this stage, as Harriet Finney (2022a), director of corporate and industry affairs at the BFI, explained: “Voluntary is where we’re starting.” In addition, she noted that “There are lots of brilliant initiatives [within the industry] already being run, stating a task and finish group would be set up with the DCMS in October [2022] to further look at how to get the industry on board with the 1%.” (Tabbara, 2022a). According to *Screendaily*’s report (2022a),

Finney described the skills shortage as a “£100m problem” with the BFI able to use its position sitting between government and industry to look “creatively” at ways to address the issue, in the absence of National Lottery funding on its own being able to solve the overarching problem.

In this respect, the skills shortage is recognised as a critical problem to the screen industry, although there may not be a rapid solution at this stage, as it requires the effort of the BFI, the screen industry and government working together.

The third aspect of lottery funding I shall examine is the film and business fund, which faces a significant decline in the new lottery funding plan. But as the chart above demonstrates, the film and business fund also takes the largest portion by some way of the BFI’s lottery funding, with the fund for filmmakers including the BFI National Lottery Filmmaking Fund (£43.5m), the BFI National Lottery Creative Challenge Fund (£2.7m) and BFI NETWORK (£7.8m). Clearly, the amount of funding per year on film and business has fallen from £30.7m in 2012-2017, to only £18m in 2023-2026, and this will

inevitably affect the BFI's support to the independent film production sector. In this context, Roberts (2022) admitted that "When we embarked on the consultation around the strategy, there was a lot of anxiety from our traditional beneficiary community from independent film, filmmakers and producers, who were rightly worried we were diluting what is already a challenged place."

However, as the details of the BFI's funds and programmes are not going to be announced until early 2023, I will not be able to provide a detailed examination. On the one hand, the BFI may urge the Global Screen Fund to take further responsibilities to support the independent film industry, and the Global Screen Fund's £7m from the DCMS per year may become a complementary fund of the lottery fund. On the other hand, as Roberts notes, the BFI is planning to increase its own commercial income to help support independent production. As I noted above, establishing BFI+ will be a crucial means of doing this in the near future.

However, it is not only the BFI's responsibility to generate support for the independent film industry, and it is necessary to question what else the government and policymakers will do. Should the government raise the tax relief for independent filmmakers and should inward investors contribute to the sustainability of the UK screen industry? These are important questions for policymakers in the current environment. As Andy Paterson, who produced *The Railway Man*, argued,

So much money is being made by this country on the back of servicing American films and series and we must put some of it back to make sure that we have a future ...The reason that everybody comes here to shoot is because we have the cast, the crew and skills, but it's the independent sector where that talent is nurtured. (Alberge, 2022).

In this context, the BFI's *Screen Culture 2033* strategy can be seen as an ambitious plan from both economic and socio-cultural perspectives, as it redefines the BFI's role in the next decade. The BFI is not only expected to support UK film culture as a lead agency, but potentially also become an innovator and investor, promoting a "audio-visual storytelling and the digital revolution" (BFI, 2022f) in a changing society. Given that the BFI is in significant need of additional money to deliver its ambitious plan and there is less lottery funding to spend, the BFI urgently needs to seek investors for the one-time significant investment that is needed for BFI+ as soon as it can.

To conclude, it is time to answer whether the BFI's new measures are able to fulfil the six ambitions underpinned in *Screen Culture 2033*. The answer is rather positive, since the principle of 'transforming access' should enabled the public to embrace a wider screen culture and reframe their relationship with the nation's screen heritage. Economically, opening up to a wide access for a diverse and inclusive workforce should also contribute to a long-term solution for skills shortages. Moreover, the digital-first approach fulfils the ambition to grow the BFI's digital platforms. By achieving these ambitions, the *Screen Culture 2033* should also achieve its final goal of "growing the cultural and economic impact of the UK's screen industries." (BFI, 2022f). In this context, the key approach to achieving the BFI's goals is to establish BFI+, however, the reduced lottery funding from the government requires the BFI to seek another investor to engage with the BFI's ambitious plan.

In terms of the well-being of the UK film industry as a whole, the most challenging issue for the BFI at this stage is to develop the sustainability of the independent sector, and it may have three possible solutions to support the independent sector. First, the BFI needs to lobby the government to offer further tax incentives to independent filmmakers, which will make the production of independent films more profitable and therefore encourage more filmmaking. Second, the BFI, as well as the government, is expected to encourage streamers to contribute positively to the UK independent film sector, such as by providing more resources or economic support to talents and filmmakers in the regions and nations. Investment by the streamers would relieve some of the BFI's responsibilities and address the skills shortage in a long term. Third, the BFI will ideally become an investor, distributor and exhibitor if it succeeds in building the BFI+ ecosystem, as in this context, independent films of high quality may attract audiences and benefit the platform culturally and economically. Nevertheless, it will take a great effort to bring any of these possible measures to fruition, and will also require collaboration between the BFI, industry and the government more than ever before.

7.3 Conclusion

This chapter has looked at the current situation of the film industry in the post-Brexit and post-pandemic era and the BFI's new strategy for the next 10 years. There is no denying that both Brexit and the pandemic have reshaped

the screen industry, and while the UK experienced a production boom in 2022, the film industry is facing a series of challenges relating to theatrical windows, skills shortages, production costs and audiences. Not only do exhibitors have stronger competition for audiences and content, due to the increasing strength of the streamers, but also the production sector is concerned about financial insecurity now the government's COVID support has ended, and independent film productions may become even less competitive without those subsidies.

In this context, the independent sector is faced with a dilemma: on the one hand, rising production costs and the lack of skilled workers has forced independent producers to delay or abandon their projects; on the other hand, the independent sector may experience unprecedented opportunities, given that the shortened theatrical windows of blockbusters on a global scale could lead to more opportunities for UK produced films in domestic and international markets.

In this context, the BFI's new strategy *Screen Culture 2033* makes a great effort to support the independent film sector with innovative distribution or exhibition models. The development of BFI+ and the digital-first approach will see the BFI adopt the vertical integration system, running as a cultural enterprise, as it aims to invest, distribute and exhibit its own films. Under these circumstances, whether BFI+ could be profitable and how the BFI will balance its socio-cultural role and economic role may need further examination in the future.

In the meantime, many argue that the government needs to support the independent sector with a new tax relief policy and help the industry reach certain agreements with American streamers. At the same time, inward investors benefiting from tax incentives from the UK government should be obliged to invest in the socio-cultural development of UK screen industry, in areas such as education, training and diversity and inclusion. In doing so, the screen industry would maintain the benefits from the production boom in the post-pandemic era, as well as achieve healthy and sustainable development in the near future.

Chapter 8

Conclusion

This thesis began with Alan Parker’s speech about building a sustainable UK film industry and him questioning what film policymaking and government measures could contribute to the sustainability and strength of the industry, which the UK aims to create in order to fulfil its creative and industrial potential? (Parker, 2002). At the end of the thesis, it might be the time to answer Parker’s question, based on the review of policymaking in the past and in the present that my thesis has presented.

8.1 The Past

As Haddon et al. remark, “Good policymaking requires a wide range of evidence: statistics, social studies, modelling and economics. History often seems to be absent from this list. Ministers and officials regularly invoke the phrase ‘learning the lessons from history’ without appreciating what it actually means.” (Haddon, Devanny, Forsdick, & Thompson, 2015).

Looking back to the film industry and film policies at the earliest stage, it can be seen that the government intervened in the development of the UK film industry from a very early stage. In the 1900s, the government’s film legislation was intended to regulate the film venues in relation to safety issues. Some may argue that the first film legislation failed to achieve its goal, as the fires in cinemas only sharply decreased after the wide use of inflammable film in the 1950s. However, lessons could be learned from the first effort of policymaking about the fact film is not only an entertainment for the public, but also a complex industry which involves production, distribution and exhibition sectors, as well as a form of cultural representation. In this context, a small change could affect the situation as a whole, and as a result, the 1909

film Act contributed to the first wave of investment in purpose-built cinemas and led to the establishment of the BBFC a few years later.

In the subsequent decades, from the 1910s to the present, film policymaking was divided into two approaches: economic policy and socio-cultural policy. The economic policies often focused on preventing Hollywood's domination in the UK film market. For instance, the Cinematograph Act 1927 applied a quota to distributors and exhibitors, aiming to regulate the number of British films on screen. This policy aligns with John Hill's periodisation of this stage as 'protectionist'. However, the Quota Act failed to promote the production of profitable high-quality British films, rather, the American companies managed to maintain their advantages by investing in cheap UK-produced films to meet the Act's requirement. The introduction of the Eady Levy and the establishment of the NFFC in the 1950s ushered in interventionist policies in support of film production and related activities. Under this approach, the UK government aimed to support film production by providing directed loans through the NFFC and taxing box-office receipts through the Eady Levy. Unexpectedly, the tax incentives encouraged a lot of American and European runaway productions in the UK, meaning that international companies moved their film productions to the UK due to the lower cost. The impact of these 'protectionist' and 'interventionist' measures illustrates the complexities and sometimes unintended consequences of film policies in the UK. Although the intention of the Quota Act and the Eady Levy was not to attract international capital, this legislation did indeed result in inward investment in the UK. In this sense, the government was not very effective in using economic measures to restrict the number of Hollywood films in cinemas or productions that had made profits in the UK. However, the historical economic policies also made the UK and American film industries inextricably intertwined, furthermore, they contributed to the development of transnational cinema and enabled early international co-productions.

In the 1990s, the UK government underwent a notable shift in its attitude towards Hollywood and adopted a more market-friendly approach. This change in perspective led to the introduction of the tax relief policy. To some extent, the tax relief policy retained the unintentional result of the Eady Levy, as it aimed to attract inward investment and encourage international film productions in the UK. Meanwhile, the tax incentives could also be applied to domestic productions. From this stage, the government gave up on the idea

of exploiting Hollywood's profits to subsidise the indigenous productions; instead, lottery money was used to support the indigenous and independent film productions. In this respect, the tax relief and lottery funding aimed for different objectives: while the tax incentives were explicitly designed to encourage investment in the film industry, the lottery funding was responsible for supporting high-quality indigenous productions. It thus served as an interventionist policy aimed at providing selective funding for production activities, with the intention of achieving specific socio-cultural objectives. Although the lottery funding ensures the indigenous productions remain independent from Hollywood's interventions, the discrepancy in the amount of funding made available through these mechanisms is noteworthy, as far more money goes to Hollywood-led inward investment productions than to UK independent productions.

In the 2000s, along with the establishment of the UKFC, the Labour government also officially launched the new strategy of promoting the UK creative economy, and industries which have their origin in creativity or cultural activities were encouraged to contribute to the growth of the economy. According to data made available by the DCMS and the BFI, the film industry has played an essential role in boosting the creative economy since then.

In the UKFC's decade-long existence, it made two significant innovations that have helped to shape today's industry. First, it was in charge of disbursing National Lottery money and set up various film funds to support British filmmakers. Through these film funds, the UKFC not only invested in the independent films, some of which were commercially successful and have achieved success at the Academy Awards, but also used the funds to encourage diversity and inclusion in the industry.

Second, the UKFC worked with the DCMS to set up the Cultural Test in 2007, which has not only been an enabler to assess films that intend to achieve the tax relief, but has also redefined 'British film'. In the Cultural Test's scoring system, British films are not necessarily invested in solely by British companies, or produced in the UK by British filmmakers, rather, Hollywood blockbusters can qualify as British, once they meet the standards of the Cultural Test by filming in the UK, recruiting British skilled workers or having British post-productions companies. As Alan Parker (2002) stressed that "We have to not worry about the nationality of money." Therefore, the Cultural Test and tax relief policy's purpose is to attract international invest-

ment by providing tax incentives and branding the nation as a creative hub, and in doing so, the policies are expected to benefit various industries that can contribute to the economy. However, the other side of the Cultural Test and tax relief is that these schemes did little to strengthen a culturally British independent cinema.

In this historical context, the government's film economic policymaking has evolved from the single-purpose economic intervention that aimed to protect the film industry from Hollywood's domination, to a combination of economic and socio-cultural measures that support the film industry as part of the creative industries.

Distinct from the economic policymaking, the changes in socio-cultural policymaking since the 1910s have been less drastic, and to some extent, this thesis also has focused less on the historical socio-cultural film policies. As the name of the BBFC has changed from the British Board of Film Censorship to the British Board of Film Classification, the BBFC's policies also changed over time, due to wider social and political changes. As a moral gatekeeper, the BBFC was initially established to protect the film industry from interventions of local authorities. As a result, while the BBFC has been regarded as a censor and banned films due to political pressure or moral panic, it managed to keep an arm's length from the government and prevented direct interventions from the authorities at the early age. In recent years, the government has become a less significant influence on the BBFC's decision-making, with the public and audiences taking over the government's role and playing the major part in shaping any restrictions on content.

Looking back at the past, at the historical development of film policymaking, can be seen as a form of contextual analysis and an unpacking of institutional memory. From a broader perspective, it provides "a longer view that changes how we think and allows us to challenge narratives and promote different ways of thinking." (Haddon et al., 2015). Two of the key issues that emerges from this historical investigation are that film policymaking has shaped the film industry, but also that the nature of the government, the development of the industry and the public's perceptions of cinema have also influenced the development of film policy.

8.2 The Present

In the contemporary era, as the film industry is facing more complex situations, the accelerated changes in the medium, the geo-political situation and the film industry clearly require more accurate judgement and faster responses from the policymakers.

As the BFI became the lead strategic body of the film industry, taking on both economic and socio-cultural responsibilities from 2010, the BFI's regularly published strategic plans also became increasingly important in guiding the industry. In terms of the BFI's role, it has mostly inherited the UKFC's responsibilities to support the independent film sector with lottery funding, as well as to qualify films and TV under the Cultural Test for tax relief. In addition to this, the BFI is also expected to help UK films achieve a global cultural reach and economic growth through its international strategies.

Before evaluating the government's and BFI's policymaking at present, it is necessary to ask what kind of film industry we have now. Parker identified four strengths of the UK film industry two decades ago, which were its "outstanding creative skills, outstanding studios and facilities companies, the finest technicians and craftspeople anywhere and the English language." (Parker, 2002). Indeed, these strengths are still the industry's advantages today, and they have made the UK a creative hub that attracts inward investment.

Moreover, I would argue that there is a fifth strength: a well-established policymaking system. This system was particularly tested during the outbreak of the COVID-19 pandemic, and it was evident that the government responded quickly to the pandemic, coordinating with the BFI and providing the industry with economic subsidies and health and safety guidelines. These measures successfully helped the screen industry bounce back quickly from the devastating impacts of the pandemic, and the UK was thus regarded as the safest place to film, resulting in the relocation of many Hollywood film and high-end TV productions. Due to the highly operational policymaking system, inward investment surprisingly increased in the post-pandemic era and film and TV productions in the UK were greatly boosted.

The BFI and government response towards pandemic and the results of this reflect three factors: first, the screen industry has been increasingly valued by successive governments as part of the creative industries, evidenced by the launching of the £500 million Film and TV Production Restart Scheme during the pandemic to support the production sector. As this scheme covered

the COVID insurance for insurance companies, it was crucial in encouraging the producers to restart their projects again. Second, the government, the BFI and the industry have maintained a good working relationship, and this relationship ensured that collaborative work could be done productively between different departments during this critical time. Third, the recognition that immediate, strategic and evidence-based policymaking is essential for today's film industry, the positive outcomes post-COVID proving the value of such work.

By achieving the fifth strength, the BFI and the government have managed to guide the industry through several crises, such as the COVID-19 pandemic, as well as Brexit. Brexit clearly has affected the cultural exchange between the UK film industry and European industries, with the withdrawal of the UK from the Creative Europe scheme also leading to the loss of funding for UK independent film productions. In these circumstances, the Global Screen Fund, financed by the DCMS, was launched to support the international development of the UK's independent screen sector. Although its impacts can hardly compete with Creative Europe, the Global Screen Fund has made a great effort to rebuild the support system for the independent sector, in order to boost the international competitiveness of the UK screen industry.

Despite the advantages and strengths of the UK film industry, we cannot ignore the severe challenges the film industry is facing. On the one hand, by becoming a creative hub with an effective government support system, the UK has attracted inward investment that benefits the creative economy. On the other hand, the escalation of production budgets, the shortage of skilled workers and the shortened theatrical windows are three emerging challenges threatening the sustainable development of the UK film industry.

One could argue that these problems are due to external circumstances, and indeed, Brexit and the pandemic have weakened the industry to some extent. For instance, Brexit and the pandemic forced some skilled workers to leave the country and the industry, on top of which, the relocation of productions to the UK led to the current shortage of resources and the rise of labour costs. Meanwhile, as the theatrical windows of the Hollywood blockbusters are shortened post-COVID, UK cinemas have a lack of content to attract audiences. This is then a clear threat to the well-being of the theatrical exhibition sector.

However, while external factors may have accelerated the exposure of these

problems, the over-reliance on inward investment and the current government's policymaking focus have been the main causes of the industry's dilemma. For example, the Cultural Test and tax relief policy have overly focused on rewarding the inward investment that generates economic value in each project. In this respect, the inward investors are not obliged to take responsibilities for nurturing the creative hub, and while the inward investment projects have contributed to the UK economy, they have failed to promote the UK national cinema as an attractive brand or support a diverse workforce that reflects British society.

In consequence, the independent film production sector may become the biggest victim of the current circumstances. While the amount of lottery funding available for film production will be further reduced from 2033, given the lack of skilled crews and rising production costs, independent producers are barely able to start films and are less likely than ever to make any profits. The inevitable decrease in independent films will not only result in a less diverse film culture in UK cinemas, but also affect the total revenues outside the UK and the nation's soft power on the global stage. Without sustainability, inward investment will surely eventually drift away from the UK, if the production cost remains high and the creative hub's supply falls short. In this sense, how to use policy as a tool to support the film industry as a long-term strategy will be the prime task for the government and the BFI in the immediate future.

8.3 The Future

So, what will the film industry look like in the next decade? And what kind of government measures are required to ensure that this new version of the film industry is sustainable?

The BFI's next 10-year strategy, published in the autumn of 2022, pictured a new vision of screen industry that was very different from what the first film legislation had aimed for. While the 1909 Act established the standards for film exhibitors and urged the film industry to be exclusive for a small amount of people, the screen industry in the next decade is expected to become much more inclusive. Not only a variety of screen content will be made more accessible for the public, but also, people with diverse backgrounds are encouraged to work in the industry. The vision of an inclusive screen industry can be seen as the BFI's commitment to promote diversity and inclusion in the industry,

as well as its long-term strategy to alleviate the skills shortages.

Meanwhile, as the independent film sector is on a downward trend, certain government interventions are clearly needed. Independent filmmakers have been calling for many years for improved tax incentives for their sector, and *An Economic Review of UK Independent Film*, commissioned by the BFI, also suggested that:

A significant increase in the scale of Film Tax Relief (FTR) is likely to be the most powerful lever available to generate an increase in small and/or independent film-making in the UK ... we expect that adding 20% to FTR for films within a relatively low budget range would have a low Exchequer cost compared to the total cost of FTR. ([Alma economics, 2022](#)).

In the last amendment of the tax relief policy in 2013, the tax relief became available at a rate of 25% up to the first £20 million of each production's qualifying core expenditure, and 20% thereafter. A decade later, due to the increasing production costs and the inflation, it would appear sensible to apply a higher tax relief rate on an increased core expenditure. As such, how to define 'a relatively low budget range' and what size of tax relief increase is necessary should be further examined with detailed feasibility studies.

While offering a tax relief boost to independent productions seems to be an effective solution, one of the lessons of film history is that protectionism does not benefit the film industry in the long term. Moreover, the cost reduction does not guarantee profitability, which thus begs the question of how to support the independent sector to make profits?

First, embracing the global film markets may contribute to a wider cultural reach and economic benefits, and this requires the promotion of international distribution and international co-productions. In this regard, the newly-established Global Screen Fund is designed to boost the promotional opportunities for the UK's independent screen sector internationally. It has especially focused on international distribution, international business development and co-productions, and as such, the GSF is expected to support the industry with a wider global distribution and seeking emerging co-production partners with potential.

Second, the video-on-demand streaming platforms have created a new landscape that contributes to the largest demand for film and TV ever. Online distribution may help UK productions reach larger, more diverse audiences

and make profits in a shorter period. Meanwhile, the BFI's latest strategy to set up BFI+, a subscription streaming service, also aims to provide a platform to showcase UK film culture and stream independent films, including the BFI-funded ones.

Apart from the potential changes to the tax relief policy, the Cultural Test should also be reexamined so that it can provide better support to socio-cultural development of the screen industry. Since its last revision in 2014, some of the Cultural Test's focuses are no longer in line with the BFI's. For instance, the BFI Diversity Standards pioneered the promotion of diversity and inclusion in UK film productions, however, the Standards have not been applied to inward investment projects. In this respect, the inward investment films and TV are not obliged to follow the BFI's diversity policy, meaning that diversity and inclusion in the UK film workforce cannot be radically improved. While the BFI has been trying to lobby the Hollywood studios to reach an agreement to adopt the BFI's diversity policy in their productions in the UK, it may be more effective to reward such actions with the potential tax relief. That would require the BFI to lobby government to recognise the value of a more diverse and inclusive film industry.

In addition to encouraging diversity and inclusion, it is also advisable that certain points in the Cultural Test are awarded to reward investors who support the skills development in the UK nations and regions. In doing so, Hollywood and the giant streamers might be expected to partner with the BFI and the government in the socio-cultural development of the screen industry, as a long-term investment.

Finally, we must conclude that in the near future, the key ingredients of establishing a successful and sustainable UK film industry, with the help of policymaking, are: an irreplaceable creative hub, a globally-focused, distribution-led independent sector, and a flexible tax relief policy that attracts inward investment for economic growth, as well as for socio-cultural development.

To achieve these goals, the BFI, the government and the industry will need to work together to nurture the five strengths that characterise the film industry. Furthermore, innovative measures and the revisions of film policies are advised in order to adapt to the new era and the evolving industry. As such, the evidence-based industry surveys and the lessons from the historic policies are two cornerstones of the government and the BFI's policymaking, as film policy in the present has been shaped by the past and will shape the

industry in the future.

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