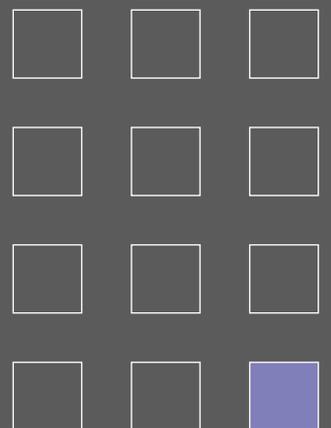
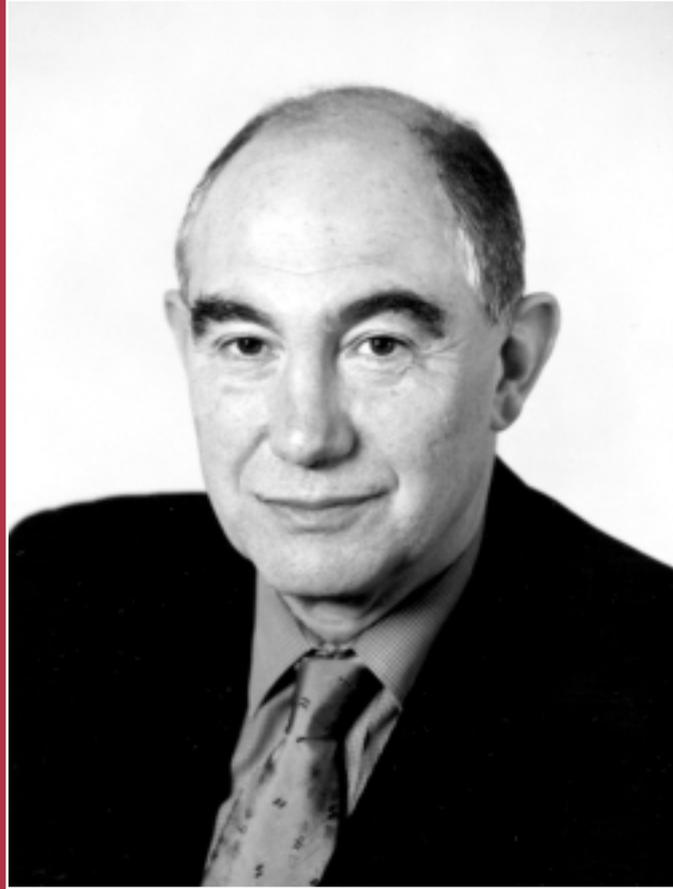


**SKILLS FOR
TOMORROW'S MEDIA**

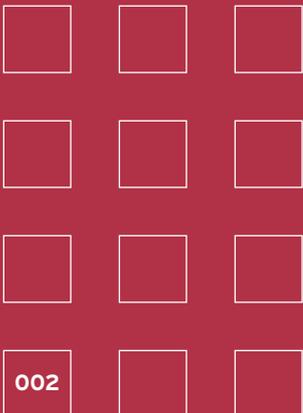
A Summary of the report
and recommendations of
the Skillset/DCMS
Audio Visual Industries
Training Group

SEPTEMBER 2001





Roger Laughton CBE
Chair - Audio-Visual Industries Training Group



INTRODUCTION - TOMORROW'S MEDIA

In Britain the audio-visual media have emerged from a past where broadcasting, film and print were separate activities funded by separate revenue streams. People at the end of their working lives today have lived through an industrial revolution that has changed forever the ways in which information and entertainment are produced and communicated.

Fifty years ago, there were just four radio channels and one television channel in Britain. They were operated by the BBC and paid for by a licence fee levied on every householder who watched television or listened to the radio. The most popular leisure activity was going to the cinema. Film stars, not soap stars, were the household names. There were no video recorders, no tape cassette players, no portable radios, no video discs, no web sites and no computer games. Just two generations ago, today's world of mass popular entertainment was a science fiction fantasy.

Go back one generation. In the 1970s home entertainment, primarily watching BBC1 and ITV, had taken over from the cinema as the dominant leisure activity. A handful of commercial stations had emerged to challenge the BBC's radio dominance. But the choice of home entertainment remained limited. The heavily regulated world of broadcasting was seen as a public service activity, a 'comfortable duopoly', with the BBC funded by compulsory licence fee and ITV by advertising. Those lucky enough to have been awarded an ITV franchise were able to harvest huge revenues from their monopoly of regional advertising.

In the 1980s all this began to change. The application of new technologies extended the range of consumer choice. There was lighter-touch regulation for new cable and satellite television services. A third funding stream, subscription, enabled these channels to compete with the established broadcasters for film and sports rights. A boom in consumer expenditure fuelled the rapid expansion of commercial radio. The same boom saw the beginning of a revival in British film, a revival that has been sustained. But it was still an analogue world. Shortage of bandwidth limited the number of audio and video channels and maintained the need for complex regulatory structures.

Although the 1990 Broadcasting Act emphasises competition, choice and quality, there is no mention whatsoever of the Internet.

Now, in a new millennium, every industry sector has to come to terms with the convergence of distribution and content. There are no limits, save those of the purse and the imagination, to the growth of one-to-one, one-to-many and many-to-many communication and entertainment.

Other developments are playing a part too. People are better off and expect to pay directly for entertainment inside and outside the home. Advertising and subscription revenues have risen sharply, and the BBC's income has kept pace with inflation. Lightweight technology has taken programme making out of the studios into the streets. Content, once created, can be reworked for dozens of different outlets. You can edit a Hollywood movie from a loft in Soho. You can watch a friend's wedding in Australia as it happens.

All this means that the way people work has changed. A new breed of independent television producer appeared in the 1980s, to be followed in the 1990s by a wave of digital content producers.



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INTRODUCTION - TOMORROW'S MEDIA

New sectors, like computer games, are meeting consumer demands for interactive entertainment inside and outside the home. Above all, the arrival of the Internet and the rapid take-up of computers at home and at work has created thousands of jobs with titles nobody had heard of in the twentieth century.

Every sector is going through a period of growth or change. The implications of these far-reaching developments for education and training policies and structures are examined in detail in the AVITG's main report. This short summary provides an overview of the main recommendations. You need to look at the full report to understand why the group reached these recommendations.

The industries surveyed are growing faster than the economy as a whole. They are major contributors to the UK's balance of trade. They promote British creativity and innovation to the rest of the world.

The task of AVITG has been to recommend strategies and policies that will enable these industries to make the most of their major asset, the skills of their workforce.

I wish to thank members of AVITG for their valuable support and thoughtful advice over the past 18 months. The audio-visual industries are fortunate in the extent to which busy people are willing to give their time to help formulate strategy. In particular, the staff of Skillset, the National Training Organisation, have worked tirelessly towards the goal of producing an up-to-date analysis of the needs and aspirations of the industry sectors they represent.

This is a snapshot of a group of industries surfing the wave of industrial change and a strategy to help them ride that wave by investing in the skills of their workforce.

Roger Laughton CBE
Chair - Audio Visual Industries Training Group



The Remit of the AVITG

MISSION STATEMENT

"To investigate and report on the current and future skills required in the audio-visual industries and to recommend the training and education needed to develop these skills, so that the UK can compete effectively in the world media marketplace."

TERMS OF REFERENCE

In detail, the Skillset/DCMS Audio Visual Industries Training Group will:

- seek to establish a common cross-industry methodology for the recording and regular reporting of employment and training information in order to enable effective skills auditing, forecasting and investment analysis;
- scope and interpret all existing labour market and skills forecasting information in order to analyse, as far as possible, current and future skills availability and requirements;
- seek to identify and describe the current levels of investment in training by industry and government and relate future planned spend to identified needs;
- identify the key trends in the development of the audio-visual industries;
- report on whether the provision of training and vocational education is equally available to all who wish to enter or work in the industry, irrespective of race, gender, age, disability, sexual orientation and marital status, and encourage the establishment of proper monitoring procedures;
- identify obstacles to, and make recommendations on, the implementation of appropriate standards and qualifications across the audio-visual industries;
- seek to achieve a more informed and focused partnership between industry and the relevant Government departments. In particular, to explore:
 - the effectiveness of relationships between the Department for Education and Skills/Department of Trade and Industry/Department for Culture, Media and Sport;
 - the effectiveness of relationships with the Qualifications Curriculum Authority, National and Local Learning and Skills Councils, Scottish Executive, Welsh Assembly, the Training and Employment Agency and the Regional Development Agencies;
 - the relevance of vocational education delivered through Further and Higher Education;
 - current initiatives which seek to achieve an integrated approach to the skills needs of interactive media production;
 - the appropriateness and relevance of current training and education structures.
- report and input findings, as appropriate, to other government initiatives, e.g. National Skills Task Force, Creative Industries Task Force, etc.



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Summary of the AVITG Report

Two things need to be said at the outset. First, there is no single approach to the training and education needs of the disparate group of sectors that comprise the audio-visual industries. Each sector needs to identify its own solutions to its own specific problems. Second, the Group did not recognise a clear demarcation between 'training' and 'education'. Just as the best trainers are often those whose wisdom and experience enable colleagues to learn during the course of their everyday work, so the best educators understand the need to relate theory to practice. In the report, training and education are taken to mean communications that happen in and out of the workplace, inside and outside formal structures.

The report sets the audio-visual industries in the context of the fundamental changes brought about by the shift to a knowledge-based global economy. It seeks to report on current investment in training and education, and it identifies the skills gaps and shortages in different industry sectors. The shortage of workers with Information and Communication Technology (ICT) skills remains an issue across all industry sectors.

Section C of the full report recommends a plan of action. It starts with the need for better labour market information. The Group then looked at the provision of training and education from school onwards. Society needs industry sectors committed to lifelong learning for all in order to respond to the changing demands of the information age.

The Group then identified the roles that the individual, Government, employers, unions and Skillset can play in helping the audio-visual industries tackle this agenda. There are proposals for better networks of advice and support for new entrants and for those already in work. There are also specific recommendations to support the Group's determination that the audio-visual industries should be more open to all than they are now.

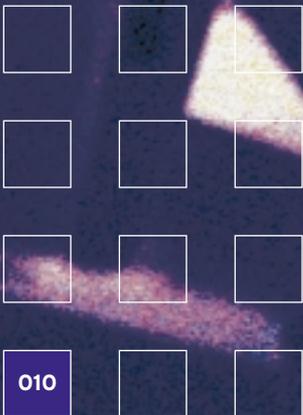
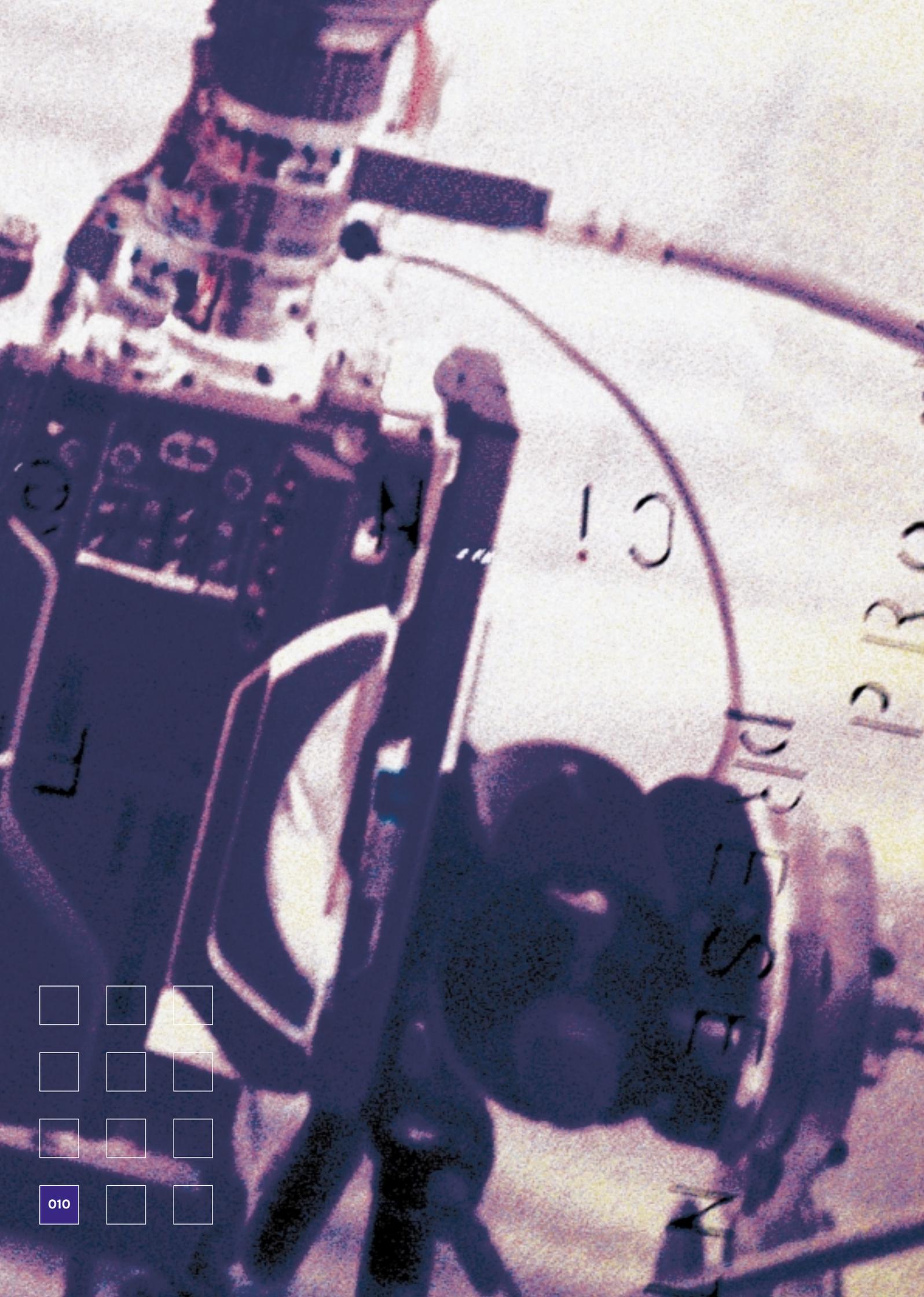
The most difficult short-term issue is the shortage of training opportunities for the large numbers of freelance workers on whom industry sectors depend, and the lack of funding for those freelancers who do have access to training.

AVITG's recommendations apply to the audio-visual industries as a whole. Nevertheless, there are specific opportunities in each nation and region for developing training and education.

There is plenty to celebrate both inside and outside the workplace, but the Group was unanimous in recognising that future competitiveness depends on developing skilled and talented people with the ability to keep on learning in all of the audio-visual industries.

The Group's major recommendations to Governments and industry can be summarised as follows:

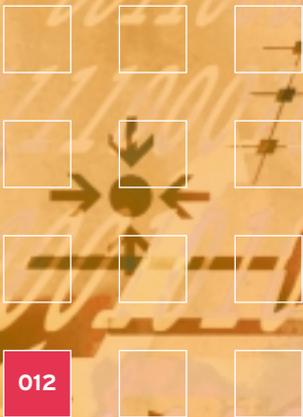
- an on-going programme of research, including an annual Census, to inform employment and training policies;



SKILLS FOR TOMORROW'S MEDIA

- stronger links between post-16 education providers and industry sectors, including the need for vocational centres of excellence;
- opportunities for individuals to learn new skills throughout their working lives at a cost they can afford;
- better industry-wide support mechanisms to ensure adequate investment to meet the training needs of freelancers and small companies;
- recruitment and employment policies that are fair and transparent;
- an increased supply of workers with core ICT skills;
- reliable and accessible advice for all about opportunities in the audio-visual industries;
- the sharing of good practice, including wider use of mentoring;
- 'joined-up' Government - the need for coordination of policies between Governments, Government departments and public agencies in the nations and regions;
- core funding for the National Training Organisation, Skillset, and the Consortia Network to sustain a UK-wide support structure for training.

A copy of the full report and appendices can be found on the Skillset website at www.skillset.org or can be ordered online at the same address or by phoning 020 7534 5300.



The Recommendations in Detail

C1 The Information Task

This section considers in detail past and present labour market and skills information. To identify issues affecting the supply of labour and how best to address them, it is imperative there is accurate, detailed and timely information. AVITG has already put in place and acted on a number of initiatives in this area; most notably the introduction of an annual Census.

The recommendations are:

Skillset should:

- establish a permanent research working group to advise on an on-going programme of research;
- hold an annual Census of employment in all sectors of the audio-visual industries;
- carry out sector-specific research on employment and skills in the interactive media, computer games, post-production, facilities and business to business sectors in 2001/02;
- work with other partner NTOs to produce research on employment and skills in areas of overlap (e.g. Publishing NTO - Digital Content Forum; E-Skills - Computer Games; EMTA - Broadcast Engineering);
- undertake further research to identify education and training supply in FE, HE and the independent training sector;
- develop a methodology, in partnership with key employers and trade associations, to capture reliable cross-sectoral data on investment in training;
- work with national and regional training consortia and relevant public agencies to undertake regular surveys of sectoral skills needs for the English regions, Scotland, Wales and Northern Ireland;
- produce UK-wide sector workforce development plans to inform on-going strategy and investment in partnership with public agencies.

Governments should:

- fund Skillset to undertake the labour market research and skills forecasting intelligence necessary to produce workforce development plans to inform government and industry policy and investment;
- track their investment in education and training sectorally.

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C2 Pre-16 Education: Nurturing Creativity

AVITG believes that creativity needs to be nurtured and encouraged as early as possible and that schools have a vital role to play.

AVITG supported a number of recommendations relating to pre-16 education notably:

Governments, and the relevant qualifications authorities in England, Scotland, Wales and Northern Ireland should ensure that:

- creative and cultural education continues to be central to the school curriculum;
- children are given the opportunity to learn as early as possible the key ICT skills that underpin the creative industries and cultural careers of the future;
- children have access to education about the media's role in society.

National and Regional Development Agencies should actively encourage audio-visual and other creative enterprises to develop in clusters where people can learn from each other.

C3 Post-16 Education and Training: A New Approach

The nature of current vocational education for the post-16 sector, and the need to harness the expertise already committed in this area, was a constant theme in AVITG discussions. This section of the full report concentrates on post-entry education and training schemes provided by the FE/HE sector, independent training providers and employers. One of the major themes examined is the need for more formal relationships between industry sectors and education and training providers.

The recommendations in full are:

Skillset should:

- work with QCA to develop and implement a strategy in England, Wales and Northern Ireland to support the accreditation of qualifications;
- work with the Department for Education and Skills (DfES), Department for Culture, Media and Sport (DCMS), Regional Development Agencies (RDAs) and Local Learning and Skills Councils (LLSCs) to identify and support the establishment of FE Centres of Vocational Excellence (COVES) in England and work with Governments and their agencies in Wales, Scotland and Northern Ireland to support policy developments;
- carry out a consultation within the audio-visual sectors to support the take-up of the Modern Apprenticeship framework across the UK;
- explore the potential for introducing Graduate Apprenticeships into the industry across the UK;
- in partnership with industry organisations, develop and/or provide further support to HE course accreditation schemes across the UK.

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In order to do this, Skillset will:

- consult with other sectors that have identified HE course accreditation as a recommended approach to structuring more formal links between HE providers to identify priorities and potential partnerships;
- undertake research into the different models of accreditation;
- develop, with and on behalf of industry sectors, guidance to support best practice in organising and managing work placement opportunities;
- work with the Broadcast Journalism Training Council (BJTC) to support the existing journalism accreditation model and with the Film Council to pilot an accreditation scheme for screen-writing courses;
- use industry standards to inform accreditation criteria.

Employers should:

- offer targeted support to centres of vocational excellence and accredited courses, (e.g. access to work placements, access to equipment/suppliers linked to the requirements of the course, industry input in delivery and capital investment).

Governments should:

- ensure that Skillset is adequately funded to carry out work to support the development of a qualifications strategy, and to identify and coordinate support for vocational centres of excellence;
- make funding available to support Graduate Apprenticeships within the industry;
- increase the funding to support Modern Apprenticeships within the industry.

C4 Opportunities for the Individual

AVITG is keen to ensure that the necessary structures and support mechanisms are in place and easily accessible to encourage individuals to make the key commitment to learn. In a world where few can expect to stay with one company throughout their working lives, individual acquisition of skills needs to be recognised at all stages of a career.

AVITG recommends that individuals should:

- be prepared to share the cost of relevant training;
- have access to affordable training opportunities at all stages of their working lives.

Skillset should:

- undertake a survey to identify all short courses/Continuing Professional Development (CPD) programmes and update the Skillset/BFI Course Database;
- use **skillsformedia** to publicise Individual Learning Accounts (ILAs) to freelancers and small companies;
- identify priority areas for training.

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Governments and public agencies should:

- allocate funds to stimulate freelance training in areas where priority needs have been identified.

The broadcast journalism sector should introduce a pilot Skills Passport scheme with the support of Skillset.

Independent training providers should be encouraged to map provision against industry standards.

C5 Towards an Open Industry

The need for the audio-visual industries to address under-representation and achieve diversity within its recruitment and employment structures is a key issue. Work is in progress to address this, and AVITG advocates working with and building on these initiatives.

Specifically, AVITG recommends:

Employers should:

- publish employment targets across their own businesses and those with which they have a supply chain relationship (e.g. as well as setting their own targets for recruitment, broadcasters should introduce diversity clauses and monitoring into their contracts with independent production companies);
- participate in Skillset's annual Census to support the on-going collection of information to be used for benchmarking and target setting, and to monitor progress over time;
- encourage effective industry-wide monitoring and tracking mechanisms for those benefiting from the full range of interventions, including access workshops, work placements and bursaries;
- establish and publish targets for recruitment, retention and the progression to senior positions of individuals from under-represented groups;
- support the development of **skillsformedia** and the Skills Investment Fund (SIF) Trainee Network to provide accessible and relevant careers information and advice to new entrants;
- encourage the development of targeted mentoring schemes and career counselling within Small and Medium Sized Enterprises (SMEs) and for freelancers;
- support the development of an industry-recognised approach to the accreditation of FE and HE degree and postgraduate courses;
- fund bursaries and grants to enable individuals from ethnic minorities to start and continue on industry-relevant degree and postgraduate courses;
- increase investment in structured new entrants' schemes which seek to increase the diversity of the workforce in terms of ethnic origin, gender and disability. These should include support for the development of new feeder initiatives that target non-graduates, and of short-term training programmes for graduates to provide fast-track entry into the workforce;

SKILLS FOR TOMORROW'S MEDIA

- work with and through existing networks (e.g. The Broadcasters' Disability Network, Cultural Diversity Network, Women in Film and Television, BECTU's Black Members Advisory Committee, The Gathering and Skillset).

Skillset and the Film Council should work together to address and respond to the specific recommendations on training and development in the BSAC report *Achieving Diversity in the Film Industry*.

C6 Careers: Access for All

A recurrent theme during the AVITG consultation process was the lack of good and up-to-date practical careers information about the audio-visual industries. The demand for careers advice and guidance is significant, particularly in a mainly freelance industry. In response, AVITG instigated the development of **skillsformedia**, a joint partnership between Skillset and BECTU.

It further recommends:

- **skillsformedia** should work with and through employers, industry bodies and other public agencies to establish appropriate partnership arrangements to provide a promotion, signposting and referral service for publicly available employer-produced careers resources.

C7 The Role of Employers

Employers' responsibilities for tackling the skills needs of their sectors extend beyond their own workplaces. Employers have a vested interest in the competitiveness of their sector as a whole. Consequently, they should take an active role in meeting sectoral training needs.

The full report recommends the following additional courses of action:

The BBC should:

- complete the process of making its training facilities and software open to relevant industry sectors on as comprehensive a basis as possible by the autumn of 2001;
- explore, as soon as possible, the feasibility of setting up an online training facility for audio-visual industry workers.

Other companies and institutions should, where practicable, open their courses and educational materials as widely as possible by the autumn of 2002.

Broadcasting employers should begin discussions now with Skillset and industry regulators on a range of measures to improve training and vocational education for freelancers at affordable prices.

Broadcasting employers should begin discussions now with the Independent Television Commission (ITC), the Radio Authority and Skillset to develop an appropriate methodology for the collection of information on training activity and investment.

The Independent Production Training Fund (IPTF) should review the current arrangements regarding investment from the independent television sector.

Skillset should support a sector-wide training strategy for workers in post-production and other facilities companies.

SKILLS FOR TOMORROW'S MEDIA

The International Visual Communication Association (IVCA), the Advertising Producers Association (APA) and advertising agencies should immediately begin discussions with Skillset and Government about developing a skills strategy to be put in place by the beginning of 2002.

Cable and satellite broadcasters and commercial radio companies should actively support Skillset and its work.

Companies in receipt of public funding or tax benefits should be required to participate in cross-industry training activity, with and through the National Training Organisation, as a condition of receiving the benefit.

Employers should work with Skillset to support identified vocational centres of excellence.

C8 The Trade Unions' Role

The unions have recognised that developing an effective skills strategy is vital to the future prosperity of their members. Central to that strategy is the need for a new social partnership model: working proactively with individuals, employers, employers' associations and the National Training Organisations to become practical champions of a lifelong learning culture.

AVITG specifically recommends that:

Unions should:

- invite Skillset and employers to form a joint working party to assist in drafting a model Learning Agreement between employers and unions;
- play a leading role in the provision of effective and current careers advice and mentoring services, open to all;
- be encouraged to champion the development of lifelong learning in the workplace through Union Learning Representatives.

C9 Skillset - The National Training Organisation

The Government has made it clear that skills development should be at the heart of the economic development agenda. As a result of the fundamental changes taking place in post-16 education and training across the UK, UK Governments have engaged in a wide-ranging consultation and review on the future role of NTOs.

Against this backdrop, AVITG recommends that:

Governments across the UK should:

- co-operate and co-ordinate to invest strategically in Skillset, the NTO for the audio-visual industries, at a level appropriate for the core tasks required of the NTO;
- encourage sectors that currently do not provide core funding for Skillset's work to do so.

SKILLS FOR TOMORROW'S MEDIA

Skillset should:

- strengthen its presence and identity in Scotland, Wales and Northern Ireland in response to the devolution of the learning and skills agenda in the UK;
- clarify with the Training Consortia Network the future role they should play in relation to Skillset;
- examine its activities to use its core resources in the most effective manner and, in partnership with the Consortia Network, to encourage appropriate levels of both public and industry investment;
- work closely with other NTOs through the relevant NTO groups and on other areas of specific overlap such as the Digital Content Forum;
- as soon as resources permit, ensure arrangements are in place to monitor the quality of external training courses in industry sectors.

C10 Who Pays?

The AVITG report makes a number of recommendations. Each comes with a cost of implementation. In many cases this cost can be met by allocating existing funds in a different way. However, many recommendations can only happen if new approaches to funding can be identified. In particular, the issue of freelance training must be addressed now.

The Group's unanimous recommendations are:

Education and training should fall in the first tier of OFCOM's* regulatory structure.

In the radio and television sector, OFCOM, in conjunction with Skillset and other relevant industry organisations, should:

- monitor training and education investment made by all licensed broadcasters, with particular emphasis on the investment made to support cross-industry strategies and the training and development of freelancers;
- as part of the monitoring process, introduce a common methodology for assessing the extent, quality and impact of education and training provision that has been agreed with broadcasters;
- agree minimum levels of contribution by broadcasters to the training and development of freelancers, to be made public as a condition of licence. It may be appropriate to consider the public sector broadcasters as a separate group for the purpose of setting levels of contribution;
- enable licensee companies to provide additional external training and education support at regional or national level, focused on the needs of freelancers and small independent producers, through reliefs on payments levied on advertising revenue;
- require all broadcasters to publish their training and vocational education investment and provision on an annual basis.

Television broadcasters should provide IPTF with relevant information about independent productions commissioned and actively support the collection of the IPTF voluntary levy.

SKILLS FOR TOMORROW'S MEDIA

Governments, in addition to the recommendations outlined in **Sections C1, C2, C3, C4 and C9** above should:

- strengthen the tax breaks and credits available for those companies that invest in training their staff and freelancers;
- require companies in receipt of public funding or tax benefits to participate in cross-industry training with or through their National Training Organisation;
- bring together top management, the NTO and trade associations in sectors where no skills strategy has yet been agreed to consider how and when effective long-term investment strategies can be put in place;
- work with the NTO to focus strategic investment on the local needs of industry sectors, as articulated in Workforce Development Plans;
- track their investment in training on a sector-by-sector basis to enable an accurate assessment of strategic investment.

The performance of the Skills Investment Fund to date should be monitored as part of the on-going process established by Skillset and DCMS. The next formal review should take place in December 2001, as planned.

Individuals should have the right to affordable and relevant training at all stages of their working lives, whether in or out of 'work'.

*[OFCOM has yet to be established. There is no reason why existing regulators should not be asked by Government to act jointly to implement proposals before OFCOM is set up.

REFLECTING NATIONAL AND REGIONAL IDENTITIES

Recognising the creative, cultural, economic and political diversity of the UK was a primary concern for AVITG. In addition to the overall recommendations above, the following are specific to Scotland, Wales, Northern Ireland and the English Regions:

D1 Scotland

Pending the outcome of the on-going review of non-departmental public bodies in Scotland, (which includes Scottish Screen) and the NTO Review, roles between these agencies and other bodies will be clarified. The appropriate agencies should work together to ensure the following:

The establishment, as a priority, of an employer-led panel representing the broadcast, film, video and interactive media sectors, working closely with Skillset and Scottish Screen, to advise and lead on an industry skills strategy for Scotland;

The development of a broad cross-industry advisory panel that brings higher and further education together with industry to recommend improved mechanisms for linking demand and supply in Scotland, as well as other linked issues;

A rolling programme of research, mapping industry trends and skills needs should be initiated by Skillset and linked to Future Skills Scotland;

Better use of existing public frameworks and funding in Scotland to match industry funding for skills development and training;

Linking **skillsformedia** Scotland to the Scottish University for Industry (Sufi)/Learndirect to provide a Scottish portal for comprehensive careers information for pre-entrants, new entrants, freelancers, staff and companies in Scotland;

Extension and promotion of management skills for the industry, including sourcing and promotion of generic management skills courses and programmes;

Establishment of a rolling programme of training in other key areas where gaps have been identified, including production and writing;

Promotion of a skills and learning culture in companies and among freelancers;

Development of a programme to promote professional recruitment practices in the sector.

Skillset should:

- enhance its presence and identity in Scotland in response to the devolution of the UK learning and skills agenda;
- Work closely with the Scottish Parliament's Enterprise and Lifelong Learning Committee throughout its enquiry.

SKILLS FOR TOMORROW'S MEDIA

The Scottish Executive should articulate more clearly its recognition of and support for NTOs as employer-led strategic skills bodies for their sectors, to facilitate a better understanding of the roles and relationships between NTOs and Government agencies at Scottish and UK levels.

D2 Wales

In line with the National Economic Development Strategy, the National Assembly for Wales should designate the audio-visual and digital media sectors as priority economic development sectors for Wales;

The National Assembly, Education and Learning Wales (ELWa), Welsh Development Agency (WDA) and the industry should work together to formulate the key elements of a sector development strategy. A task and finish working group featuring representatives of each of these sectors should be established to take this work forward.

Skillset should:

- enhance its presence and identity in Wales in response to the devolution of the UK learning and skills agenda;
- initiate a rolling programme of research, mapping industry trends and skills needs linked to Future Skills Wales;
- work with ELWa/Media Skills Wales/Cyfle/Sgrin and other providers to devise a comprehensive training strategy aimed at addressing both skills shortages and business development needs;
- work closely with Media Skills Wales/Cyfle to develop the necessary structures to enable full and appropriate implementation of relevant UK initiatives and accreditation of vocational courses within FE/HE.

Media Skills Wales/Cyfle should ensure that the sector is aware of the industry qualifications available, of the key issues in the industry identified by the AVITG, and that it is familiar with any proposals for change.

Companies operating in traditional and new media should be encouraged, building on the New Media Group at Sgrin and Media Skills Wales/Cyfle's work with this sector, to develop their commitment to training and development.

The existing North Wales cluster development proposals should be adapted and adopted for the whole of Wales.

The Wales Digital College should be used as a platform for supply chain development courses for the sector.

The Welsh Development Agency should establish priority funding lines to maximise the ability of Welsh audio-visual companies to globally market and exploit their products.

All organisations providing careers advice in Wales should ensure a clearer distinction is made between general academic media studies provision and vocational provision, and, as a priority, target young people, especially women and those from ethnic minorities, to consider vocational routes.

Particular attention should be accorded to the development of interactive media in rural and European Union Objective 1 areas.

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D3 Northern Ireland

Skillset should enhance its presence and identity in Northern Ireland in response to the devolution of the UK learning and skills agenda.

Skillset, in partnership with the Sector Training Council (STC) - in practice both the NIFC and its Training Committee - should:

- carry out regular audits of the industry's development needs, ideally on an annual basis;
- ensure that the recommendations of the current sector reviews outlined above (traditional and new media) are addressed by the industry and relevant bodies on an interdepartmental basis;
- secure training/development funding for the industry in Northern Ireland, at a financial level consistent with the rest of the UK;
- develop further an industry-specific careers advisory service for those entering and already in the industry, in line with **skillsformedia**;
- develop, with Northern Ireland Interactive Multimedia Association (NIIMA) and local industry partners, a training infrastructure for interactive media which is responsive to the industry's changing needs.

The STC should:

- work together with industry partners, to continue to promote professional qualifications and to secure access to assessment opportunities by 2002, resources permitting;
- review and develop its new entrants' training scheme, building on current good practice, by 2003;
- work with NIIMA to develop a 'Training for Trainers' programme to maximise the potential of skills present in Northern Ireland;
- continue to provide and further develop structured programmes addressing equal opportunity issues;
- continue to make contact with expatriate Northern Irish professionals working outside Northern Ireland to take advantage of their knowledge and contacts and to transfer knowledge and skills to the sector;
- continue to develop cross-border partnership opportunities with the Republic of Ireland.

The Department of Culture, Arts and Leisure (DCAL) should implement the pilot project for training in the Irish language as soon as is practicable.

D4 English Regions

In the light of the NTO Review, industries should:

- consider the role they wish the training consortia to play, and how they will fund their core activities in the regions;
- consider how best to separate each individual training consortium's strategic role from its operational training provision role;

SKILLS FOR TOMORROW'S MEDIA

- continue to develop a more strategic and consistent approach to representation on training consortia boards across the English regions, ensuring that new representatives are inducted and familiarised with corporate policy in relation to Skillset and the training consortia, and are aware of pan-regional as well as local issues.

Training consortia should ensure that they have adequate representation on their boards from all the audio-visual sectors active in their regions, with particular reference to the radio, interactive media and computer games sectors.

RDAs should provide core funding as a match for industry investment to enable Skillset and the training consortia to work effectively in the regions, with the LLSCs supporting the delivery of Workforce Development Plans.

Skillset and the training consortia should promote more vigorously to the Regional Development Agencies and the Local Learning and Skills Councils the economic importance, profile and needs of the sector.

Skillset should:

- revise the kitemarking system in a way that recognises the separate functions of strategy and delivery;
- work more closely with the consortia and regional bodies, in particular the RDAs, LLSCs and Small Business Service (SBS), to provide better and more consistent information to local industry on sources of training, trainers and courses available across the English regions;
- continue to support and disseminate models of good practice throughout training consortia across the regions;
- develop a strategic approach to working with the regional and national Labour Market Intelligence (LMI) units and skills observatories.

SKILLS FOR TOMORROW'S MEDIA

SKILLSET/DCMS - AVITG WORKING GROUPS

We are indebted to all those individuals and organisations that gave willingly of their time and experience to assist the group's work.

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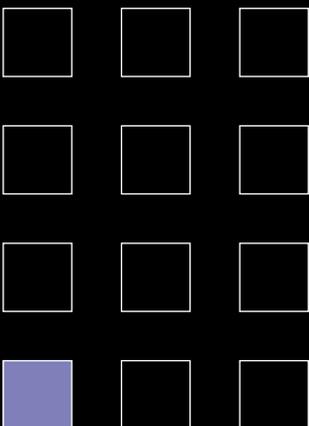
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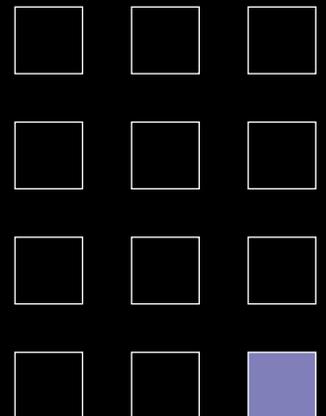
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**SKILLS FOR
TOMORROW'S MEDIA**

The Report of the
Skillset/DCMS
Audio Visual Industries
Training Group

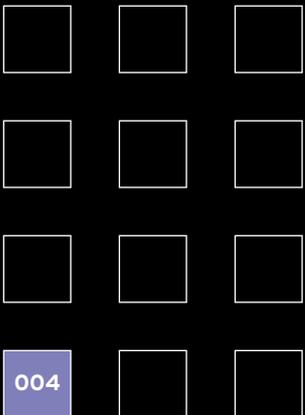
SEPTEMBER 2001





SKILLS FOR TOMORROW'S MEDIA

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Chair of the Audio Visual Industries Training Group	007
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FOREWORD

The audio-visual industries are an exciting, growing part of the economy, providing employment for over 200,000 people. These industries offer some of the best, most rewarding careers around and should have no shortage of recruits and talented people wanting to become part of them. But we need to ensure that the skills of those wanting to enter the industry and already within it match the requirements - that there is not over supply in some areas and scarcity in others.

It is already apparent, with the rapid technological changes the audio-visual industries are undergoing, that achieving the right quality of skills will be vital to the sector if it is to succeed in a new, converged and ever more competitive market.

That is why the Department for Culture, Media and Sport, together with Skillset, set up the Audio-Visual Industries Training Group in 1999. The Group's mission was to investigate and report on the current and future skills required in the audio-visual industries and to recommend the training and education needed to develop these skills so that the UK can compete effectively in the world media marketplace.

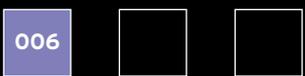
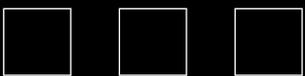
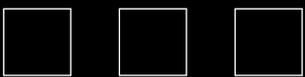
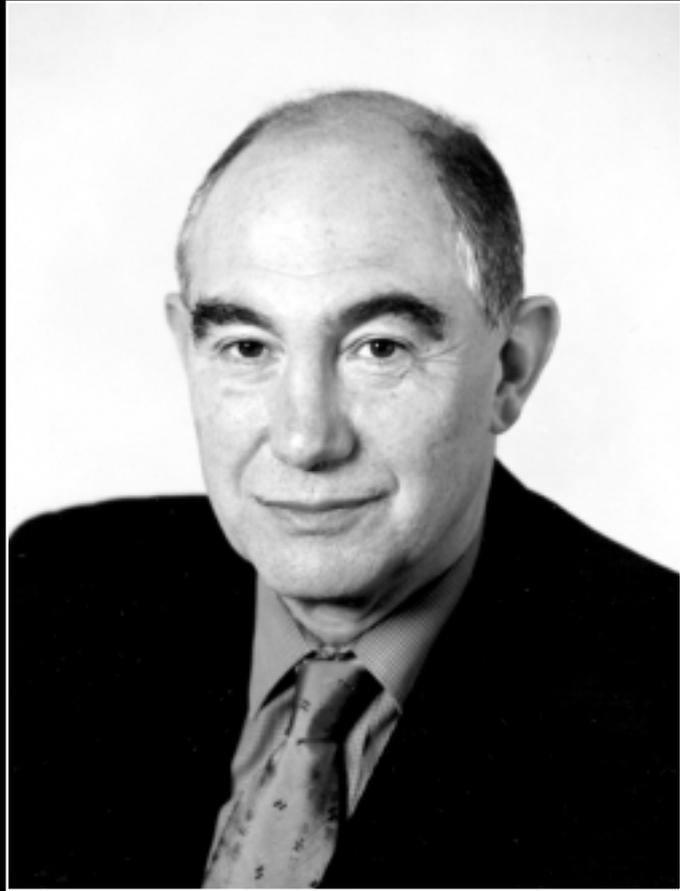
This report represents the fruits of the Group's analysis and investigation. I know that a great deal of hard work has gone into it and I am very grateful to all those who gave up their time so willingly and enthusiastically. Particular thanks are due to the Chair of the Group, Roger Laughton, and to Dinah Caine and her team at Skillset.

The report makes a number of recommendations, aimed at individuals, employers, trades unions, education and training providers, Skillset and Government. I look forward to considering these over the coming months with colleagues in Whitehall and the devolved administrations.

Dr Kim Howells MP

Parliamentary Under-Secretary of State

(and Minister for Tourism, Film and Broadcasting).



INTRODUCTION - TOMORROW'S MEDIA

In Britain the audio-visual media have emerged from a past where broadcasting, film and print were separate activities funded by separate revenue streams. People at the end of their working lives today have lived through an industrial revolution that has changed forever the ways in which information and entertainment are produced and communicated.

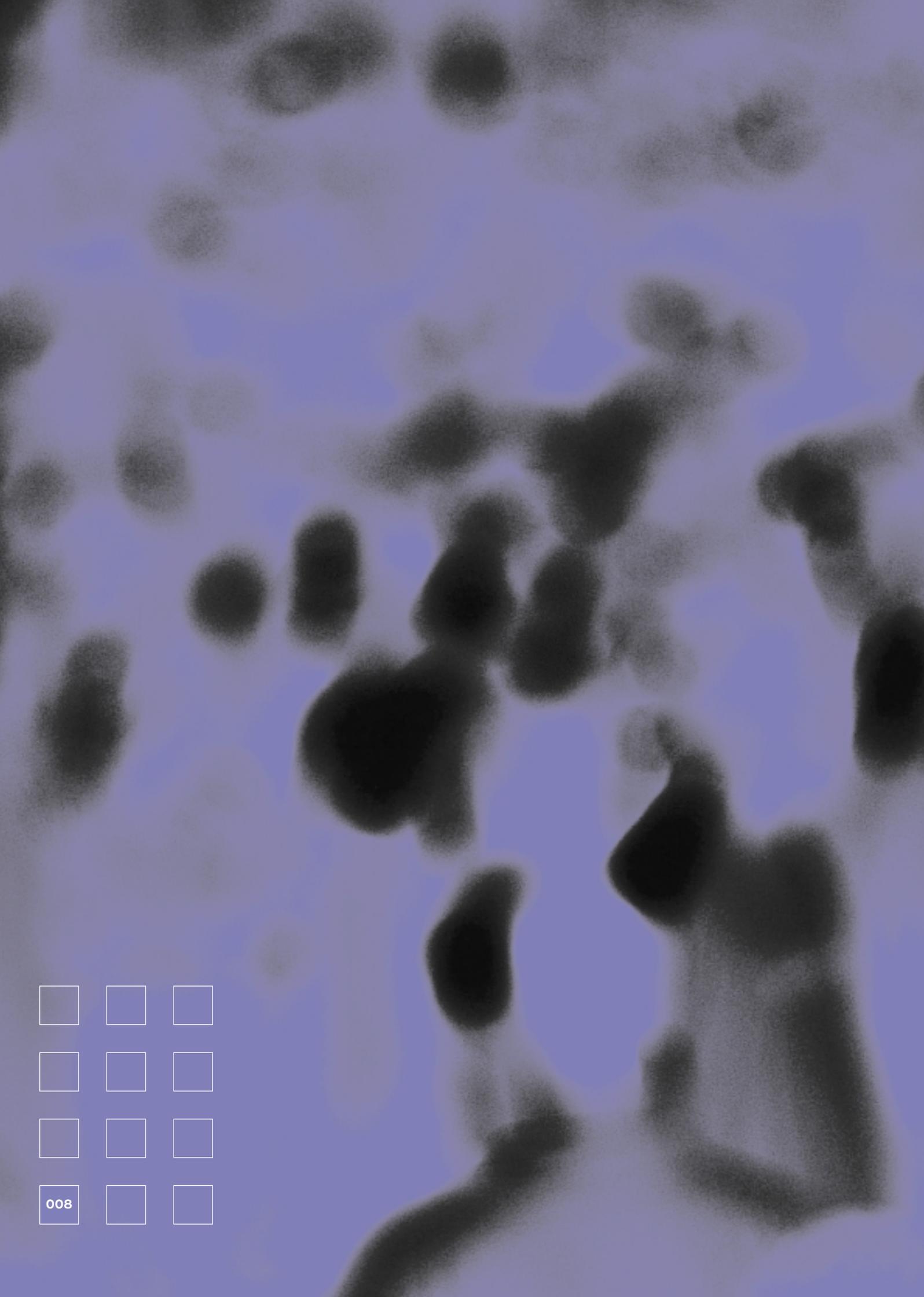
Fifty years ago, there were just four radio channels and one television channel in Britain. They were operated by the BBC and paid for by a licence fee levied on every householder who watched television or listened to the radio. The most popular leisure activity was going to the cinema. Film stars, not soap stars, were the household names. There were no video recorders, no tape cassette players, no portable radios, no video discs, no web sites and no computer games. Just two generations ago, today's world of mass popular entertainment was a science fiction fantasy.

Go back one generation. In the 1970s home entertainment, primarily watching BBC1 and ITV, had taken over from the cinema as the dominant leisure activity. A handful of commercial stations had emerged to challenge the BBC's radio dominance. But the choice of home entertainment remained limited. The heavily regulated world of broadcasting was seen as a public service activity, a 'comfortable duopoly', with the BBC funded by compulsory licence fee and ITV by advertising. Those lucky enough to have been awarded an ITV franchise were able to harvest huge revenues from their monopoly of regional advertising.

In the 1980s all this began to change. The application of new technologies extended the range of consumer choice. There was lighter-touch regulation for new cable and satellite television services. A third funding stream, subscription, enabled these channels to compete with the established broadcasters for film and sports rights. A boom in consumer expenditure fuelled the rapid expansion of commercial radio. The same boom saw the beginning of a revival in British film, a revival that has been sustained. But it was still an analogue world. Shortage of bandwidth limited the number of audio and video channels and maintained the need for complex regulatory structures.

Although the 1990 Broadcasting Act emphasises competition, choice and quality, there is no mention whatsoever of the Internet.

Now, in a new millennium, every industry sector has to come to terms with the convergence of distribution and content. There are no limits, save those of the purse and the imagination, to the growth of one-to-one, one-to-many and many-to-many communication and entertainment.



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INTRODUCTION - TOMORROW'S MEDIA

Other developments are playing a part too. People are better off and expect to pay directly for entertainment inside and outside the home. Advertising and subscription revenues have risen sharply, and the BBC's income has kept pace with inflation. Lightweight technology has taken programme making out of the studios into the streets. Content, once created, can be reworked for dozens of different outlets. You can edit a Hollywood movie from a loft in Soho. You can watch a friend's wedding in Australia as it happens.

All this means that the way people work has changed. A new breed of independent television producer appeared in the 1980s, to be followed in the 1990s by a wave of digital content producers.

New sectors, like computer games, are meeting consumer demands for interactive entertainment inside and outside the home. Above all, the arrival of the Internet and the rapid take-up of computers at home and at work has created thousands of jobs with titles nobody had heard of in the twentieth century.

Every sector is going through a period of growth or change. The implications of these far-reaching developments for education and training policies and structures are examined in this report.

The industries surveyed are growing faster than the economy as a whole. They are major contributors to the UK's balance of trade. They promote British creativity and innovation to the rest of the world.

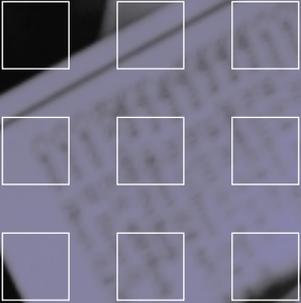
The task of the Audio Visual Industries Training Group (AVITG) has been to recommend strategies and policies that will enable these industries to make the most of their major asset, the skills of their workforce.

I wish to thank members of the AVITG for their valuable support and thoughtful advice over the past 18 months. The audio-visual industries are fortunate in the extent to which busy people are willing to give their time to help formulate strategy. In particular, the staff of Skillset, the National Training Organisation, have worked tirelessly towards the goal of producing an up-to-date analysis of the needs and aspirations of the industry sectors they represent.

This is a snapshot of a group of industries surfing the wave of industrial change and a strategy to help them ride that wave by investing in the skills of their workforce.

Roger Laughton CBE

Chair - Audio Visual Industries Training Group



SECTION A - SUMMARY AND RECOMMENDATIONS



SECTION A - SUMMARY AND RECOMMENDATIONS

1. The Remit of the AVITG

Mission Statement

"To investigate and report on the current and future skills required in the audio-visual industries and to recommend the training and education needed to develop these skills, so that the UK can compete effectively in the world media marketplace."

Terms of reference

In detail, the Skillset/DCMS Audio Visual Industries Training Group will:

- seek to establish a common cross-industry methodology for the recording and regular reporting of employment and training information in order to enable effective skills auditing, forecasting and investment analysis;
- scope and interpret all existing labour market and skills forecasting information in order to analyse, as far as possible, current and future skills availability and requirements;
- seek to identify and describe the current levels of investment in training by industry and government and relate future planned spend to identified needs;
- identify the key trends in the development of the audio-visual industries;
- report on whether the provision of training and vocational education is equally available to all who wish to enter or work in the industry, irrespective of race, gender, age, disability, sexual orientation and marital status, and encourage the establishment of proper monitoring procedures;
- identify obstacles to, and make recommendations on, the implementation of appropriate standards and qualifications across the audio-visual industries;
- seek to achieve a more informed and focused partnership between industry and the relevant Government departments. In particular, to explore:
 - the effectiveness of relationships between the Department for Education and Skills/Department of Trade and Industry/Department for Culture, Media and Sport;
 - the effectiveness of relationships with the Qualifications Curriculum Authority, National and Local Learning and Skills Councils, Scottish Executive, Welsh Assembly, the Training and Employment Agency and the Regional Development Agencies;
 - the relevance of vocational education delivered through Further Education/Higher Education;
 - current initiatives which seek to achieve an integrated approach to the skills needs of interactive media production;

SECTION A - SUMMARY AND RECOMMENDATIONS

–the appropriateness and relevance of current training and education structures.

- report and input findings, as appropriate, to other Government initiatives, e.g. National Skills Task Force, Creative Industries Task Force etc.

2. Summary of the AVITG Report

The AVITG report is intended to provide an overview of training and education in Britain's audio-visual industries. Two things need to be said at the outset. First, there is no single approach to the training and education needs of the disparate group of sectors that comprise the audio-visual industries. Each sector needs to identify its own solutions to its own specific problems. Second, the Group did not recognise a clear demarcation between 'training' and 'education'. Just as the best trainers are often those whose wisdom and experience enable colleagues to learn during the course of their everyday work, so the best educators understand the need to relate theory to practice. In this report, training and education are communications that happen in and out of the workplace, inside and outside formal structures.

Section B sets the audio-visual industries in the context of the fundamental changes brought about by the shift to a knowledge-based global economy. It reports on current investment in training and education, and it identifies the skills gaps and shortages in different industry sectors. The shortage of workers with Information and Communication Technology (ICT) skills remains an issue across all industry sectors.

Section C recommends a plan of action. It starts with the need for better labour market information. The Group then looked at the provision of training and education from school onwards. Society needs industry sectors committed to lifelong learning for all in order to respond to the changing demands of the information age.

The Group then identified the roles that the individual, Government, employers, unions and Skillset can play in helping the audio-visual industries tackle this agenda. There are proposals for better networks of advice and support for new entrants and for those already in work. There are also specific recommendations to support the Group's determination that the audio-visual industries should be more open to all than they are now.

The most difficult short-term issue is the shortage of training opportunities for the large numbers of freelance workers on whom industry sectors depend, and the lack of funding for those freelancers who do have access to training. The Group identified policies to address these issues, which are set out in **Section C10**.

SECTION A - SUMMARY AND RECOMMENDATIONS

AVITG's recommendations apply to the UK audio-visual industries as a whole. Nevertheless, there are specific opportunities in each nation and region for developing training and education. These are addressed in **Section D**.

There is plenty to celebrate in the report, inside and outside the workplace, but AVITG was unanimous in recognising that future competitiveness depends on developing skilled people with the ability to keep on learning in all the audio-visual industries.

The Group's major recommendations to Governments and industry can be summarised as follows:

- an on-going programme of research, including an annual Census, to inform employment and training policies;
- stronger links between post-16 education providers and industry sectors, including the need for vocational centres of excellence;
- opportunities for individuals to learn new skills throughout their working lives at a cost they can afford;
- better industry-wide support mechanisms to ensure adequate investment to meet the training needs of freelancers and small companies;
- recruitment and employment policies that are fair and transparent;
- an increased supply of workers with core ICT skills;
- reliable and accessible advice for all about opportunities in the audio-visual industries;
- the sharing of good practice, including wider use of mentoring;
- 'joined-up' Government - the need for coordination of policies between Governments, Government departments and public agencies in the nations and regions;
- core funding for the National Training Organisation, Skillset, and the Consortia Network to sustain a UK-wide support structure for training.

3. The Recommendations in Brief

C1 The Information Task

Skillset should:

- establish a permanent research working group to advise on an on-going programme of research;
- hold an annual Census of employment in all sectors of the audio-visual industries;

SECTION A - SUMMARY AND RECOMMENDATIONS

- carry out sector-specific research on employment and skills in the interactive media, computer games, post-production, facilities and business to business sectors in 2001/02;
- work with other partner NTOs to produce research on employment and skills in areas of overlap (e.g. Digital Content Forum - Publishing, E-Skills - Computer Games, EMTA - Broadcast Engineering);
- undertake further research to identify education and training supply in FE, HE and the independent training sector;
- develop a methodology, in partnership with key employers and trade associations, to capture reliable cross-sectoral data on investment in training;
- work with national and regional training consortia and relevant public agencies to undertake regular surveys of sectoral skills needs for the English regions, Scotland, Wales and Northern Ireland;
- produce UK-wide sector workforce development plans to inform on-going strategy and investment in partnership with public agencies.

Governments should:

- fund Skillset to undertake the labour market research and skills forecasting intelligence necessary to produce workforce development plans to inform government and industry policy and investment;
- track their investment in education and training sectorally.

C2 Pre-16 Education: Nurturing Creativity

Governments and the relevant qualifications authorities should ensure that:

- creative and cultural education continues to be central to the school curriculum;
- children are given the opportunity to learn as early as possible the key ICT skills that underpin the creative industries and cultural careers of the future;
- children have access to education about the media's role in society.

National and Regional Development Agencies should actively encourage audio-visual and other creative enterprises to develop in clusters where people can learn from each other.

C3 Post-16 Education and Training: A New Approach

Skillset should:

- work with QCA to develop and implement a strategy in England, Wales and Northern Ireland to support the accreditation of qualifications;

SECTION A - SUMMARY AND RECOMMENDATIONS

- work with the DfES, DCMS, RDAs and LLSCs to identify and support the establishment of FE Centres of Vocational Excellence (COVES) in England and work with Governments and their agencies in Wales, Scotland and Northern Ireland to support policy developments;
- carry out a consultation within the audio-visual sectors to support the take-up of the Modern Apprenticeship framework across the UK;
- explore the potential for introducing Graduate Apprenticeships into the industry across the UK;
- in partnership with industry organisations, develop and/or provide further support to HE course accreditation schemes across the UK.

In order to do this, Skillset will:

- consult with other sectors (**Appendix B**) that have identified HE course accreditation as a recommended approach to structuring more formal links between HE providers to identify priorities and potential partnerships;
- undertake research into the different models of accreditation;
- develop, with and on behalf of industry sectors, guidance to support best practice in organising and managing work placement opportunities;
- work with the BJTC to support the existing journalism accreditation model and with the Film Council to pilot an accreditation scheme for screen-writing courses;
- use industry standards to inform accreditation criteria.

Employers should:

- offer targeted support to centres of vocational excellence and accredited courses (e.g. access to work placements, access to equipment/suppliers linked to the requirements of the course, industry input in delivery and capital investment).

Governments should:

- ensure that Skillset is adequately funded to carry out work to support the development of a qualifications strategy, and to identify and coordinate support for vocational centres of excellence;
- make funding available to support Graduate Apprenticeships within the industry;
- increase the funding to support Modern Apprenticeships within the industry.

C4 Opportunities for the Individual

Individuals should:

- be prepared to share the cost of relevant training;
- have access to affordable training opportunities at all stages of their working lives;

SECTION A - SUMMARY AND RECOMMENDATIONS

Skillset should:

- undertake a survey to identify all short courses/CPD programmes and update the Skillset/BFI Course Database;
- use **skillsformedia** to publicise ILAs to freelancers and small companies;
- identify priority areas for training.

Governments and public agencies should:

- allocate funds to stimulate freelance training in areas where priority needs have been identified.

The broadcast journalism sector should introduce a pilot Skills Passport scheme with the support of Skillset.

Independent Training Providers should be encouraged to map provision against industry standards.

C5 Towards an Open Industry

Employers should:

- publish employment targets across their own businesses and those with which they have a supply chain relationship (e.g. as well as setting their own targets for recruitment, broadcasters should introduce diversity clauses and monitoring into their contracts with independent production companies);
- participate in Skillset's annual Census to support the on-going collection of information to be used for benchmarking and target setting, and to monitor progress over time;
- encourage effective industry-wide monitoring and tracking mechanisms for those benefiting from the full range of interventions, including access workshops, work placements and bursaries;
- establish and publish targets for recruitment, retention and the progression to senior positions of individuals from under-represented groups;
- support the development of **skillsformedia** and the SIF Network to provide accessible and relevant careers information and advice to new entrants;
- encourage the development of targeted mentoring schemes and career counselling within SMEs and for freelancers;
- support the development of an industry-recognised approach to the accreditation of FE and HE degree and postgraduate courses;
- fund bursaries and grants to enable individuals from ethnic minorities to start and continue on industry-relevant degree and postgraduate courses;
- increase investment in structured new entrants' schemes which seek to increase the diversity of the workforce in terms of ethnic origin, gender and disability. These should include support for the development of new feeder initiatives that target non-graduates, and of short-term training programmes for graduates to provide fast-track entry into the workforce;

SECTION A - SUMMARY AND RECOMMENDATIONS

- work with and through existing networks (e.g. The Broadcasters' Disability Network, Cultural Diversity Network, Women in Film and Television, BECTU's Black Members Advisory Committee, The Gathering and Skillset).

Skillset and The Film Council should work together to address and respond to the specific recommendations on training and development in the BSAC report *Achieving Diversity in the Film Industry*.

C6 Careers: Access for All

- **skillsformedia** should work with and through employers, industry bodies and other public agencies to establish appropriate partnership arrangements to provide a promotion, signposting and referral service for publicly available employer-produced careers resources.

C7 The Role of Employers

The BBC should:

- complete the process of making its training facilities and software open to relevant industry sectors on as comprehensive a basis as possible by the autumn of 2001;
- explore, as soon as possible, the feasibility of setting up an online training facility for audio-visual industry workers.

Other companies and institutions should, where practicable, open their courses and educational materials as widely as possible by the autumn of 2002.

Broadcasting employers should begin discussions now with Skillset and industry regulators on a range of measures to improve training and vocational education for freelancers (**see also Section C10**) at affordable prices.

Broadcasting employers should begin discussions now with ITC, the Radio Authority and Skillset to develop an appropriate methodology for the collection of information on training activity and investment.

The IPTF should review the current arrangements regarding investment from the independent television sector.

Skillset should support a sector-wide training strategy for workers in post-production and other facilities companies.

The IVCA APA, and advertising agencies should immediately begin discussions with Skillset and government about developing a skills strategy to be put in place by the beginning of 2002.

Cable and satellite broadcasters and commercial radio companies should actively support Skillset and its work.

Companies in receipt of public funding or tax benefits should be required to

SECTION A - SUMMARY AND RECOMMENDATIONS

participate in cross-industry training activity, with and through the National Training Organisation, as a condition of receiving the benefit.

Employers should work with Skillset to support identified vocational centres of excellence.

C8 The Trade Unions' Role

Unions should:

- invite Skillset and employers to form a joint working party to assist in drafting a model Learning Agreement between employers and unions;
- play a leading role in the provision of effective and current careers advice and mentoring services, open to all;
- be encouraged to champion the development of lifelong learning in the workplace through Union Learning Representatives.

C9 Skillset - The National Training Organisation (NTO)

Governments across the UK should:

- co-operate and co-ordinate to invest strategically in Skillset, the NTO for the audio-visual industries, at a level appropriate for the core tasks required of the NTO;
- encourage sectors that currently do not provide core funding for Skillset's work to do so.

Skillset should:

- strengthen its presence and identity in Scotland, Wales and Northern Ireland in response to the devolution of the learning and skills agenda in the UK;
- clarify with the Training Consortia the future role they should play in relation to Skillset;
- examine its activities to use its core resources in the most effective manner and, in partnership with the Consortia Network, to encourage appropriate levels of both public and industry investment;
- work closely with other NTOs through the relevant NTO groups and on other areas of specific overlap such as the Digital Content Forum;
- as soon as resources permit, ensure arrangements are in place to monitor the quality of external training courses in industry sectors.

C10 Who Pays?

Education and training should fall in the first tier of OFCOM's* regulatory structure.

In the radio and television sector, OFCOM, in conjunction with Skillset and other relevant industry organisations, should:

SECTION A - SUMMARY AND RECOMMENDATIONS

- monitor training and education investment made by all licensed broadcasters, with particular emphasis on the investment made to support cross-industry strategies and the training and development of freelancers;
- as part of the monitoring process, introduce a common methodology for assessing the extent, quality and impact of education and training provision that has been agreed with broadcasters;
- agree minimum levels of contribution by broadcasters to the training and development of freelancers, to be made public as a condition of licence. It may be appropriate to consider the public sector broadcasters as a separate group for the purpose of setting levels of contribution;
- enable licensee companies to provide additional external training and education support at regional or national level, focused on the needs of freelancers and small independent producers, through reliefs on payments levied on advertising revenue;
- require all broadcasters to publish their training and vocational educational investment and provision on an annual basis.

Television broadcasters should provide IPTF with relevant information about independent productions commissioned and actively support the collection of the IPTF voluntary levy.

Governments, in addition to the recommendations outlined in **Sections C1, C2, C3, C4 and C9**, should:

- strengthen the tax breaks and credits available for those companies that invest in training their staff and freelancers;
- require companies in receipt of public funding or tax benefits to participate in cross-industry training with or through their National Training Organisation;
- bring together top management, the NTO and trade associations in sectors where no skills strategy has yet been agreed to consider how and when effective long-term investment strategies can be put in place;
- work with the NTO to focus strategic investment on the local needs of industry sectors, as articulated in Workforce Development Plans;
- track their investment in training on a sector-by-sector basis to enable an accurate assessment of strategic investment.

The performance of the Skills Investment Fund to date should be monitored as part of the on-going process established by Skillset and DCMS. The next formal review should take place in December 2001, as planned.

Individuals should have the right to affordable and relevant training at all stages of their working lives, whether in or out of 'work'.

*[OFCOM has yet to be established. There is no reason why existing regulators should not be asked by Government to act jointly to implement proposals before OFCOM is set up.]

D1 Scotland

These recommendations are in addition to the overall AVITG recommendations.

Pending the outcome of the on-going review of non-departmental public bodies in Scotland, (which includes Scottish Screen) and the NTO Review, roles between these agencies and other bodies will be clarified. The appropriate agencies should work together to ensure the following:

- The establishment, as a priority, of an employer-led panel representing the broadcast, film, video and interactive media sectors, working closely with Skillset and Scottish Screen, to advise and lead on an industry skills strategy for Scotland;
- The development of a broad cross-industry advisory panel that brings FE/HE together with industry to recommend improved mechanisms for linking demand and supply in Scotland, as well as other linked issues;
- A rolling programme of research, mapping industry trends and skills needs should be initiated by Skillset and linked to Future Skills Scotland;
- Better use of existing public frameworks and funding in Scotland to match industry funding for skills development and training;
- Linking **skillsformedia** Scotland to the Scottish University for Industry (Sufi)/Learndirect to provide a Scottish portal for comprehensive careers information for pre-entrants, new entrants, freelancers, staff and companies in Scotland;
- Extension and promotion of management skills for the industry, including sourcing and promotion of generic management skills courses and programmes;
- Establishment of a rolling programme of training in other key areas where gaps have been identified, including production and writing;
- Promotion of a skills and learning culture in companies and among freelancers;
- Development of a programme to promote professional recruitment practices in the sector.

Skillset should:

- Enhance its presence and identity in Scotland in response to the devolution of the UK learning and skills agenda;
- Work closely with the Scottish Parliament's Enterprise and Lifelong Learning Committee throughout its enquiry.

The Scottish Executive should articulate more clearly its recognition of and support for NTOs as employer-led strategic skills bodies for their sectors, to facilitate a better understanding of the roles and relationships between NTOs and government agencies at Scottish and UK levels.

SECTION A - SUMMARY AND RECOMMENDATIONS

D2 Wales

In addition to the recommendations contained in this report, recommendations specific to Wales are:

In line with the National Economic Development Strategy, the National Assembly for Wales should designate the audio-visual and digital media sectors as priority economic development sectors for Wales.

The National Assembly, ELWa, WDA and the industry should work together to formulate the key elements of a sector development strategy. A task and finish working group featuring representatives of each of these sectors should be established to take this work forward.

Skillset should:

- enhance its presence and identity in Wales in response to the devolution of the UK learning and skills agenda;
- initiate a rolling programme of research, mapping industry trends and skills and needs linked to Future Skills Wales;
- work with ELWa/Media Skills Wales/Cyfle/Sgrin and other providers to devise a comprehensive training strategy aimed at addressing both skills shortages and business development needs;
- work closely with Media Skills Wales/Cyfle to develop the necessary structures to enable full and appropriate implementation of relevant UK initiatives and accreditation of vocational courses within FE/HE.

Media Skills Wales/Cyfle should ensure that the sector is aware of the industry qualifications available, of the key issues in the industry identified by the AVITG, and that it is familiar with any proposals for change.

Companies operating in traditional and new media should be encouraged, building on the New Media Group at Sgrin and Media Skills Wales/Cyfle's work with this sector, to develop their commitment to training and development.

The existing North Wales cluster development proposals¹ should be adapted and adopted for the whole of Wales.

The Wales Digital College² should be used as a platform for supply chain development courses for the sector.

The Welsh Development Agency should establish priority funding lines to maximise the ability of Welsh audio-visual companies to globally market and exploit their products.

All organisations providing careers advice in Wales should ensure a clearer distinction is made between general academic media studies provision and vocational provision, and, as a priority, target young people, especially women and those from ethnic minorities, to consider vocational routes.

Particular attention should be accorded to the development of interactive media in rural and European Union Objective 1 areas.

¹ See Future Skills Wales report, York Consulting Ltd, (August 2000), p 27

² The Wales Digital College is a partnership between S4C, Acen (a trust dedicated to promoting the teaching of Welsh) and FE colleges in Wales. It uses a combination of digital TV, the internet and traditional teaching methods to support lifelong learning in Wales.

D3 Northern Ireland

In addition to the recommendations contained in this report, recommendations specific to Northern Ireland are:

Skillset should enhance its presence and identity in Northern Ireland in response to the devolution of the UK learning and skills agenda.

Skillset, in partnership with the Sector Training Council (STC) - in practice both the NIFC and its Training Committee - should:

- carry out regular audits of the industry's development needs, ideally on an annual basis;
- ensure that the recommendations of the current sector reviews outlined above (traditional and new media) should be addressed by the industry and relevant bodies on an interdepartmental basis;
- secure training/development funding for the industry in Northern Ireland, at a financial level consistent with the rest of the UK;
- develop further an industry-specific careers advisory service for those entering and already in the industry, in line with **skillsformedia**;
- develop, with NIIMA and local industry partners, a training infrastructure for interactive media which is responsive to the industry's changing needs.

The STC should:

- work together with industry partners, to continue to promote professional qualifications and to secure access to assessment opportunities by 2002, resources permitting;
- review and develop its new entrants' training scheme, building on current good practice, by 2003;
- work with NIIMA to develop a 'Training for Trainers' programme to maximise the potential of skills present in Northern Ireland;
- continue to provide and further develop structured programmes addressing equal opportunity issues;
- continue to make contact with expatriate Northern Irish professionals working outside Northern Ireland to take advantage of their knowledge and contacts and to transfer knowledge and skills to the sector;
- continue to develop cross-border partnership opportunities with the Republic of Ireland.

DCAL should implement the pilot project for training in the Irish language as soon as is practicable.

D4 English Regions

The recommendations below aim to underpin a more robust regional strategy for industry development, with responsibility for strategy and provision clearly identified and separated. Recommendations applicable to the English Regions are:

In the light of the NTO Review, industries should:

- consider the role they wish the training consortia to play, and how they will fund their core activities in the regions;
- consider how best to separate each individual training consortium's strategic role from its operational training provision role;
- continue to develop a more strategic and consistent approach to representation on training consortia boards across the English regions, ensuring that new representatives are inducted and familiarised with corporate policy in relation to Skillset and the training consortia, and are aware of pan-regional as well as local issues.

Training consortia should ensure that they have adequate representation on their Boards from all the audio-visual sectors active in their regions, with particular reference to the radio, interactive media and computer games sectors.

Skillset and the training consortia should promote more vigorously to the Regional Development Agencies and the Local Learning and Skills Councils the economic importance, profile and needs of the sector.

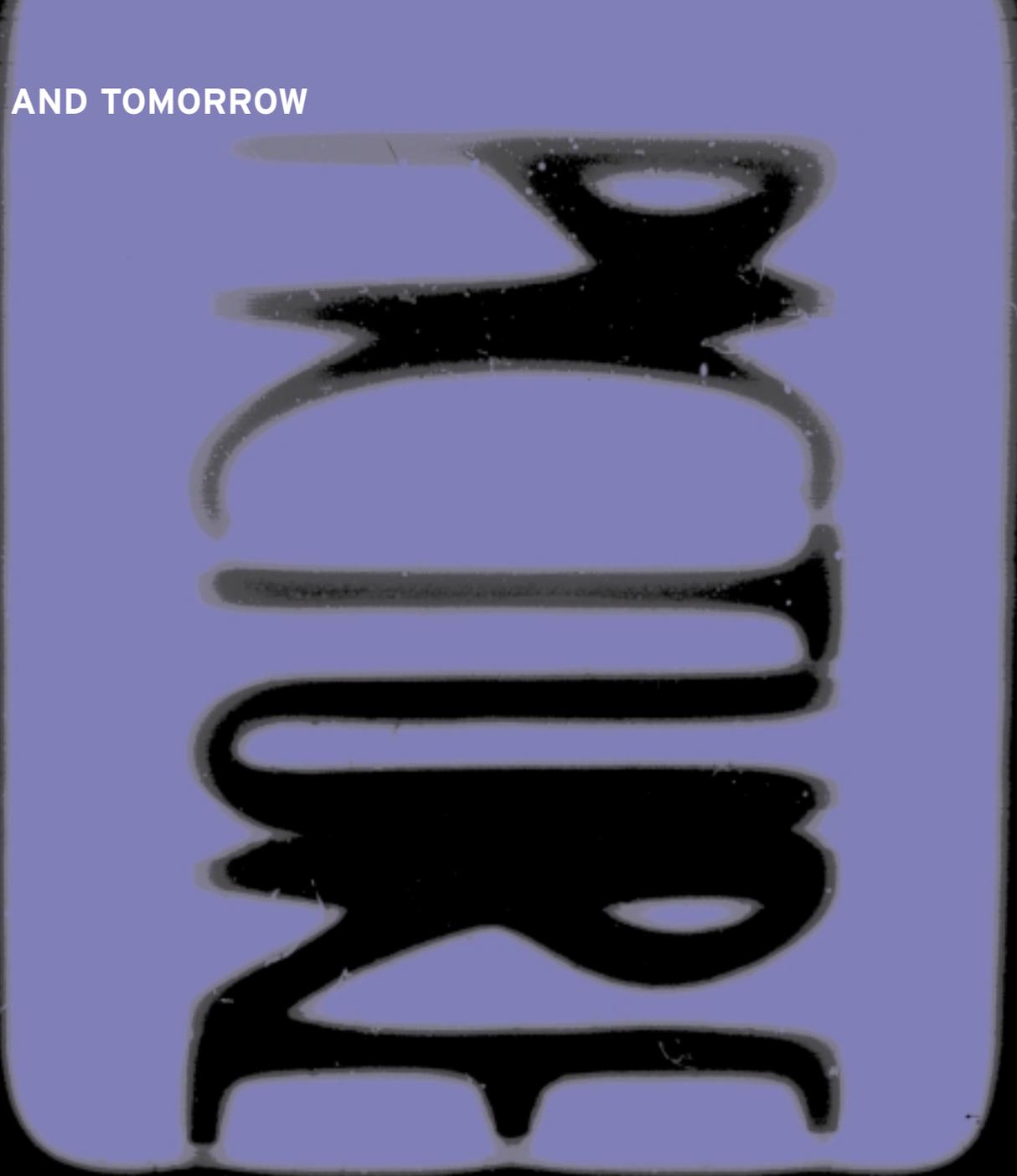
RDAs should provide core funding as a match for industry investment to enable Skillset and the training consortia to work effectively in the regions, with the LLSCs supporting the delivery of Workforce Development Plans.

Skillset should:

- revise the kitemarking system in a way that recognises the separate functions of strategy and delivery;
- work more closely with the consortia and regional bodies, in particular the RDAs, LLSCs and SBS, to provide better and more consistent information to local industry on sources of training, trainers and courses available across the English regions;
- continue to support and disseminate models of good practice throughout training consortia across the regions;
- develop a strategic approach to working with the regional and national LMI units and skills observatories.



SECTION B - NOW AND TOMORROW



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B1 THE FUTURE OF WORK

Introduction

The audio-visual industries are enjoying a period of unparalleled growth. Current estimates are that over 200,000 people overall now work in the industries. Employment across the sectors is now higher than in the water, gas and electricity industries combined.

The economic and employment opportunities for the UK of the success of these industries will only be realised if those planning education and training strategies are far-sighted enough to understand, anticipate and embrace the fast-changing demands for new skills. Human capital has the potential to give the British audio-visual industries a competitive edge in the global markets in which they will operate in the future.

This chapter gives an overview of the major drivers of change in the audio-visual industries, and of what is implied for their training and education needs. In the course of its work, AVITG has actively engaged with and participated in the work of the Directorate General Joint Research Centre (JRC) of the European Commission. In particular, the work conducted by the Institute of Prospective Technological Studies on 'Employment Outlook and Occupational Change in the Media Content Industries' has been extremely useful. This section draws heavily on the outcomes of that project.

Drivers of Change

The Knowledge Economy

The UK, along with most of the developed world, is in the throes of a major economic shift; its essence is the transition from a manufacturing to a knowledge-based economy. A number of factors underpin this change. Perhaps the most critical is the impact of new technologies, particularly the vast increase in the processing power of computers and the expansion of the networks that link them. As one group of analysts recently described the shift:³

'Some technological changes do not just amplify productivity in one sector but give all economic sectors new "tools". They open new possibilities for economic organisations across the board. They change what can be done across a very wide range of industries.'

This transition has wide implications across the whole global economy, presaging a decline in manufacturing sectors and huge growth in the communications, information and entertainment industries. It means significant changes in the skills required for success at all levels in the audio-visual industries.

³ Cohen, S, Delong, B, and Zysman, J: "Tools for Thought: What is New and Important About the "E-economy," (2000)

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Digitisation

Digitisation is widely regarded as the key. The opportunities it opens up are many and varied.

Large firms are moving into 'new media' production structures, necessary for multi-channel TV, and are employing increasing numbers of people with digital media skills. They must do this to survive. All media will be digital within 20 years.

At the same time, there has been a rapid growth in the numbers of start-ups and mergers of companies involved specifically in digital content creation. These start-ups, and the networks they generate, are characterised by decentralised informal structures and extremely flexible working patterns.

Perhaps the greatest challenge facing the audio-visual industries is their increasing interface with the IT and communications industries - specifically, how to integrate the creation of content with its distribution. The readiness to adapt, particularly to ensure an appropriately skilled workforce, will determine the UK's ability to take advantage of the opportunities presented by technological development and to compete.

Demography

By 2007, for the first time, the proportion of 55 - 65 year-olds in the UK will outnumber the proportion of 16 - 25 year-olds. The audio-visual industries' traditional reliance on an extremely young workforce (particularly in interactive media) may be challenged by a shortage of young people coming through the education system who meet their demands. At the same time there is a risk that older workers, as now, will find it difficult to obtain new work because of perceptions of outdated qualifications and skills.

The implications are clear. The audio-visual industries cannot afford to waste the potential skills of their existing workforce. Current skills will need to be updated regularly. New skills will need to be learned throughout a career.

Another phenomenon is the increasing number of dual-income and single-person households. This creates time pressure and conflicts between work and domestic responsibilities. There will also be increased flexibility of employment and working patterns - up to now a mixed blessing for both employers and employees.

These factors also have implications for the demand for content. In particular, there is likely to be a move away from conventional concepts of peak television viewing times and increasing demand for transmission around the clock. Distinctions between work time and leisure time will be less easy to make in the future than now.

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JRC Conclusions

The JRC has summarised the main drivers of change as follows:⁴

- Industrial restructuring around the search for economies of scope and scale related to features such as globalisation, industry concentration and mergers, liberalisation and convergence;
- Cost reduction of the production process owing to digitisation;
- Technological change reducing entry costs for net presence, thereby leading to opportunities for new media, especially Internet based; the emergence of online versions of new and old media linking communities; new forms of media based on WAP technology and aimed at fast and short information delivery; the creation of new firms and occupations (see later);
- New types of content creation across a wide variety of sectors;
- Changes in the supply of new entrants to the labour market and in patterns of demand, owing to demographic changes, greater differentiation of tastes and changing lifestyles, such as the growth of single-person households.

Implications for Use of Skills

The development of multiple digital delivery platforms (digital TV, ADSL, the Internet) will have major implications for the production process and its funding. Skill areas for which demand is likely to increase rapidly are those related to coordinating, producing and adapting content for multiplatform distribution, or for different outlets. Knowledge of intellectual property law will become increasingly critical to the production process.

Government's stated intention to see Britain as a leader in the switch from analogue to digital broadcasting will stimulate a demand for skilled aerial installers.

It is also likely that, although there will almost certainly be a major increase in the delivery of low-budget and niche programming, there will also be a continuing and possibly increasing demand for high-end content.

In addition, the delivery of content through high-definition digital platforms may well enhance and reaffirm some traditional job roles where specific skills are required, as production standards in some areas are pushed higher.

The transition from functional organisational structures to more flexible working patterns, already well under way in the audio-visual industries, seems set to accelerate. There are essentially two factors in play. One is the adaptability, achieved through flexible arrangements such as temporary contracts and part-time working, whereby employers seek to enhance efficiency in their deployment of workers and to increase organisational adaptability. The other is the functional flexibility of utilising workers who are both multiskilled and willing to take on diverse tasks.

⁴ Ducatel, K, Burgelman, J-C, and Bogdanowicz, M: 'Employment Outlook and Occupational Change in the Media Content Industries' - 2000-2005 (2000)

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In one important sense these two dimensions of flexibility are incompatible. Functional flexibility demands ever-increasing levels of skill and versatility (thereby increasing training needs), whereas flexibility of employment is creating a culture of diffusion of responsibility for training, particularly with the increase in freelance working.

To put it another way, there is a potential contradiction between companies' long-term investment in human capital and their need for adaptability in the face of rapid technological change. Government, employers and unions have to understand this.

Increasing globalisation of the economy will inevitably lead to increased competition, particularly in the audio-visual industries. This implies increasing migration of labour. It also means that the technological developments driving the industry forward facilitate new patterns of labour use, including remote working over distances of thousands of miles. The supply of suitably qualified and skilled people will inevitably prove to be the key to who flourishes in this new environment.

Future Generic Skills

The Institute for Employment Research⁵ has estimated that 90% of all newly created jobs in the UK require people of graduate level. Manual employment already accounts for less than 13% of employment in the UK. At the very least, all information workers will need high levels of ability with word processors, databases, presentation tools, browsers and image manipulation tools. These will be among the generic skills required of all information workers, from chief executives to administrators.

Future Media Occupations and Skills

The defining competence of the digital era will be content mastery. Essentially, as the value of content grows because of the increase in converging distribution channels, there will be greater scope for the reuse of creative assets. This makes the role of content management all-important.

New technologies increase the potential for plagiarism, copying and distributing content illegally, thus enhancing the role of those whose job is protecting intellectual property rights. In addition, convergence will increase the value of brands as well as content. Brand management will assume increased importance in the digital age.

Technological changes have already created a raft of new occupations within large 'traditional' companies and small specialist companies alike. In the area of content production a specific feature is the interdisciplinary, team-based nature of much work, often requiring a combination of technical, creative and business skills. This cuts across traditional professional and training demarcation lines. The Organisation for Economic Cooperation and

⁵ Review of the Economy and Employment
1998/1999: Labour Market Assessment.
IER (1999)

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Development (OECD)'s *Skills and Training Scoreboard* (1999) provides considerable evidence of these trends, drawing from studies of labour market developments in digital media.

Ducatel et al (2000)⁶ have compiled an inventory of occupations in new media from a range of sources, shown in **Box 1**. **Box 2** shows the occupational groups, roles and job titles for new media developed for the AVITG's own census. There is broad consistency between the two approaches. Although at this stage it is impossible to quantify the significance of these new occupational groups, the 2000 Census represents the first attempt to estimate the current levels of employment in the roles identified. It will provide a benchmark upon which estimates of growth may be based and against which future trends may be plotted.

Marot and Levesque (1999)⁷ have attempted to identify and grade new competency requirements in likely levels of importance for those in existing roles, based on interviews with senior figures in the French media industries (**Figure 1**). It is clear from this that previously distinct job roles are converging and that workers are expected to master a much wider range of tasks, both within their core competencies and in their subsidiary skill repertoires. Critically, Marot and Levesque anticipate that all roles will have at least some need to understand and use network-based tools (the final column in the chart) - hitherto the preserve of the network technician.

Many of these new jobs require hybrid skills whose development is not currently accommodated by higher and further education provision. However, bearing in mind the potentially huge skills gaps forecast in core ICT roles (forecast by some sources⁸ to rise to up to 100,000 by 2002), it will not be sufficient for companies to wait for education and training provision to catch up with demand.

In any case, these new hybrid jobs will require a combination of analytical rigour and the ability to work in teams. Many organisations are now looking away from computer science graduates and recruiting graduates in related disciplines, such as mathematics, for training in the requisite technical areas. According to Ducatel (1999), for example, mathematics is now the preferred background for games designers.

This trend towards the development of technical skills by non-specialist graduates will need to continue if the industry's skills needs are to be met. In future, it will not simply be a matter of training more computer scientists, but of harnessing the skills of the many highly qualified, numerate and technically competent people in the workforce who have drifted into non-technical professions.

⁶ Ducatel, K and Burgelman, J-C: 'The Futures Project Employment Map' (1999).

⁷ Marot, J-C and Levesque, D: 'Audiovisual: Nouveaux Metiers? Nouvelles Formations?' (1999).

⁸ Spectrum Strategy Consultants, (1999).

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Box 1: New media job roles (JRC, 1999)

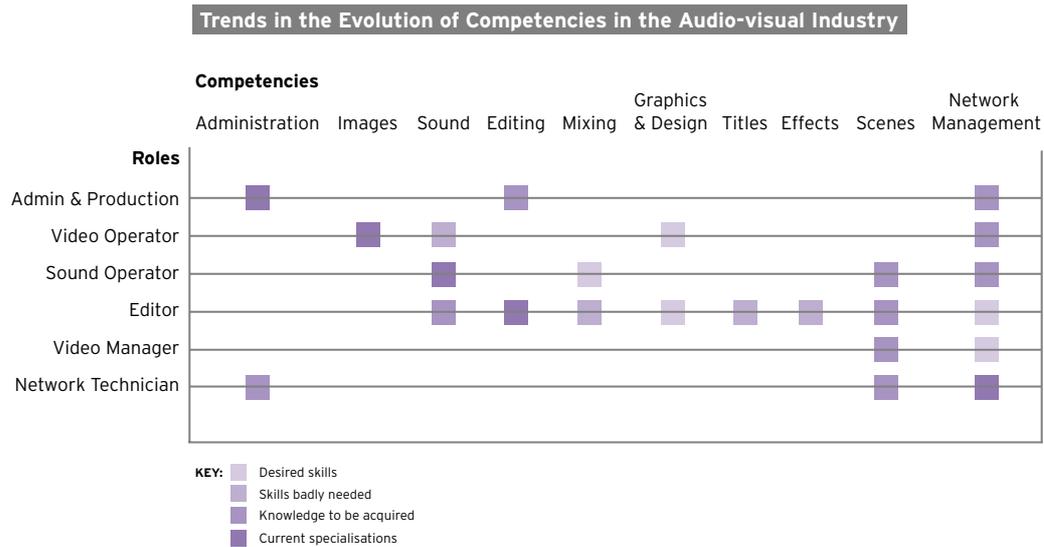
Occupation	Definition
Technical	
Internet architect	Webmaster with 'muscle' able to do relational database design
Product manager	Day-to-day management of media content and showcases (e.g. websites)
Core programmers	Use of 'lower-level' but extensive skills in C++, Windows NT, Unix for programming multimedia content
Network security	Protecting services and sites, transactions and customers
Creative	
Visual development	Conceptualising scenes, artwork, production of 2D and 3D images, animation
Storyboard artist	Conversion of scripts into storyboard, plans shooting schedule, ensures continuity
Layout artist	Stages scenes and camera positions, draws backgrounds and animations
Painters and background animation	Produces designs based on layouts
Traditional animation and character effects	Bringing characterisations to life
Computer artist	Producing 3D images from software, choreography of objects
Technical artists	E.g. physical lighting specialists or shader writers (programmers to make computer-generated films)
	(Other creative occupations include: graphic designers, interactive writers, instructional designers, game designers, video producers, sound designers and web designers)
Content creation	
Copywriters for web advertising	Journalists producing 'infomercials', writing high-impact copy for advertising, news, web resources
Public relations	Knowing client needs, analysing the relationships between media capabilities and know-how
Web journalists	Providing 24-hour updates of news coverage, using networked resources rather than legwork, operating from virtual press agencies
Portal compilers	Providing content and packaging for portals
Post-production workers (e.g. in music industry)	Editing and selecting sound bites, integrating with video clips
Business	
E-commerce analysts	The new media are related to new business models that require new approaches to marketing and to conducting business
Specialist recruitment and staffing agents	In an area of fast change, with the demand for hybrid skills and growing use of contract or contingent workers, finding the right people increases in importance
Producers and technical and/or creative directors	Core team workers able to assemble production teams and to manage the production process
Communications law specialists	Dealing with protection of intellectual property assets, guarding against prosecution for non-compliance with the emerging privacy laws, data protection, making sure that taxation is properly handled
Media planners	Packaging and sale of media space, planning media exposure for clients - this job gets more complex with media convergence
Customer service call centre operators	Dealing with increasingly online client relations

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Box 2: Roles and example job titles in New Media from the AVITG Census (May 2000)

Role	Example Job Titles
Content	Copywriter, Web editor, Asset Researcher
Creative	Creative Director, Graphic Designer, Interface Designer
Planning, Pre-production	Consultant, Strategist, Producer, Information Designer/Architect, Project Manager
Production	Programmer, Site-builder, Production Assistant, New Media Developer, Animator, Sound/Video Editor, Systems Integrator
Technical Design	Technical Director, Database Designer, Interaction Designer

Figure 1:



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Conclusions

- Convergence implies the coming together of previously separate industries, applications and platforms. It needs to be reflected in the ways cross-industry monitoring, training and education are managed. Too many institutional structures reflect the needs of the industries before the age of convergence.
- The next 10 years are likely to see a major trend towards increased demand for more highly skilled people across all sectors, especially people with ICT skills. The most immediate and damaging gap is likely to be a shortage of core ICT workers.
- The tendency for skills to be considered obsolete at an early stage must be overcome. Older workers have a key role to play in the industries' growth. An increased emphasis on lifelong learning (or, at the very least, medium-term career planning) will help more mature workers to remain active in key technical roles for longer.
- The audio-visual industries are likely to experience an increasing demand for hybrid skills, multitasking, working in teams and managing networks. Technical skills in the workplace will increasingly need to be complemented by other key skills.
- The switch to digital broadcasting will present new challenges resulting in new skills requirements and jobs.

B2 INVESTMENT IN TRAINING

Introduction

The Labour Government of 1997 put education and training policies at the heart of its agenda. DfEE's White Paper, *Learning to Succeed* (2000), tackled a number of fundamental weaknesses in Britain's level of skills and productivity performance. It was based on comprehensive, authoritative reports by the National Skills Task Force and Welsh Skills Task Force. The Government described its response to this proposal as 'a strategy for achieving a high-skills value-added economy'. Similar reports have been produced in Scotland and Northern Ireland, leading to similar conclusions.

The four key elements of this strategy are:

- strengthening the links between what people learn and the jobs they will do;
- creating excellence in vocational learning so that everyone can achieve their potential;
- reaching out with basic skills training to those the system failed first time within a flexible system of lifelong learning for all;
- working with employers to give everyone the chance to boost their skills and productivity.⁹

Members of AVITG found this framework helpful in their discussions. In many areas, such as the need for excellence in vocational learning, the clear articulation of a policy goal sparked a debate from which clear recommendations for action have followed (**Section C3**).

AVITG also believes that the audio-visual industries of the future will benefit from the availability of learning opportunities throughout working lives, and the Skills Passport proposal (**Section C4**) takes this forward.

The Government's expectation is that the stakeholders in an industry - employers, individuals, trade unions, with and through their National Training Organisation - will be able to influence education and training through the new Learning and Skills Councils, the Regional Development Agencies, Education and Learning Wales (*Dysgu ac Addysgu Cymru*), the Scottish Enterprise Companies, Local Enterprise Companies and the Training and Education Authority. Industry stakeholders are expected to match public investment with private investment.

The Skills Agenda sees a future in which government, business and individuals can together 'achieve the goal of a highly skilled, inclusive economy'¹⁰.

Meanwhile, the current weaknesses in Britain's performance need to be addressed.

⁹ 'Opportunity and Skills in the Knowledge-Driven Economy: A Final Statement on the work of the National Skills Task Force from the Secretary of State for Education and Employment'. DfEE, (2001).

¹⁰ 'Towards a National Skills Agenda' Reports of the Skills Task Force (DfEE), 1998-2000. 'Employer Provided Training: Key Facts 2000'. DfEE, (2000).

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The reports of the National Skills Task Force set out in detail why a highly skilled labour force is a core component of a high value-added economy. Lack of adequate training is believed to be a major reason why British workers are less productive than those in Germany, France and the US. According to a recent survey¹¹, 32% of British companies provide no training of any kind, despite extensive evidence that investment in training has a measurable payback.

None of the evidence submitted to AVITG suggested that the audio-visual industries vary significantly from other sectors. Take-up of the Investors in People (IiP) programme is one measure. To date, very few companies in our industries have chosen to achieve this standard, which is a visible way of gaining recognition for good practice in improving business performance by developing people effectively in the workplace. Forty companies, mainly in cinema exhibition, have now received IiP status, including Channel 4 and S4C, but take-up in sectors characterised by Small and Medium Sized Enterprises (SMEs) is low.

The background to current industry training provision is described in the sector reports (**Appendix B**). Essentially, many of the larger television licensed broadcasting companies have a strong training tradition that has evolved from their public service background, but smaller companies in sectors other than broadcasting are often too small to maintain an in-house training facility and too busy to get involved with external trainers.

For the most part, shortage of evidence about both public and industry investment makes all conclusions tentative. Improving the supply of information about training and education for the audio-visual industries has been a priority for AVITG from the outset.

Industry Investment

AVITG was charged with identifying and quantifying current levels of investment by employers, Government and individuals, and with relating future spend to the needs of industry sectors. In this chapter, we look at what we know about training investments made by employers, Government and individuals.

In **Section B3**, we look in more detail at the nature of provision, from school delivery to continuing professional development (CPD) programmes.

The first industry Census in May 2000 was a major step forward in gathering essential data and information about the audio-visual industries. The results give a better picture of the make-up of the workforce than had existed previously. However, it was not possible to extend the Census to provide an authoritative report on levels of training provision; nor has it been possible yet to obtain reliable data on the overall training investment in different sectors.

Some companies did describe their training activities to AVITG, but even in the case of the licensed broadcasters there was no agreed methodology for

¹¹ 'Employer Provided Training: Key Facts 2000'. DfEE, (2000).

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measuring investment in on-the job and off-the-job training. The DfEE/DTI People Skills Scoreboard Scheme – piloted by Skillset in 1999 – also generated a poor response. Thus comparisons between the BBC, Channel 4, Channel 5 and the ITV companies tend to be subjective, rather than evidential and objective.

In other sectors there is much less to go on. AVITG's recommendations start with the long-term need to improve the overall supply of accessible and authoritative information across all audio-visual industries.

AVITG circulated a questionnaire to companies about commitment to in-house and external training and education as part of a strategy to fill the gap in the short term.¹² A limited number of responses were generated. The results confirmed the findings of a recent BBC internal survey. This indicated that a third of companies in key sectors such as television and radio carry out no training whatsoever:

- Four out of five companies had used freelancers during the previous months;
- Nine out of ten felt freelancers needed formal training;
- Seven out of ten thought freelancers should pay for such training themselves;
- Six out of ten thought the responsibility for providing training lay with industry bodies, although it is unclear whether they saw themselves or the public purse as providing the funding;
- One in three were prepared to contribute directly to an external training budget.

The company information in the subsequent chapters in this section has not been subjected to any form of external validation or audit.

The need for this information and for recommendations to support the collection of investment-related information are discussed in **Sections C1** and **C10**.

Public Sector Broadcasters

The BBC is the world's largest broadcasting trainer. In 1999, it spent over £30 million on training its own staff. In addition, it carried out £5 million of training as a supplier to other organisations and individuals. It employs 250 staff who work exclusively on training or training-related activities, and it trains approximately 25,000 people a year. Four television and seven radio studios are dedicated to training.

In addition, in 2000 the BBC contributed £400,000 to the National Film and Television School (NFTS), £100,000 to the Freelance Training Fund (FTF), £250,000 to Skillset and £47,000 to other external training centres.

¹² 'Audit of Investment in Training and Education'. Skillset, (2000).

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In most areas the BBC has the know-how to act as the bedrock of industry training, simply by opening its training provision to non-employees. Many, but not all, BBC training courses are already open to non-BBC personnel. How freelancers can afford to access these opportunities is a question that has not yet been coherently addressed within the industries as a whole.

During AVITG discussions, the BBC agreed to extend its provision in a number of ways, outlined in **Section C8**. The BBC has also indicated its commitment to :

- extending its partnership work with FE/HE institutions to support their courses and to help them align their output to the needs of the industry in line with AVITG recommendations;
- continuing to seek collaboration with manufacturers to improve technical training provision;
- continuing to invest in training facilities to provide trainers with the most up-to-date and relevant experience;
- extending its range of secondment opportunities, supporting flexible placements across the BBC and in other organisations;
- continuing to invest in skills development partnerships with government initiatives, broadcast sector schemes, voluntary organisations and education networks, with the aim of developing skills in the diverse communities it serves and of growing skills for the audio-visual industries across those communities.

Channel 4 is growing its development of talent by aiming to achieve the highest pounds-per-head investment in its own staff within the sector. The channel, which depends on independent production companies for its programme supply, spent over £4.5 million on training in 2000. It contributed £214,000 to NFTS, £225,000 to Skillset and £400,000 to the FTF. A number of the channel's commissioning departments played a role in initiating or participating in various training and development schemes across the industry. There are a wide range of technical and personal development initiatives available within Channel 4, and these will increase sharply in 2002. The current development solutions have played a significant part in Channel 4 being recognised as an Investor in People. Recent activities include:

- introducing a programme to develop a greater awareness and understanding of disability, particularly for programme support and commissioning;
- developing wider access to learning opportunities through an e-learning site specific to Channel 4 employees;
- providing a focused personal development service to employees through introducing highly effective coaching and mentoring support scheme;

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- continuing to develop the breadth of management capability by providing an increasing range of management programmes.

S4C invested £564,000 in in-house and external training in 2000. Of this, £450,000 was granted to external providers, with the largest share going to Cyfle, the Welsh industry-based training provider, and £40,000 to the NFTS.

The Gaelic Broadcast Committee invested £225,000 of its annual budget of £8.5 million into the Gaelic Training Trust, short courses and scholarships in 2000. On the basis of the figures provided by the other broadcasters, this is considerably the highest percentage spend of a public sector budget to be invested in training and education.

ITV and Channel 5

The ITV companies, now dominated by Carlton and Granada, spent over £8.3 million on training in 2000. Of this, nearly £2 million took the form of grants. Specific grants were £255,000 to the NFTS, £382,500 to the FTF, £178,500 to Skillset and £278,500 to other educational establishments.

This year, the ITV companies have increased both their core funding of Skillset and their project funding of the FTF. They have played a major role in developing training and education for the sector in the nations and regions, as described in **Section D**. They have also actively engaged with the task of pursuing their commitment to increasing the diversity of people who work on and off screen.

In addition to training their own staff ITV companies provided over 9,000 days of off-the-job training to over 3,000 freelance or contract workers in 2000. ITV also took on nearly 300 entrants into structured training schemes across a range of production and support roles.

In addition to formal training, ITV's large in-house production operations present many additional opportunities for staff development.

Channel 5 doubled the proportion of its revenue spent on training in 2000 from 0.3% to 0.6% and contributed £94,000 to the NFTS and £25,000 to Skillset.

As a member of the Cultural Diversity Network, Channel 5 has initiated the ethnic graduate trainee scheme and in the autumn of 2001 is planning to introduce a work placement programme for those with disabilities. The channel also runs training courses for production companies on clearance and compliance issues.

Other Television Broadcasters

BSkyB spent £6.6 million on training and developing its 13,000 staff in 2000, including those who work in call centres.

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Current training provision includes initiatives such as an executive development programme, designed to provide a learning experience for senior managers with the potential for further development within the organisation. The programme enables managers to maximise their contribution to the business and enables the facilitation of team working across the management group.

BSkyB provides 'technical' and vocational training in the areas of editing, VTR, graphic presentation, broadcast engineering, software development and web packages. Where appropriate, the company invests in sending individuals to open programmes and recognised centres of excellence.

The company is also continuing to develop its relationship with the NFTS and other colleges and universities across the UK.

There are other large cable and satellite broadcasters, such as NTL, Telewest and Discovery, but no statistics are yet available on the levels of investment made by these companies in training their own staff.

Neither Skillset nor FTF receives any contribution from the companies in this sub-section.

Commercial Radio

There are no overall sector statistics available for commercial radio, nor is there any requirement by the Radio Authority for local licence holders to outline their plans for training or to report on their activity in this area. As radio is now the second largest single employing sector in the audio-visual industries, this leaves a significant gap in the overall knowledge and understanding of provision and investment.

The GWR group, the commercial industry's biggest single employer, spends more than £1 million a year on training its staff, and supports new entrants by running free training weekends for student broadcasters and sponsoring the British Journalism Training Council (BJTC) Awards.

Two regional training consortia receive some financial support from commercial radio companies, but not Skillset. That said, the Commercial Radio Companies Association (CRCA) played a key role in ensuring a good level of response to the Skillset Census and Radio survey.

Independent Producers

Producer's Alliance for Cinema and Television (PACT) has provided an overview of strategic training and investment in the independent production sector where it operates the Independent Production Training Fund (IPTF) with the support of the main broadcasters.

Since 1993, a voluntary levy of 0.25% of the total cost of a production, up to a

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ceiling of £6,250, has been applied and is taken from the producer's fee or profit margin. To collect the levy effectively, PACT needs information and support from broadcasters. Here practice varies.

Channel 4 provides both detailed information to IPTF and a collecting service on PACT's behalf. Channel 5 provides information about productions commissioned but no proactive support for the levy. There are different approaches in ITV, partly because independent productions are commissioned both by individual licensees and by the Network Centre. The BBC collects the levy but forwards no information about production companies that are contributing. There are as yet no mechanisms in place for collecting the levy from cable and satellite broadcasters, although Discovery Network Europe has just agreed to work with the IPTF on collecting the levy. Consistent support from the broadcasters is vital to the success of the fund. PACT and the IPTF stress the inadequacy of the available statistics on independent production and the make-up of payments remitted to it.

The IPTF's contributions to the FTF, Skillset and the NFTS have increased steadily and now total around £475,000. IPTF also encourages the continuing professional development of the creative and entrepreneurial producers who run independent production companies, by funding business skills development programmes for small-company employers and owners.

In Wales, independent producers contribute to Cyfle, the national training provider. S4C provides a central administration service and pays the levy direct to Cyfle. The contribution usually equates to 5% of the production profit. In 2000 this amounted to £81,000. In recent years S4C has developed a proactive and constructive approach to encouraging training commitment and staff development within the independent production sector.

Film

Until 1999, the IPTF also covered feature film production, but the collection of contributions from this sector was never fully effective.

However, as a result of the Government-sponsored Film Policy Review¹³ and a high level of ministerial focus, the Skills Investment Fund (SIF) was introduced. This is a voluntary levy of 0.5% of production budgets, with a ceiling of £39,500, managed by Skillset. To date it has collected £1,095,000 from 60 productions.

SIF was seen as part of a 'something for something' deal in which producers have access to generous tax breaks. Tax breaks were recently extended for 3 years.

SIF's performance during its initial 2-year trial period will be reviewed, at the end of 2001, led by the DCMS.

¹³ 'A Bigger Picture' DCMS, (1998)

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It is worth noting that television producers, including the production arms of major broadcasting companies, have also been able to make use of the tax breaks. This is appropriate, given that high-end drama production in television is dependent on the same pool of highly skilled freelance talent as are British Film producers. AVITG believes it would also be appropriate for the end-of-year review to consider whether these productions should be asked to contribute to SIF, if the producing companies are not already supporting industry-wide training.

Other Sectors

Corporate and commercials production companies usually depend on the same skills and the same people as broadcasters. Both sectors claim annual production investment in excess of £500 million, only slightly less than the feature film industry. Both sectors rely heavily on the availability of a trained freelance workforce. Neither sector invests to any degree in industry-wide training activities.

Companies in digital media, post-production and the wider facilities sectors are known to have developed in-company training approaches for new entrants and staff. There may be ways in which these approaches could be coordinated and supported by public investment through Modern and Graduate Apprenticeship schemes and supporting closer links with FE/HE provision.

Where a sector is made up of small companies and where there is no trade association prepared to consider training issues, little is known about the extent of private investment in training and education.

Trade Associations

The attitudes of trade associations and professional bodies have an important part to play in stimulating training activity. Their principal activities include:

- representing individual sectors of industry through the political process, the media and other channels of influence, contributing knowledge, expertise and broadly based views;
- promoting competitiveness through research, innovation and supply chain initiatives, support for training and skills development and encouragement of technical, service and quality standards;
- developing market opportunities through marketing and commercial strategies as well as promotional, trade shows and export activities.

PACT and the Motion Picture Association (MPA) play an active role in championing training to independent producers for film and television, as does the Association of Studio and Production Equipment Companies (ASPEC) for the studio and facilities hire companies. The International Visual Communication Association (IVCA) supports training initiatives in companies in the business-to-

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business sector. The Advertising Producers Association (APA) does not participate in any of Skillset's activities, but is active in FT2 (Film and Television Freelance Training).

Investment by Governments

Governments across the UK have placed a high priority on learning and skills and much thought and time has been devoted to rethinking the structures for delivering support in this area. In addition, public investment has been and will be made available to support the achievement of challenging UK wide targets. One of those targets is to work with and encourage employers within sectors to build on and improve their current levels of commitment.

One way of incentivising this is to maximise public/private investment through partnership between governments and employers. In 2000, AVITG tried to ascertain, by contacting all relevant government departments, how much public investment was made in vocational training and education for the audio visual industries. Responses were received from England and Scotland, but with incomplete data. In England, the £5 billion plus budgets being raised by the then Training & Enterprise Councils were not tracked on a sectoral basis so it was impossible to "identify expenditure for a specific sector". It is vital that Governments, and their public agencies, are able to account for sectoral investment across FE/HE and post-16 provision. The establishment of new structures and systems for post-16 education and training provides an opportunity to achieve this.

Interest and support by Governments for industry training are major factors in developing strategy.

For example, successive governments have sought to stimulate the British film industry through tax breaks, lottery investment and high-level access to government decision-makers. As a result, the industry is well aware that a 'benefit' such as a tax break may be accompanied by a 'responsibility'.

One outcome of government engagement has been the SIF, the voluntary levy described earlier in this section. The mechanism of the fund was determined by the film industry itself, through a cross-industry working party, but the fund would not have been created without the active involvement of government in the sector's workings.

Elsewhere the re-launch of the British Television Distributors' Association (BTDA) was partly triggered by the enthusiasm of the DCMS to grow the competitiveness of British television programmes overseas. Computer games companies have recently formed TIGA, again with support and encouragement from Government.

The White Paper, *A New Future for Communications* (2000) (2000) was jointly

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produced by DTI and DCMS. It proposed a new regulator, OFCOM, to represent the public interest in the future development of the industries.

In particular, AVITG notes Section 5.6.3, which sets out the likely requirements of the first tier of industry regulation:

‘There is a case for OFCOM to have a general responsibility to promote support for training across the wider broadcasting industry, including powers to research and monitor performance. This would be underpinned by licence requirements, as deemed appropriate by OFCOM, for licences to set out plans in this area...We would expect OFCOM to work with Skillset and industry in progressing this, taking into account the recommendations of the Audio Visual Industries Training Group.’¹⁴

Section C10 recommends some specific approaches to progressing the industries’ dialogue with OFCOM, and welcomes the proposal that support for education and training should fall in the first tier of regulation.

Apart from the schemes described in **Section B3**, direct government investment in industry training is the exception.

The NFTS depends on a grant from DCMS to support its unique role as a trainer of high-end skills for the film and television sectors. The NFTS’s position within the sectors it serves has been something of an anomaly for many years, a position not made easier by the impact of devolution. However, the NFTS currently plays a valuable training role. Governments and industry should ensure that the NFTS and other centres of excellence are adequately funded to achieve the outcomes expected of them.

Another source of investment from Governments and their agencies has been support from national and regional economic development agencies for specific sectoral initiatives. Skillstrain, the training consortium in the south-east, has benefited from investment from the South East Economic Development Agency (SEEDA). Similarly, media training in Scotland has been given a high priority by Scottish Enterprise.

Education and training have been devolved responsibilities since 1999. This means that there may be differences between nations and regions both in the nature of the strategies to be adopted and in the means of implementation. This has important implications for the relationship of Skillset with its consortia partners. The issues raised by devolution are addressed in **Section C9** and **Section D** of this report.

¹⁴ A New Future for Communications’ White Paper, DTI, DCMS, (2001).

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Skillset, and the Consortia Network linked to Skillset, have no guarantee of continued support. However, later in **Section C9**, AVITG argues that Skillset and its partners should receive core funding from national and regional bodies to enable their strategic roles to be performed adequately.

The major role of Government is to enable employers and employees directly to help themselves. Supporting individual learning is, rightly, central to this strategy.

Individual investment in training

Historically, the practice in industry sectors has been for employers to invest in training their own staff only. Freelancers have been expected to come to the job with the required skills.

Now, over 50% of the workforce in the audio-visual industries is freelance. Certain sectors, such as feature films and commercials, have a much higher reliance on freelance skills than others (e.g. radio).

Some companies will include freelancers in their own training schemes, but using mechanisms such as IPTF and SIF is increasingly common among smaller companies. However, even where good training opportunities exist, individuals already working in the industry are usually expected to pay a proportion of the costs of the training they receive.

A recent estimate¹⁵ suggested that around one-sixth of all investment in training is made directly by individuals. There are real benefits to this:

- A sense of ownership and responsibility for training;
- Awareness of the need to make informed decisions about the relevance of the investment.

Skillset's labour market research across the audio-visual industries has consistently shown that freelancers understand the need to invest in training. However, the same research highlights that it is difficult to cope with both the cost of training and the loss of earnings.

The FTF experience is that, when they are already economically active in the industry, individuals are usually prepared to pay half the costs of a course, with the other half provided by an FTF subsidy. For FTF courses, demand exceeds supply.

Government encouragement of a culture of lifelong learning has made it easier for individuals to afford their share of the costs. Individual Learning Accounts (ILAs) are available to both freelance and full-time staff. Account holders who sign up for eligible courses receive a contribution towards their costs. Employers can claim tax and national insurance relief on contributions they make to ILAs. ILAs have the potential to contribute towards skills needs in training for the audio-visual industries.

15 Education into Employability: 'The Role of DfEE in the Economy' Speech by David Blunkett at the Institute of Economic Affairs, (24 January 2001).

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Career Development Loans are available for vocational training courses lasting up to 3 years, and there are other schemes across the UK aimed at providing support for unemployed adults, with the capacity to provide much needed funding for individuals.

These schemes, supporting individual learners, will prove an increasingly important part of the training jigsaw.

B3 POST-16 EDUCATION AND TRAINING: CURRENT PROVISION

Questions of Definition

Society's major investment in training and education for the audio-visual industries is made in the formal education sector. AVITG believes this investment, at both the pre-16 and the post-16 stages, has a vital role to play in meeting industry needs. But here, as elsewhere, finding out what happens now has not been easy.

A major task for the AVITG has been to identify training and vocational education supply. Research in this area has been at an initial 'scoping' level and needs to be supported by further detailed analysis. Recommendations regarding further research can be found in **Section C1**.

One of the major difficulties is the issue of definition. Education, vocational education, training, skill development and continuing professional development are terms with which most people are broadly familiar. Until recently they could comfortably be aligned to different types of 'provider': schools and universities provided education; further education's task was to develop skills and prepare for specific employment; it was the role of industry to train.

Once you begin to examine what is happening in any detail, the issues are less clear-cut. This applies particularly to education and training for the audio-visual industries.

Media Education: Theory and Practice

The rapid growth of the audio-visual industries has created a demand for the further and higher education sectors to place a greater emphasis on industry needs. Courses with an emphasis on media practice have been introduced to satisfy these needs.

At the same time, there has been a massive expansion in demand-led FE/HE, in which media and communication studies have proved popular areas of study. Research and scholarship, based on the media's role in society, have flourished.

During the AVITG consultation process, many correspondents were critical of the growth of media and communications studies on the grounds that these subjects are not a preparation for working in the media. This is a little like complaining that the study of English Literature is not a preparation for being a novelist or a poet.

The confusion between the academic study of media in society and vocational education for the media industries needs to be cleared up.

Creative and cultural education, of which media studies is a part, are important components of general education.

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They are not the same as media training, although training without reference to its purpose is less than adequate.

In schools, enabling children to develop their creative skills and their understanding of culture provides them with a wider range of opportunities. People who generate bright ideas are at the heart of every sector of the creative industries.

As the Film Education Working Group put it:

'Education policy-makers should recognise that critical and creative moving image skills will be a key element of literacy in the 21st century.'

AVITG warmly welcomes the increased emphasis in the pre-16 education system on enabling individuals to develop their own creativity and to recognise the part creative people play in our society.

The growth of media and communication studies in higher education provoked more discussion. It has been suggested that:

- too many undergraduates in HE are studying media;
- media studies graduates do not find work;
- media courses make false promises of employment.

None of the criticisms stand up to scrutiny.

The most recent figures from the Higher Education Statistics Agency (HESA) show that in 1998/99 4554 students were studying communications studies, 8363 media studies and 2735 journalism - approximately 5000 students a year across a diverse range of courses. These subjects represent just some of the many courses with relevance to the industry. The total number of degree courses (with direct reference to the sector) are in the region of 600-700. These courses are not differentiated by type (e.g. practice orientated or purely theoretical).

In terms of employability, the report of the Association of Graduate Careers Advisory Services in January 2001 showed that 76% of graduates in media studies found work within 6 months of graduation, against 69% of all graduates.

The issue of a false prospectus is more difficult. There is intense competition for students within the HE sector, and there can be no question that the word 'media' is more seductive than the word 'communications'. That said, AVITG saw no evidence in prospectuses or marketing material of an intention to mislead. Both industry and HE share the belief that course information and marketing should accurately reflect course content and learning outcomes.

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What is clear is that the distinction between vocational education for the audio-visual industries and media studies needs to be made more clearly. Information about industry sectors to potential entrants is currently inadequate. Schoolteachers, careers advisers, parents and students find it difficult to distinguish between courses of general academic study and courses that include media practice training within their remit. This is an area where industry sectors can play a major part in improving the two-way flow of information, a theme which is explored later in many of the sector reports and is addressed by recommendations in **Section C1**.

AVITG's primary concern has been to ensure courses that include training in media practice within their remit are relevant and effective gateways to industry sectors. A wide range of such courses have been introduced in recent years. These are key to supplying several industry sectors with the multi-skilled workforce they need.

Building closer links between education providers and employers is not yet recognised as a necessity. It should be.

Post-16 Education and Training Strategy

The post-16 education and training sector is going through a period of significant expansion. There has been an increased range of vocational provision in schools, FE colleges and universities. With the numbers of students in higher education set to rise to 50%, there has been an increased emphasis on courses that focus on the needs of employment. The introduction of two year Foundation Degrees (in England) in 2001 is one aspect of this.

The biggest change is the increased national emphasis on skills acquisition and lifelong learning. The National Learning and Skills Council in England has been established with 47 local arms and a budget of £6.5 billion. It is charged with working with two other recently established agencies, RDAs and the NTOs, and with achieving two major objectives:

- To raise the sustainable level of employment through the updating of skills and embracing of new technology;
- To reach and draw into learning those who were previously economically inactive or have been victims of industrial or economic change.¹⁶

Government strategy for achieving a high-skills high value-added economy has four ingredients:

- Strengthening links between what people learn and what they will do;
- Creating excellence in vocational learning so everyone can achieve their potential;
- Reaching out with basic skills training to those who the system failed first time with a flexible system of lifelong learning for all;

16 'Learning to Succeed: A New Framework for Post-16 Learning.' DfEE (1999)

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- Working with employers to give everyone the chance to boost skills and productivity.

In Wales, Scotland and Northern Ireland, education and training are devolved powers. Details of current strategies, as they affect the audio-visual industries, are given in **Section D**.

The broad picture is of Governments and their agencies across the UK attempting to set up strategies to identify employment needs and to put in place the policies to satisfy them. There is bound to be a gap between the pace at which sectors can identify their needs against a background of rapid industrial change and the ability to establish mechanisms to respond to those needs.

This section provides a picture of current education and training provision. In **Section C3** the AVITG sets out recommendations to support new policy developments, either by Government or by the industry sectors.

School and Further Education

There are an estimated 2500 students registered for and working toward media vocational 'A' Levels and GNVQs in schools and FE colleges. The qualifications are general 'applied' learning and assessment routes that have been designed to establish a real parity with existing GCSEs and 'A' Levels. These qualifications are available in England, Wales and Northern Ireland. There are no direct equivalents in Scotland. Further research needs to be undertaken to establish exact progression routes, but the expectation is that holders of these qualifications will progress to higher education, or additional more specific vocational qualifications, rather than direct entry to the industry.

As identified by the QCA/SQA Qualifications Mapping Project¹⁷ for the media and culture sectors, there are over 80 different qualifications offered by national awarding bodies, such as SQA, EdExcel and City & Guilds. These qualifications have been identified by the awarding bodies as being designed to provide vocational support or occupational preparation for the broadcast, film, television and video sectors. There are estimated to be 20,000 full-time and part-time students studying on over 700 courses leading to these qualifications. The courses include very specific coverage, from 'media make-up' to the more general 'media production'.

Higher Education

In 2000 Skillset, in conjunction with other NTOs in the media and cultural sectors, undertook a study to provide a qualifications map for the sector. The Qualifications Mapping Project attempted to gather information on all qualifications offered by national awarding bodies and Higher Education Institutions (HEIs). The response rate from the HEIs was low and has not provided reliable information on the number of undergraduate qualifications

17 'Qualifications Mapping for the Media and Cultural Industries'. PSAG Funded Mapping Study Report (2001)

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relating to the sector and how the HEIs would classify or describe those qualifications (e.g. general academic, vocational or occupationally specific).

However, the first stage of the mapping exercise identified over 2000 HE courses covering film, animation, multimedia, television production, radio production and digital media, as well as the HESA categories of media studies, communications and journalism.

It has been difficult to confirm the numbers of HE courses relating, even in the most general sense, to the audio-visual industries. Neither the qualifications mapping research nor the current Skillset/BFI database (of 600 undergraduate courses) has been able to distinguish between the mainly theory-based media courses and the more practice/vocationally orientated courses.

Individual courses and institutions have however established 'reputations' for vocational provision, and employers in all sectors are starting to establish formal and informal links with particular courses, colleges and universities. The development of Foundation Degrees will further emphasise the need for these formal linkages and partnerships.

The current lack of information about the nature of courses means that it is difficult to quantify levels of investment. AVITG has considered this issue in investment and strategic terms and has set out a number of recommendations to address this fundamental need for background information (see **Section C1**).

Good media practice education cannot be provided cheaply. Courses need access to staff with a record of professional practice and to a range of industry-standard facilities. This does not always happen.

AVITG believes that vocational courses in higher education should be clearly identified and adequately funded. Some correspondents argued that this can only be achieved by establishing 'centres of excellence', however, any such development in HE should follow the successful introduction of accreditation models.

Access Provision

There are a number of access programmes that fall outside the FE/HE qualification provision. These have been developed for a range of different purposes, including the need to support community-based programming, and many combine production and training with a cultural focus. A BFI Survey¹⁸ undertaken in 1999 identified over 200 organisations offering a wide range of courses, most of which are aimed at new entrants and have targeted recruitment policies. Part-time short-term courses are the most common type of provision and many are linked to open college accreditation.

¹⁸ 'Audit of the UK's Independent Training Sector for Cultural Film/Video/TV Production.' BFI (1999)

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Structured New Entrants' Schemes

There are a number of structured new entrant training schemes offered by the broadcasters and larger independent production companies. These schemes offer very practical training, often backed up by specialist short courses and off-the-job training. Trainees are often taken on in specific job areas (e.g. research, graphic design, post-production), but in recent years there has also been an emphasis on technical operations and multi-functional training.

Numbers vary from year to year and depend on need within the company.

The BBC recruits over 400 trainees on around 20 regional and national schemes. Across all the Carlton regions there are approximately 100 trainee places, including structured training for new entrants in sales and graduate management trainees. Granada recruits and trains on average 150 new entrants a year, including 50 trainees for the satellite production facility. Numbers of trainees recruited by independent production companies are inevitably lower; examples are Planet 24 and Bazal each with 4 graduate trainees a year. Overall there are 1,000 known trainee places. The majority of the trainee schemes are based on twelve-month contracts.

In addition to single-employer new entrants' training programmes, Skillset supports around 90 places a year on structured new entrants' training schemes for freelancers managed by the following organisations:

- British Animation Training Scheme (BATS)
- FT2
- Media Skills Wales/Cyfle
- Scottish Screen Training
- Skillnet SW
- VFG
- Yorkshire Media Training Consortium. (YMTC)

The majority are based in London and the south-east, reflecting the industry's concentration. All new entrants' programmes supported by Skillset lead to NVQs/SVQs (Skillset Professional Qualifications).

Modern Apprenticeship Frameworks provide structured approaches to new entrants' training via employers. To attract government funding employers need to ensure their apprentices gain the key skills and the relevant NVQ or SVQ. The Foundation Modern Apprenticeship leads to an NVQ/SVQ at level 2. The Advanced Modern Apprenticeship leads to core or key skills and an NVQ/SVQ at level 3.

Funding from government is relatively low (£3,000 per apprentice) and only just covers the cost of key skills and NVQ delivery. Funding levels are higher in Scotland (about £6,000 per apprentice).

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Funding is not available to support graduates on Modern Apprenticeship programmes (with the exception of graduates in Wales), and the target group for funding has been 16-21 year olds (although funding is available up to the age of 25). Modern Apprenticeship take-up is therefore relatively low in the industry and tends to apply to specific technical and craft roles. There are fewer than 100 (known) Modern Apprentices in the industry.

Short Course Training/CPD

There are many public and private training providers offering training aimed at professionals within the industry. The Skillset/BFI database of short courses lists over 230 separate training providers offering courses. Increasingly, many of these are universities offering CPD programmes.

Skillset subsidises training for freelancers through a number of key training providers who supply industry-standard and relevant training. All courses supported by Skillset are regularly monitored to ensure quality. In 2000, Skillset funded 29 training providers and supported 100 courses which delivered training to 1296 freelancers.

One thing is clear from this activity. There is a need for many different types of approach to training and development. Often individuals need time to develop skills through work experience, and find they cannot move up the career ladder without that experience. Skillset has supported a number of small-scale programmes that offer short (paid) placements, in addition to supporting training input. These have proved to be extremely successful.

Outside London the national and regional training consortia provide a focus for funding and commissioning training for freelancers. Many provide structured courses for new entrants, but, increasingly, they are also providing a service based on individual training needs analysis, leading to 'bespoke' training and development. This model is extremely effective because the needs of the individual can be met in a variety of ways, (e.g. short courses, 'funded experience', access to mentors, etc). The funding 'follows' the individual and training can be sourced from a range of providers. Skillset currently funds the consortia to deliver these 'programmes', and the consortia have also been successful in attracting European or Government funding.

Postgraduate Courses

An increasing number of new entrants and industry professionals are pursuing postgraduate qualifications. Skillset's postgraduate survey¹⁹ undertaken in 1999 identified 119 courses attracting an estimated 4000 students.

Many of the postgraduate qualifications are specifically vocational and cater for those already working in the industry, meeting the need to extend or refresh knowledge and skills. Postgraduate funding is scarce and traditional research student support mechanisms are not always appropriate.

¹⁹ 'Summary of Postgraduate Media Studies Courses.' Skillset (1999)

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Although welcoming the growing reputation of many of these courses, AVITG is concerned that their cost is another barrier to entry for some young people. This issue is discussed in **Section B5**.

B4 SKILLS GAPS AND SHORTAGES

Introduction

Historically, there has been an over-supply of applicants seeking work in the audio-visual industries. However, this is not necessarily sufficient to guarantee an adequate supply of suitably skilled labour. A number of factors have combined to create reported gaps or shortages in certain areas. In particular:

- high incidence of freelance working and the prevalence of SMEs have implications for patterns of entry and individual development;
- The rapid growth of some sectors - notably digital media - may create a sudden demand for large numbers of people with specific skills at a rate which makes it difficult for training and education providers to keep track of demand;
- Many areas of the audio-visual industries are heavily reliant on a supply of graduates with specific skills, many of which are also in demand in other industries. This requires sufficient numbers of people to progress through FE/HE with the appropriate qualifications. The audio-visual industries need to be able to compete effectively with other industries for a supply that currently falls short of demand.

In reviewing skills issues, it is perhaps useful to define what we mean by 'gaps' and 'shortages'. Consistent with the approach of the National Skills Task Force, for the purposes of this report a 'skills gap' implies an area where employers consider their existing workforce to have lower skill levels than necessary to meet their business objectives, or where new entrants lack some of the skills required for them to perform effectively.

A 'skills shortage' refers to an area where there is a genuine lack of adequately skilled individuals in the labour market. This may either result from a national shortage of suitably qualified or trained people at new entrant or higher levels, or reflect geographical imbalances in the supply of labour.

Generic Issues

Audio-visual industries share the same training and education problems as other UK industries, particularly the failure of new entrants to acquire key skills during their formal education.

'Employers repeatedly express concerns about the employability and key skills of young people entering the labour market for the first time, including graduates'.²⁰

In the audio-visual industries, now overwhelmingly an area of graduate recruitment, many employers expressed the same concerns to AVITG.

²⁰ Towards a National Skills Agenda: The First Report of the National Skills Task Force, (1998).

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The education system has been seen as not producing enough individuals with an 'ability to find their own learning'.²¹ A major issue for the audio-visual industries is to ensure that links to the post-16 education system better reflect the industry's needs, especially where specialist courses offer vocational education for industry sectors.

An area where employers are concerned about specific skill levels is business and management. The Film Policy Review identified a range of skills needs, including the need for training for producers, business executives and distributors. So did the Creative Industries Task Force, which looked at television programme distribution, and the Human Capital report²² in its analysis of the needs of the digital media sector in the south-east.

The DCMS Regional Issues Working Group²³ identified specific gaps in business skills:

- Sales
- Marketing
- Administration
- Accountancy
- Financial planning
- Staff recruitment.

But the area where skills gaps have been identified across all industry sectors is ICT. One of the particular concerns for audio-visual industry sectors is that most ICT teaching and learning has emphasised basic 'how to make the technology work' skills, whereas there is a strong argument that using the computer as a creative learning tool rather than a didactic teaching machine leads to enduring change, not just token progress.²⁴

Sectoral Reports

This section summarises the key issues to emerge within each sector, as identified through research conducted by Skillset and other sources.

More detailed reports on skills gaps and shortages in each sector are set out in **Appendix B**.

Television Production (within Broadcasting, Cable and Satellite and Independent Production Companies)

The rapid expansion of the independent production sector over the past 20 years has changed traditional patterns of employment. Broadcasters expect to take on graduates with limited experience and few specific skills who can be developed through in-house corporate training programmes. In contrast, many companies in the independent sector are too small to be able to offer effective in-house training, and expect their recruits to be equipped with both generic skills and an understanding of their business.

²¹ Skills for London's Creative Industries in the Digital Age, (2000).

²² Skills for the Digital Media Industry, (2000).

²³ Creative Industries: The Regional Dimension, (Feb 2000).

²⁴ Creative Industries Internet Inquiry: Snapshot of a Rolling Wave, (Feb 2000)

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Broadcasters and independents alike are reliant on a pool of skilled freelance labour, which often lacks access to training. The number of places available on industry-led training schemes for freelancers does not currently meet demand and is constrained by the available investment. Most current schemes are funded by cross-industry and government investment managed by Skillset. These funding streams (especially from the European Social Fund) can be unpredictable, and thus hamper consistent planning of training provision.

Recent Skillset research²⁵ has highlighted a number of specific skill gaps, or areas of recruitment difficulty, including:

- graphic design
- web design and development
- software engineering
- freelance make-up artists
- producer-directing (as a dual role)
- production management
- production secretaries
- sales and marketing
- business management.

Broadcast Engineering

Engineers are employed in the audio-visual industries by broadcasters, cable and satellite companies and equipment manufacturers.

There is evidence from several sources of a serious shortage of appropriately qualified engineers. Engineering courses represent a diminishing share of higher education enrolment, and engineering graduates are being diverted in other directions for a number of reasons, including:

- the image problem currently affecting the entire engineering profession;
- increased competition from other courses for technically able people;
- competition from other sectors that are perceived as more glamorous and which may be better rewarded.

To further compound this problem there is evidence of a marked deterioration in the quality of engineering graduates entering the industry, as a result of a drop in course entry standards and a decrease in the quality of course provision.

Radio

There are at present few roles where employers have reported major recruitment problems and no apparent skills shortages in radio. However, a considerable number of specific gaps have been identified in the grounding provided by degree courses aimed at preparing graduates for working in radio, including those accredited by the BJTC.

²⁵ Skillset/DCMS Skills for the New Millennium Employer Forum

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Within the main areas of news/sport broadcasting, presenting/production, sales/marketing and engineering/IT, these include:

- voice and presentation techniques
- legal knowledge
- digital editing
- research skills
- web page design
- team working.

Film

The film sector is unusual, even in the context of the audio-visual industries, in its almost total reliance on a freelance workforce. Nor is there a representative employers' body capable of taking responsibility for training. The Film Council, established by Government as a result of the recommendations of the Film Policy Review Group, currently performs the role on behalf of all the stakeholders in the film industry.

The Film Policy Review Group made a number of recommendations in areas where skills issues have been identified. The areas include:

- Production accountancy
- Line producers
- Script reading and editing
- Craft and technical grades
- Specialist media law
- Health and safety.

Production accountancy is historically the area most often singled out by film producers as an area of skills shortage.

Journalism

Broadcast journalism is the one major occupational area in the audio-visual industries that employs an active system of accrediting both first and postgraduate degree courses. The BJTC currently accredits 5 undergraduate courses and 12 postgraduate courses, ensuring that they deliver certain core skills to an acceptable standard, through appropriately qualified and experienced sources.

One result of this is that journalism is becoming increasingly dependent on those able to afford an 'extra' level of education. The sector recognises the dangers of this, and there is support for new first degree courses in journalism. Another consequence is a limited move towards supporting individual students through bursaries, this is described in **Section B5**.

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Some employers have identified gaps in the curriculum of degree courses, but there is little question that the BJTC's system of accreditation has significantly improved skills at the entry level.

Levels of provision of mid-career training by employers are difficult to quantify, but the same problems exist with the training and development of the freelance workforce as in other sectors.

Digital Content Creation

The digital media sector is currently experiencing a major shortage of ICT professionals - along with every other sector in the economy. Most sources anticipate that this shortage is likely to get worse before it gets better.

Specific gaps have also been reported in management skills, including:

- project management
- sales and marketing
- meeting skills
- quality assurance
- people skills
- coaching.

Use of freelancers is less prevalent in the digital media sector than in some of the more 'traditional' sectors of the industry. Furthermore, there is evidence of the development of innovative models of training within the sector, including the use of intranet and structured self-tuition. There is little evidence of a sectoral approach to tackling these issues at present.

Animation

A number of skill gaps have been identified in the animation sector, especially at entry level. Training schemes for new graduates have often had to play a remedial role in bringing graduates up to a skill level where they can contribute effectively. Some of the gaps identified include:

- basic drawing skills
- capability to exploit opportunities in digital content creation
- pre-production (including scriptwriting, design, storyboard and layout)
- producing and production management
- trainers (as animation requires a high trainer ratio).

Programme Distribution and Marketing

Programme distribution or marketing has been identified as a growth area by both industry and government. In global terms, Britain is the second largest exporter of TV programmes. The sector currently comprises primarily small employers with fewer than 25 employees each. Recent research conducted by the BTDA has revealed that the sector has developed little specialist training

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geared to its specific needs. Given its increasing importance, the sector now needs a more structured approach to training.

Ancillary Services

Subtitling, signing and audio description provide vital services for the UK's hard of hearing, deaf and visually impaired population, allowing access to television. Following the Governments' review of these services, the target for subtitling on digital terrestrial television (DTT) has been increased, and the targets for subtitling, signing and audio description on DTT will be extended to digital cable and digital satellite as part of the forthcoming Communications Bill. This will result in increased demand for skilled staff.

A number of gaps have been identified in the provision of ancillary services to broadcasters, including subtitling skills (especially in the context of live news or shows) and basic skills in spelling, grammar and punctuation.

In addition, there is a severe national shortage of BSL/English interpreters.

Computer Games

Further research needs to be undertaken to identify skills gaps and shortages in the computer games sector.

A report commissioned by the DTI²⁶ to explore the links between the computer games sector and HE providers identifies skills gaps in project management, business management and development.

Business to Business

Business-to-business communication is a major industry sector that has yet to develop a skills strategy.

The sector recognises the need to plan collectively for its future training needs. The overall shortage of workers with key ICT skills is a current problem, and many companies also lack staff with training in general management.

The International Visual Communication Association (IVCA), the sectoral trade association, is trying to establish an index of current training provision as a first step.

²⁶ *The UK Games Industry and Higher Education*, DTI/Human Capital (April 2001)

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B5 Widening Access

Introduction

AVITG was asked to report whether the provision of training and vocational education for the audio-visual industries is equally available to all who want to work in them. If your business is telling stories about the society in which you work, it makes sense to ensure the people who tell the stories are representative of the society as a whole.

Up to now, the question has been impossible to answer in most sectors because of the absence of reliable data. One of the major achievements of the first industry Census was that it provided for the first time a snapshot of how successful the audio-visual industries have been in ensuring that opportunities for work are open to all.

In addition to the Census, AVITG was able to draw on the report from the industry group, Women in Film and Television, *Working Conditions in the Film and TV Industry*²⁷, and a number of individual submissions during the consultation process. It has also been helpful to be able to incorporate the findings of two major industry initiatives, launched during 2000:

- The Cultural Diversity Network (CDN) is a cross-industry body set up to investigate the employment and representation of ethnic minorities in television. In October 2000 a set of action plans was launched for implementation from 2001 onwards.²⁸
- The British Screen Advisory Council (BSAC) Committee on Ethnic Minority Employment in Film was established in May 2000. The case for developing proposals to increase levels of employment for ethnic minorities in the UK film industry had emerged in 1999 from the Government's Film Policy Action Group. *Achieving Diversity in the Film Industry*, the report prepared by the BSAC Committee, is currently the subject of industry-wide consultation.²⁹

Both these initiatives had a remit to look at broad employment issues, and both acknowledged the central role that targeted training and vocational education have in addressing issues of under-representation. The role of the AVITG has been to focus on these issues.

Key Findings of the 2000 Census

Gender

The 2000 Census indicates that women make up just over one-third of the workforce in the audio-visual industries (36%), but represent a much higher proportion of employees (41%) than do freelancers (26%). This compares with female representation of 45% of all workers in the UK economy - 47% of employees and 27% of freelancers.

²⁷ Working Conditions in the Film and TV Industry: Women in Film and Television; 50:50 Committee, (1999)

²⁸ Changing the Face of Television: Cultural Diversity Network Manifesto, (2000).

²⁹ Achieving Diversity in the Film Industry: A Report prepared by the Committee for Ethnic Minority Employment in Film under the Auspices of the British Screen Advisory Council, (2001).

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There are considerable variations in the percentages of women who are employees and freelancers in each sector. In 'traditional media' sectors, relatively high proportions of the workforce are women. For example, 48% of employees in broadcast television are women, 47% in independent production and 43% in radio.

Employment of women is lowest among the commercials, corporate production and facilities sectors. Representation is especially low in the freelance workforce in these sectors - less than 10% in both commercials and facilities.

The Census also revealed that employment of women is lowest in 'traditional male' roles such as camera, sound and special effects, and highest in 'traditional female' roles such as make-up, hairdressing and costume/wardrobe. Representation of women in director, producer and production management roles is also relatively high- 58% of employees and 39% of freelancers.

Ethnic Origin

In total, 5.4% of employees and 6.4% of freelancers in the audio-visual industries are of minority ethnic origin. This compares with 6.7% of the UK population of working age. However, over half the overall workforce is based in London, where the local population profile is quite different. Nearly a quarter (24.7%) of the population of working age in London is of ethnic minority origin. This compares with 8.7% of employees and 7.7% of freelancers in the audio-visual industries.

The representation of ethnic minorities in each sector of the audio-visual industries varies widely. The animation, commercials and corporate production sectors employ the lowest proportion of people from ethnic minority groups.

Disability

The 2000 Census asked employers to indicate how many of their employees and freelancers they considered to be disabled (obviously a subjective judgement, but none the less a valuable index). Overall, 0.9% of employees were reported as disabled on 19 May 2000, and 0.4% of freelancers. The lowest representation was in commercials, with nobody reported as disabled, and in cable and satellite. The highest representation was in new media (0.8% of employees and 1.3% of freelancers) and radio (1.4% of employees and 0.6% of freelancers).

Barriers to Widening Access

Pre-entry Level

The current lack of clear and accurate careers information presents a barrier to any young person interested in entering the audio-visual industries. The situation is compounded by the existence of numerous different qualifications and media studies courses, resulting in a lack of clarity about what offers the most direct pathway into the industry.

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The BSAC Committee concluded that 'For many members of the ethnic minority communities, the "unprofessional" nature of the film industry contrasts with the clear professional structures which exist in sectors such as law, accountancy and medicine, whereby both educational and professional qualifications provide a clear entry path into employment and career development.'

One of the major arguments for accreditation in further and higher education (**Section C3**) is that it offers the opportunity to provide a professional pathway into industry sectors. Traditionally, many sectors have had no such clear-cut pre-entry pathways and, as a result, have recruited people on the basis of their social skills in the absence of any better information.

Specific initiatives are needed to ensure that young people know about the opportunities offered by vocational courses, and to help them afford the cost of such courses.

Entry-Level Recruitment

Generally speaking this is not an industry that suffers lack of interest from new entrants. However, the range of jobs on offer is often unknown, and some sectors (e.g. business to business, facilities) are not as well known to new recruits as others (e.g. broadcasting or film).

The over supply of enthusiastic academically qualified new entrants can mask difficulties in recruitment for specific roles, such as broadcast engineering, technical and craft roles. It also tends to lead to an over emphasis on graduate recruitment, when other qualifications might be more appropriate.

Foundation Degrees may help to address this issue by providing clearer vocational pathways to jobs, but only if employers become actively involved in their development.

The competition for entry-level jobs is intense. Whereas some employers still recruit new entrants and provide structured on-the-job training (broadcasters, facilities companies, larger independents), most people enter the industry on an ad hoc basis, working as 'runners' or 'assistants' on short-term contracts (paid and unpaid). This is a particular disadvantage for people from ethnic minorities.

A small number of individuals enter the industry through cross-industry structured new entrants' schemes like those managed by FT2 in London, or Scottish Screen in Glasgow. Educational qualifications are not necessary for these schemes, and they operate proactive equal opportunities policies, drawing trainees from diverse backgrounds. FT2, for example, has a target to recruit 50% women and 33% ethnic minorities. Yet even here the recruitment experience in recent years has been that the diversity of people seeking to enter the industry has been narrowing. In London, the low level of allowances that training programmes can afford to pay, coupled with the high cost of living, means that individuals from economically disadvantaged backgrounds literally

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cannot afford to enter the industry through the schemes set up to offer opportunities for them.

In the end, it is essential for industry sectors to take steps to ensure that all their recruitment points - formal and informal, for freelance or staff - operate open access policies. Many of the larger employers are already taking steps to achieve this. Small companies should look for ways to achieve the same objective.

Career Progression: Training and Development

Anecdotal evidence suggests that opportunity does not follow from training for individuals from ethnic minorities, for people with disabilities or for women.

Although little detailed research exists to support this perception, *Working Conditions in the Film and TV Industry*, produced by Women in Film and Television, identified the negative effect of the long-hours culture and other working conditions on women. More generally, the low level of ethnic minority representation on the boards of the major broadcast employers and in senior management levels is still evident.

Examples of Existing Initiatives to Widen Access

There are already a wide range of initiatives seeking to improve the diversity of the audio-visual industries' workforce. The following examples are intended to give an indication of the variety of approaches;

Access Workshops

There are a number of well-established access workshops across the UK. Schemes such as Youth Culture Television (YCTV) and North Kensington Film & Video Workshop in London, Edinburgh Film & Television Workshop and Ty Ffilm in Cardiff have strong links with their local ethnic minority communities. The most effective of these workshops have typically forged links with the industry. However, in the main they are funded by the public sector.

Work Placements

A number of the main broadcast employers have introduced work placement schemes to expose under represented groups to the range of opportunities available within their companies. Examples include the BBC's *Extend* programme, which offers placements to people with disabilities.

A different approach is that of work placements organised by external agencies. *Workable in the Media* works to promote the skills and abilities of disabled people and provides pre-recruitment guidance, work placements and career support for current or recent graduates who want to move into the media industries.

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Bursaries

Bursaries have been used to provide a clear and targeted approach to increase the diversity of the workforce in areas of skills shortages and gaps. With engineering clearly identified as a skills gap across the broadcasting sector, the ITV companies recently recommended funding for ITV engineering bursaries from the ITV Training Policy Group. These will have a recruitment policy of positive action to increase diversity in engineering departments.

In another example, ITN plans to refocus its financial support for graduates by offering bursaries to those wishing to study for a BJCT-accredited postgraduate diploma. It is likely that such a scheme will encompass paid work experience during the course, along with a guarantee of employment with ITN upon its successful completion. It is ITN's intention to ensure that the ethnic make-up of the individuals offered such bursaries reflects the make-up of the total UK population.

Cross-Industry Structured New Entrants' Schemes

A small number of industry-led schemes operate to provide the independent broadcast and film production sector with a pool of well-trained technical and production freelance workers. Designed and operated as joint ventures between employers, unions and private training providers, they provide some of the best methods of developing employable skills.

Educational qualifications are not necessary to get on these schemes and they operate proactive equal opportunities policies, drawing trainees from diverse backgrounds. As with an apprenticeship, the trainees on these schemes are attached to a variety of productions over an extended period - anything from 15 months to 2 years - and paid a modest monthly allowance. Practical experience is supplemented by intensive short courses and assessment for the relevant Skillset Professional Qualifications (NVQs/SVQs).

The majority of training places are available through FT2, a UK-wide scheme based in London, with other programmes organised by Scottish Screen Training, Cyfle/Media Skills Wales, YMTC and Skillnet SW.

Databases

One approach taken by a number of production companies has been to establish databases of individuals from under represented groups as a way of increasing the access of programme makers to the talent available. The BBC's Ethnic and Disability Talent Base currently stands at around 4000 people. Meanwhile, Channel 4's web-based database *Four All* lets production companies making programmes for Channel 4 search for information about disabled people who are potential media workers, programme contributors or audience members. Access to the site is carefully controlled because of the sensitive nature of the information it contains.

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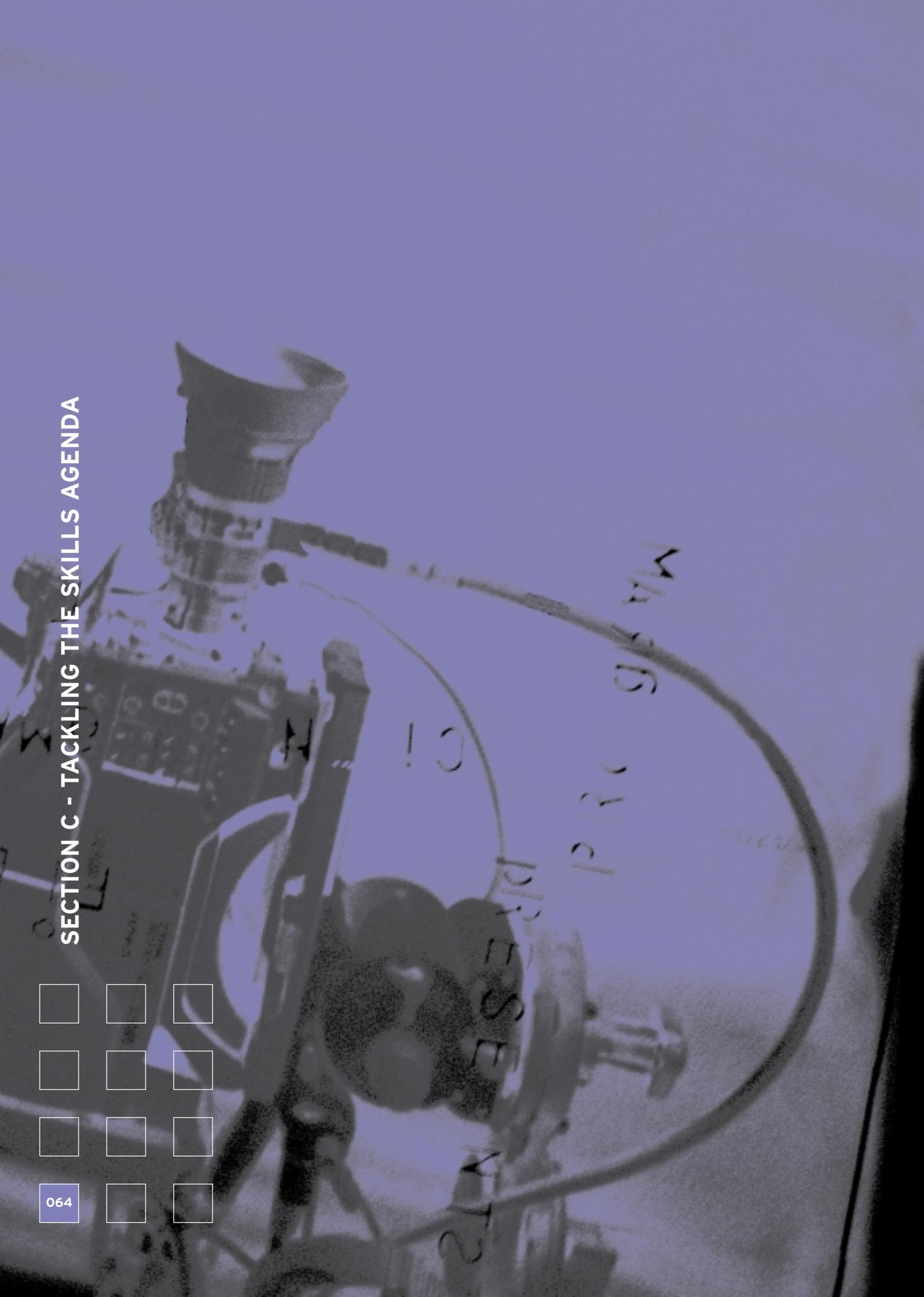
Mentoring

Mentoring programmes exist within many of the main broadcast employers and film production companies.

The BBC's Mentoring and Development Programme is a 12-month programme that targets talented staff and seeks to integrate diversity into management development. Of the 30 'mentees' recruited, 16% were from ethnic minorities. 'Mentees' are matched with a senior mentor and study groups. To date, seven of the 'mentees' have been promoted or have taken on greater responsibilities in their current roles.

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SECTION C - TACKLING THE SKILLS AGENDA

C1 THE INFORMATION TASK

It has never been harder to forecast the medium-term future of employment in the audio-visual industries, or more important to monitor the impact of change. Regular and reliable labour market information is key to understanding what is happening.

Unfortunately, some of the most dynamic and fast-moving sectors are poorly served by official sources of information. Although they continue to record valuable information on 'traditional' segments of the economy, approaches such as the Labour Force Survey have not proved sufficiently responsive to new roles in developing sectors.

As a consequence, there is no basis for measuring growth or transition in these sectors. In particular, the Standard Industry Classification and Standard Occupation Classification systems, used to break down the UK economy for sources such as the Labour Force Survey, do not provide a useful base from which to analyse employment in the audio-visual industries.

Although it is possible to map the decline of manufacturing industry with infinite precision, there are no means available to chart the expansion of the most critical sectors of the 'knowledge economy'. Nor is it possible to understand the processes of migration between sectors resulting from 'creative destruction' (the development of one area of the economy at the 'expense' of another, often with the potential for skills to be transferred directly).

Against this background, AVITG's first priority was to set in train a new programme for a regular cycle of research. In essence, this consists of three initiatives.

Employment Census

This survey, targeted at all employers for whom records exist, collects information on total employment and freelance usage, including proportions of women, ethnic minorities and disabled people in the workforce, as a snapshot on one day. It was conducted for the first time on 19 May 2000 and the results were published in autumn 2000, both in hard copy and on Skillset's website. This first attempt was widely recognised as a success, attracting a 100% response from broadcasters and over 700 returns overall. It is recommended that this now become an annual event every late spring/early summer. The second Census took place in June 2001.

Skills for the New Millennium Forum

This panel, representing every industry sector, was set up in autumn 2000 as a sounding board for views on emerging skill needs, gaps and shortages. The first collection of views took place in October 2000, with a short and open-ended

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Skills for the New Millennium Forum

The Skills for the New Millennium Forum is a panel of senior employers representing all sectors of the audio-visual industries that provides Skillset with a responsive gauge of emerging skills needs and deficiencies. Members complete a short, open-ended qualitative survey every six months followed up by short, informal gatherings to discuss and analyse the findings. The views and information offered by the Forum are critical in informing Skillset's investment policy, and provide vital substance for the Sector Workforce Development Plan.

Membership of the Forum is fluid and flexible and is intended to reflect the dynamic nature of the industry. Current representation includes the BBC, ITV companies, Channel 4, Channel 5, GWR Group, Discovery UK, Hartswood Films, The Film Consortium, Artem and Epic. Representatives of BECTU and the NUJ are also invited to attend the meetings.

questionnaire aimed at giving employers maximum opportunity to express their concerns.

Given the rapid pace of change within the industry, this exercise should be repeated every 6 months. In addition, distribution of the questionnaire should be interspersed with informal discussion/networking events to facilitate exchange of views.

Freelance Survey

A major sample survey of freelancers was carried out by Skillset late in 2000, covering areas such as biographical and demographic data (to flesh out the Census findings) and qualification levels, training received and perceived training needs (to balance the voice of employers from the Forum). This exercise has been a major success, obtaining a higher response than the Census. The results are being published both in hard copy and on Skillset's website. It is suggested that this survey be conducted on a biennial basis, every other winter.

Currently, the sectoral coverage of all three elements is as follows:

- Animation
- Broadcast radio
- Broadcast television
- Cable/satellite
- Commercials
- Corporate production
- Facilities
- Feature film (NB: coverage in the first Census was incomplete)
- Independent production
- Interactive media.

It is proposed that all future Skillset cross-industry research should expand to cover the following areas:

- Cinema exhibition
- Cinema distribution
- Computer games/interactive leisure software
- Front-of-camera roles in all sectors covered.

It is intended that this body of research will attract a sufficient response to enable full analysis to be published for each nation and region in the UK.

The benefit of developing agreed definitions and a common methodology for tracking employment in the audio-visual industries could be extended to the collection of data on related industries. For example, the recent DCMS publication, *Creative Industries Mapping Document 2001*³⁰ has had to rely on collating employment data from a wide range of sources (including the AVITG Census), which inevitably reduces the value of the conclusions that can be drawn.

³⁰ 'Creative Industries Mapping Document', DCMS, (2001)

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This schedule of research will need to be supplemented by a programme of sector and occupation-specific research, such as that recently conducted by Skillset on the radio and engineering sectors.

The importance of Skillset continuing to work closely with the NTOs covering related industries (particularly the 'converging' industries of IT and communications) must also be recognised. This will be formally maintained through Skillset's continued participation in the ITCE Strategic Forum and MEDiate.

One area where a significant information gap will remain is knowledge about the supply of training and education for and within the industry. Although Skillset has conducted some research into the provision of relevant FE/HE, there is little quantitative information about investment into education and training, by either public bodies or employers, as discussed in **Section B3**.

The continued existence of an industry research group, such as the AVITG's Research Working Group, which represents all sectors of the industry, will be critical to developing a comprehensive research programme. It is, for example, unlikely that either the methodology employed or the forms used to gather information for the Census will remain the same from one year to the next. The means used to gather information will need to take into account new and evolving occupations and the changing ways in which sectors interface. Experienced researchers with suitable levels of industry expertise must continue to participate in the work of such a group.

Recommendations

Skillset should:

- establish a permanent research working group to advise on an on-going programme of research;
- hold an annual Census of employment in all sectors of the audio-visual industries;
- carry out sector-specific research on employment and skills in the interactive media, computer games, post-production, facilities and business to business sectors in 2001/02;
- work with other partner NTOs to produce research on employment and skills in areas of overlap (e.g. Publishing NTO - Digital Content Forum, E-skills - Computer Games, EMTA - broadcast engineering);

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Sector Workforce Development Plans

Skillset has produced the industries' first ever Sector Workforce Development Plan. This plan is the single most important tool with which Skillset can fulfil its strategic remit and is intended to inform, advise, influence, and, most importantly, persuade others to act.

Skillset's plan is based on the research generated through the AVITG and builds on the labour market data and analysis of skills gaps and shortages and future skill trends.

The plan sets out the priorities for action in the medium to long term and will set the framework for on-going partnerships between the industry and public policy and funding bodies.

- undertake further research to identify education and training supply in FE/ HE and the independent training sector;
- develop a methodology, in partnership with key employers and trade associations, to capture reliable cross-sectoral data on investment in training;
- work with national and regional training consortia and relevant public agencies to undertake regular surveys of sectoral skills needs for the English regions, Scotland, Wales and Northern Ireland;
- produce, UK-wide sector workforce development plans to inform on-going strategy and investment in partnership with public agencies.

Governments should:

- fund Skillset to undertake the labour market research and skills forecasting intelligence necessary to produce workforce development plans to inform government and industry policy and investment;
- track their investment in education and training sectorally.

C2 PRE-16 EDUCATION: NUTURING CREATIVITY

Everyone working in the audio-visual industries knows that creativity is an elixir that cannot be bottled and mass-produced. The best way to produce and reproduce it is to ensure that young people learn in a creative environment, with access to the tools that enable them to communicate what they want to say.

Government has proposed a range of policy initiatives³¹ designed to nurture and liberate talent. AVITG endorsed the national policy framework set out in this discussion document:

- The need to sustain and encourage **excellence**;
- Opening **access** to as many people as possible;
- Ensuring creativity is central to individuals' learning experiences within the formal and informal **education** structures of our society;
- Recognising the value of the **creative economy** to us all.

AVITG was also impressed by the wide-ranging report from the National Advisory Committee on Creative and Cultural Education (NACCCE), *All Our Futures*³². Its emphasis on the importance of creative and cultural education for every child in the country is, in our view, central to the future success of the audio-visual industries.

The report summarises employers' needs as follows :

'While employers continue to demand high academic standards, they also want more. They want people who can adapt, see connections, innovate, communicate and work with others. The new knowledge-based economies in particular will increasingly depend on these abilities. Many businesses are paying for courses to promote creative abilities, to teach the skills and attitudes that are now essential for economic success but which our education system is not designed to promote.'

Too many Billy Elliots never get the opportunity to realise their potential, never learn the skills for survival and success. All the post-16 training in the world cannot compensate for failures in pre-16 education.

The most effective approach to pre-16 education is to unlock potential in young people by preparing them all for a world where work is undergoing rapid and long-term change. That is why schools should be communities offering pathways for progression to all their pupils.

Government's response to the NACCCE report has been encouraging. Two initiatives, *Creative Partnerships* and *Culture Online*³³, have been launched. The Curriculum Framework, introduced in September 2000, places a greater emphasis than before on creative and cultural education.

³¹ 'Culture and Creativity: The Next Ten Years.' DCMS (2001)

³² 'All our Futures: Creativity, Culture and Education. NACCCE (1999).

³³ 'Creative Partnerships and Culture Online are major initiatives to join together Cultural initiatives, artists and creatives with schools. This was a recommendation of 'Opportunity and Skills in the Knowledge-Driven Economy' DfEE (2001)

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It reinforces the position of art, music and physical education as subjects in the school curriculum, and gives increased recognition to the status of drama and media within English.

AVITG also welcomed the Government's drive to create new specialist opportunities for vocational education for young people beyond compulsory school age. Training for the audio-visual industries demands high-quality resources, both human and physical, and focusing investment to maximise its value is realistic.

A fascinating study of two art and design institutions *Securing Innovation and Creativity in Design Education*³⁴, explains in detail why, at certain times and in certain places, particular communities have become the focus of outstandingly creative and innovative activities. This is as close as possible to an analysis of how you can train to produce creative people. Both institutions, Ravensbourne College of Art and Design and the Architectural Association School of Architecture, could be characterised as successful 'learning' organisations.

AVITG was impressed by how the immediate physical and social environment plays a part in stimulating creativity at all stages of learning. This is as true for working communities as it is for educational ones.

Most creative people are happiest working with or near other creative people, so it is important that centres of excellence should be encouraged as and when they emerge: like the Soho independent television production sector of the 1980s, like the animation industry in South Wales of the 1990s, like the digital content producers in Sussex today.

AVITG wants to see a learning culture encouraged and supported in the home, at school and in work. This is the most effective way of nurturing the seeds of creativity in a free and questioning society.

Recommendations

Governments and the relevant qualifications authorities should ensure that:

- creative and cultural education continues to be central to the school curriculum;
- children are given the opportunity to learn as early as possible the key ICT skills that underpin the creative industries and cultural careers of the future;
- children have access to education about the media's role in society;
- National and Regional Development Agencies should actively encourage audio-visual and other creative enterprises to develop in clusters where people can learn from each other.

³⁴ 'Topic: Securing Innovation and Creativity in Design Education.' DfEE/HEQE, (1999)

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C3 POST-16 EDUCATION AND TRAINING: A NEW APPROACH

The nature of current vocational education for the post-16 sector, and the need to harness the expertise already committed in this area, has been a constant theme in AVITG discussions. This section concentrates on post-entry education and training schemes - lifelong learning and CPD are covered in **Section C4**.

As described in **Section B3**, there are already a wide range of courses and qualifications on offer. Evidence from AVITG's consultation with industry confirms there is also a widespread demand for education providers to play a more central role in preparing people for work and in supporting CPD. Colleges and universities are well aware of the need to provide curricula and teaching that enable students to prepare themselves for the demands of future employment.

But there is more that can be done to build links between education providers and the audio-visual industries, and to help each side understand what the other needs and has to offer. In particular, FE/HE providers need to identify courses that set out to be vocational, and need to ensure they are equipped to achieve their goals. A number of national and regional initiatives have been launched to resolve these issues.

In many ways, distinctions between FE/HE are less clear-cut than they were, as ladders of progression are created in the post-16 sector. However, to reflect the current structures of FE/HE, we have here treated the two learning routes separately. Developments described in the FE sector also relate to private or independent training providers whose main funding source is government.

Further Education

There are many different courses and qualifications aimed at further education delivery. These tend to be practical and specifically vocational. The Qualifications Mapping study has identified the range of qualifications and the main 'intention' of awarding bodies in developing them. Eighty of these qualifications are vocational in intent, but most are broad-based and few have been mapped against industry standards.

Very recent policy developments and announcements made through the DFES and QCA have started to address this, including a consultation issued by DFES on the establishment of 'Centres of Vocational Excellence'(COVES)³⁵. The proposals below relate to England only unless otherwise indicated:

- To rationalise funding in FE by identifying 'Centres of Vocational Excellence', so that not all colleges offer all types of vocational provision and so that additional funding can be focused on supporting higher-level provision in specialist centres. This is particularly important when capital costs are high;

³⁵ 'Centres of Vocational Excellence: Heralding a New Era for Further Educations: A Paper for Consultation.' DFES (2001)

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Granada – Links with Colleges of FE/HE

Granada plc has developed a range of internal training schemes and external links with key education institutes and industry partners.

One example of this is Granada Television in Manchester, which is aware of the need to nurture local talent and facilitate strong relations with local colleges and universities. In 1996 it launched the Granada Media Education Partnership, a relationship with five colleges and training providers in the NW selected by tender. Criteria included relevance of course content, currency and attitudes of tutorial staff, technical facilities, student diversity and graduate employment statistics. The company provides Granada branding, structured work experience, and access to industry professionals. It also gets involved in curriculum design and provides direct financial contributions to support equipment bids.

- Qualifications aimed at FE will be accredited by the QCA. The main purpose of these qualifications will be made clear by the accreditation 'classification'. Those qualifications that are aimed at vocational preparation (and occupational skill and knowledge development) will have been based or mapped against industry standards;
- Some of the qualifications will be identified as 'technical certificates'. They will specifically provide programmes of learning and areas of assessment to support the skills and knowledge needed in identified job roles;
- These qualifications will be used to support an enhanced Apprenticeship system, which will combine on and off-the-job learning. Apprentices will achieve technical certificates and NVQs;
- New Foundation Degrees are currently being developed and piloted in England. These two-year vocational degrees will be developed and delivered by partnership arrangements between FE/HE. Foundation Degrees will also use the industry standards and incorporate on-the-job learning and assessment. They have the potential not only to provide a progression to HE via FE, but to become valuable qualifications supporting direct entry and on-the-job development.

AVITG welcomes these developments and proposals, and notes that NTOs, working on behalf of their industry sectors, will help to:

- identify regional 'Centres of Vocational Excellence';
- identify technical certificates and programmes of delivery to support 'off-the-job' training;
- continue to develop national occupational standards to inform a wider range of qualifications, including Foundation Degrees;
- consult with the industry to ensure that the Modern Apprenticeships can be structured and implemented to provide the work-based learning route for many craft and technical job roles in the industry;
- support similar developments in the nations as appropriate, and as supported by industry consultation.

The DCMS is already working with DFES and the LSC to identify pilot 'Centres of Vocational Excellence' in media. Positioning NTOs as a crucial source of information and on-going support is an important step forward. It is essential that NTOs are adequately resourced to fulfil these functions, an issue discussed in **Section C9**.

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Higher Education

Most employees or freelancers in the industry have higher education qualifications at first degree level. Many hold postgraduate degrees. An increasing proportion of these entrants have media-related degrees.

Universities now deliver a wide range of programmes that offer initial and continuing professional development. There have been significant changes in student course choice, with growth in new disciplines, including many related to the audio-visual industries.

Within HE there is a vast range of course types. Some are academic, concentrating on the nature and role of media in society. Others use media practice to underpin theory. Others are vocational in content and focus primarily on developing skills relevant to the industry sectors whose needs they reflect. In practice, there is a continuum from the mainly academic to the mainly practical, and there is no easy way of determining where on this continuum a particular course can be placed.

Universities in particular are responsible for the nature and standard of their own qualifications, subject to external audit. Often the course title identifies the unique rather than the generic quality of the provision.

A first degree programme differs from a postgraduate one by level and specialism. These labels do not help differentiate the type of degree. There are specifically vocational first degree programmes and very theoretical postgraduate programmes.

Potential students need more information about the types of course available, the kind of skills they need to develop and the range of courses that would be useful in preparing them for employment.

The need for better careers advice is outlined in **Section C6. skillsformedia** will play an important role in providing this type of information to new entrants.

AVITG has also discussed the benefits of a more formal partnership arrangement between industry sectors and particular courses and institutions in HE. These would have the dual functions of:

- signposting courses aimed at vocational preparation, in addition to the broader aims of a degree programme;
- providing a mechanism to ensure that employer needs are informing provision and the co-ordination of industry support for vocational provision.

Developing more formal relationships between industry sectors and education providers should benefit both parties. Industries gain better understanding of the educational objectives and can input into curriculum development. Courses should be able to work more closely with companies in areas like access to work

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placements and support with resources.

In the case of journalism, and in other industry sectors, formal industry-based accreditation procedures have been developed to offer assurance to employers about the quality of a university programme and its relevance to the industry's needs. The accreditation of programmes in other areas of professional activity, such as medicine, law and engineering is, of course, well established.

AVITG sees value in introducing and supporting forms of accreditation for specific courses. Further work needs to be undertaken to explore the most appropriate models of accreditation and the areas where it is needed and supported by partners in particular sectors of the audio-visual industries.

AVITG recommends course accreditation as a first stage towards the identification of centres of excellence in HE. Both FE centres of vocational excellence and HE accredited courses will require the support outlined below.

Matching Skills Needs with Course Delivery

The identification of specific sectoral skills needs will become more sophisticated as links between industry and FE/HE develop, but they will only ever form part of the picture. In particular, higher education has goals that are far broader than vocational training, and all programmes contain significant amounts of theoretical and cultural background. Employers made it clear in AVITG discussions that they need entrants with the ability to maintain their learning, rather than those who reach them who arrive with a set of non-transferable skills.

Both FE and HE providers play a key role in supplying the demand for these enduring and transferable skills. Industries know what they need to tackle immediate problems: they are not always the only or the best judges of the skills needed for long-term growth.

Bringing education providers and industry representatives together is vital. The Royal Television Society (RTS) already plays an important role in organising regional events and information sessions aimed at increasing partnership and understanding. Now it plans to extend its activities as a communicator and as a supporter of professional development. The DCMS in conjunction with Universities UK has established a new Creative Industries/Higher Education Forum to look at improving communications between the creative industries and higher education.

Where courses are aimed at developing specifically vocational or occupational skills, they should be more directly informed by industry needs. The national occupational standards developed by Skillset and approved by QCA provide a useful starting-point for curriculum development. They articulate the needs of the industry, specifying skills and knowledge required for job roles.

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Broadcast Technology Training: Links with Higher Education

The Higher Education sector has for many years attempted to provide suitable vocational courses for the broadcast industry. However, a lack of funding has often led to an undue emphasis on media theory rather than media practice. BBC Training and Development recognised the value of HE courses in equipping graduates with a higher skill/knowledge level when commencing training courses. Partnerships have been established with a number of universities which have now designed new vocational courses and utilise BBC facilities to enhance existing degree programmes.

The benefits to the industry are:

- Shorter training courses;
- Guaranteed pool of talent;
- Opportunities for students to receive sponsorship from the industry;
- A higher profile for Broadcasting as a career;
- Engineers with increased skills/knowledge.

Work Experience

Every available piece of research emphasises the importance of work experience. The effectiveness of placements, measured by subsequent offers of employment, is high. Industry has a fundamental role to play in providing effective placements, and demand for work experience opportunities far outstrips their availability.

The quality of work experience is also variable. Work experience opportunities need to reflect more appropriately the needs of students at different levels.

Identifying those courses and qualifications that are aimed at supporting entry into the industry (in specific occupational roles) will assist employers in responding to the demand for work experience.

Work experience opportunities should be seen as an essential component of industry-accredited courses in HE and those courses offered by FE centres of vocational excellence. Further work needs to be carried out to identify appropriate mechanisms which will help industry and education match students to known opportunities, particularly in SMEs. Industry sectors need to agree guidelines to support good practice in the delivery of work experience.

Industry Expertise and Direct Support

Employers and professionals already provide direct support to FE/HE courses. This ranges from direct input into curriculum development to lecturing and providing access to equipment.

When centres of excellence are identified this support should be targeted in order to provide the specific sector support required.

Direct industry support for postgraduate provision is particularly needed. Many courses are directly vocational and are increasingly required at entry level. There is little public funding available for postgraduate provision, and the result is that those who can afford to pay for their qualifications are also securing fast-track entry into certain professions. Industry accreditation could be supported by bursary schemes aimed at attracting and supporting a more diverse range of students and potential entrants.

Courses at this level could also be supported by capital investment and/or access to equipment and supplies. Equipment manufacturers and suppliers have the ability to make an important contribution here. There are many examples of this happening already, but support is spread across many providers and might be more effective if it were targeted at centres of vocational excellence in FE and accredited courses in HE.

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Supported On-the-Job Training for New Entrants

Focusing and supporting pre-entry training and education will assist people in preparing for work and developing general and occupational skills that will benefit all employers. Specific training to develop individuals in job roles needs to be delivered by employers and industry-based training providers. There are examples of employers in all sectors who have well-developed and structured schemes, and the independent sector has supported the development of industry new entrants' programmes (FT2, Scottish Screen, Cyfle) to train new entrants for freelance employment.

A significant proportion of new entrants, however, do not receive any 'structured' training. Many employers (particularly in SMEs) need support in training their workforces.

Modern Apprenticeships and Graduate Apprenticeships are not common in audio-visual industry sectors, yet they are the main source of government funding for employers to support new entrants' development programmes. The new frameworks and the introduction of work-based Foundation Degrees could provide a useful structure and source of funding.

Funding for such schemes (particularly Modern and Graduate Apprenticeships) needs to be increased to reflect the real cost of delivery and, as has already happened in Wales, to support graduates who join these schemes.

Recommendations

Skillset should:

- work with QCA to develop and implement a strategy in England, Wales and Northern Ireland to support the accreditation of qualifications;
- work with the DfES, DCMS, RDAs and LLSCs to identify and support the establishment of FE Centres of Vocational Excellence in England and work with Governments and their agencies in Wales, Scotland and Northern Ireland to support policy developments;
- carry out a consultation within the audio-visual sectors to support the take-up of the Modern Apprenticeship framework across the UK;
- explore the potential for introducing Graduate Apprenticeships into the industry across the UK;
- in partnership with industry organisations, develop and/or provide further support to HE course accreditation schemes across the UK.

In order to do this, Skillset will:

- consult with other sectors (**Appendix B**) that have identified HE course accreditation as a recommended approach to structuring more formal links between HE providers to identify priorities and potential partnerships;

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- undertake research into the different models of accreditation;
- develop, with and on behalf of industry sectors, guidance to support best practice in organising and managing work placement opportunities;
- work with the BJTC to support the existing journalism accreditation model and with the Film Council to pilot an accreditation scheme for screen-writing courses;
- use industry standards to inform accreditation criteria.

Employers should:

- offer targeted support to centres of vocational excellence and accredited courses (e.g. access to work placements, access to equipment/suppliers linked to the requirements of the course, industry input in delivery and capital investment).

Governments should:

- ensure that Skillset is adequately funded to carry out work to support the development of a qualifications strategy, and to identify and coordinate support for COVES;
- make funding available to support Graduate Apprenticeships within the industry;
- increase the funding to support Modern Apprenticeships within the industry.

C4 OPPORTUNITIES FOR THE INDIVIDUAL

Introduction

The individual makes the key commitment to learn, in and out of the workplace, not the training provider.

Education and training programmes will be needed throughout the audio-visual industries to enable everyone to maximise the opportunities afforded by new technologies - both to improve the quality of their lives and to enhance work prospects.

In addition, in a world where few can expect to stay with one company throughout their working lives, individual acquisition of skills needs to be recognised at all stages of a career.

For the audio-visual industries, AVITG proposes two objectives:

- To ensure individuals have access to opportunities to learn new skills and to develop their potential at every stage of their working lives, whether or not they are 'in work';
- To ensure individuals have a record of the standards they have achieved, recognised by the industry sector in which they work.

Continuing Professional Development (CPD)

As described elsewhere, there are a number of opportunities for professional development. These include:

- postgraduate programmes aimed at career development - offered on a full and part-time basis;
- a wide range of short courses offered by colleges, universities, private training providers and employers - notably the BBC;
- online/interactive training and development programmes being developed - again by colleges and universities (often with public and European funding) and by employers (BBC, Granada, Channel 4);
- events and training activities organised by industry bodies like PACT, IVCA, RTS and TIGA;
- access to professional training needs analysis via the national and regional consortia groups, and potentially through **skillsformedia** (see **Section C6**).

AVITG has recognised the need to collect further information about the range of programmes available to support professional development; this forms a recommendation in **Section C1**. But, even where the supply exists, the issues of funding, relevance and quality remain to be resolved.

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Company Based Skills Passport – ARTEM

Artem – a special effects facilities company has introduced an innovative approach to company training and skills recognition.

Employees are issued with a detailed log-book itemising all the skills required for the range of very specialised roles in physical and digital special effects, including animatronics, models and miniatures, props, pyrotechnics and fire, atmospherics and mechanical rigs.

When individuals have received training, or achieved the skills listed, the log is signed-off – providing a formal and portable record of skills development. This Training Passport is physically modelled on an actual passport, with both a photograph and an official stamp. The next step is to link the skills check to Skillset standards, and possibly, develop a recognised general qualification.

Funding for CPD

In the television sector, Skillset manages the FTF, reflecting the need to subsidise training and development programmes for freelancers already working in the industry. This subsidy can cover 60% of the cost of training for individuals who have demonstrable professional experience. Contributions to the FTF come from the broadcasters and the IPTF.

The current level of FTF funding cannot satisfy demand. In any case, the costs carried by individuals towards their training often puts them off. Also, under current guidelines, 'runners' and other new entrants cannot receive the subsidy.

Other sectors, apart from the SIF in film, do not have industry-wide funds to support training for individuals.

Individual Learning Accounts (ILAs) and career loans may be a useful source of support for individuals, and AVITG hopes the identification of priority training needs will enable sectors such as digital content production to do more to address the funding of individuals' vocational training. The Sector Challenge Fund (1998-2000) and European funding sources (ESF, Adapt) have been used in the past to match industry funding in support of the development of these programmes.

It is crucial that training and educational opportunities are affordable by individual learners throughout their careers. Too many workers with the potential to learn new skills leave the industry in their 40s and 50s because they are given no realistic opportunity to retrain.

Professional Qualifications and a Skills Passport

If individuals are successful at GCSE, they are given a certificate. If they complete a university course successfully, they leave higher education with a record that they have reached degree standard. Yet, as they develop their skills throughout a working lifetime, they usually receive no further evidence of personal development. CVs are often the only records, apart from personal testimony, that a future employer can consult.

Skillset has developed a suite of national occupational standards and professional qualifications (NVQs/SVQs). Currently some 3000 professionals in the broadcasting industries are registered for these at centres throughout the UK. They have been available for over 6 years and have been used extensively to support new entrants' training, particularly where that training is 'structured'.

The standards have been developed by professionals in the industry and are well respected, but the process of introducing the qualifications has had a mixed reception. Meaningful qualifications require assessment 'on the job'.

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The Mudie Project

Skillset was selected by Government to co-ordinate a ground-breaking initiative to increase the take-up of Skillset Professional Qualifications (NVQs). The project aimed to increase the capacity and capability of the industry to deliver NVQs and Skillset was awarded almost £1 million to register, assess and certificate candidates and to recruit and train assessors.

The priority areas identified by the industry were Camera, Grips, Sound, Lighting, Research and Health and Safety. These qualifications were delivered by Skillset approved assessment centres BBC, FT2, Michael Samuelson Assessment Centre and the Northern Media School.

By December 2000, 748 candidates had achieved their qualifications and over 100 assessors had been recruited and trained.

Although there are over 250 assessors trained to carry out this role, many individuals and employers have found the existing procedures cumbersome and bureaucratic.

Nevertheless, in some sectors there are encouraging stories to tell. The aim to 'qualify the workforce' has been supported by the film industry and, in some occupations (typically health and safety critical areas such as lighting and grips), the majority of professionals are now qualified.

In 1999/2000 Skillset piloted a system of Related Vocational Qualifications (RVQs).³⁶ These are based on industry standards but designed to be offered by education and training providers. Twenty colleges, universities and training providers were involved in the pilot, and the RVQs were 'dropped' into a range of undergraduate and postgraduate programmes. The 12-month pilot was a success and over 100 students received a credit for their achievements.

Skillset has made it clear it will continue to work with industry sectors to develop and promote appropriate standards and qualifications, taking industry comments into account to improve and simplify procedures.

AVITG believes one simple and useful development would be to offer individuals the opportunity to have a record, throughout their working lives, of qualifications attained. There would be real value for individuals and employers if a Skills Passport could be introduced, enabling a current record of qualifications to be kept. Such a record could easily be maintained electronically.

Only industry-recognised training course providers would be eligible to 'stamp' the passport. Eligibility could be deemed on the basis of the course leading to a technical certificate (in FE), or receiving industry-based accreditation (in HE), or being recognised by an industry sector.

There will be questions about whether the bureaucracy accompanying such a scheme would justify its benefits, but good courses will almost certainly be able to cope with the administrative demands of such a scheme. It is worth a try in one sector.

RECOMMENDATIONS

Individuals should:

- be prepared to share the cost of relevant training;
- have access to affordable training opportunities at all stages of their working lives.

³⁶ 'Evaluation Report of RVQ Pilot,' Skillset (2000)

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Skillset should:

- undertake a survey to identify all short courses/CPD programmes and update the Skillset/BFI Course Database;
- use **skillsformedia** to publicise ILAs to freelancers and small companies;
- identify priority areas for training.

Governments and public agencies should:

- allocate funds to stimulate freelance training in areas where priority needs have been identified.

The broadcast journalism sector should introduce a pilot Skills Passport scheme with the support of Skillset.

Independent Training Providers should be encouraged to map provision against industry standards.

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Broadcasters' Disability Network (BDN)

Founded in 1997, the Broadcasters' Disability Network brings together the UK's major broadcasters to explore and address disability as it relates to the media industries. The Network makes it easier for members to recruit and retain people with disabilities and to promote and share best practice. The BDN is also concerned with gaining more accurate representation of people with disabilities in the media. The BDN operates under the umbrella of the Employers' Forum on Disability.

The BDN membership include the BBC, BSkyB, Carlton TV, Channel 4, Channel 5, Discovery Networks Europe, GMTV, Granada plc, Pearson, PACT and Turner Broadcasting Systems.

C5 TOWARDS AN OPEN INDUSTRY

The issues identified in **Section B5** have already been the subject of two industry working parties. So AVITG's recommendations are intended to complement those made by the Cultural Diversity Network³⁷ and by the BSAC Committee for Ethnic Minority Employment in Film.³⁸

The need for more reliable statistical information is seen as important in tracking the extent to which the audio-visual industries have succeeded in meeting targets in this area.

It is also recognised that the many informal pathways through which new entrants have entered the industry are of little help to potential entrants with no access to a map or to friends who have travelled the routes before. So moves to widen access to vocational educational opportunities in schools, colleges and universities are welcome. Employers can support these moves by providing bursaries for individuals.

The importance of mentors capable of offering support and advice in the workplace is recognised. The BBC's Mentoring and Development Programme is one approach. Structured career counselling is another way of responding to individual needs; an example is Granada's *Your Career in Granada Media* brochure.

Some correspondents to AVITG stressed the need to 'mainstream' training for people from ethnic minority groups, rather than establishing separate targeted schemes.

Recommendations

Employers should:

- publish employment targets across their own businesses and those with which they have a supply chain relationship. (e.g as well as setting their own targets for recruitment, broadcasters should introduce diversity clauses and monitoring into their contracts with independent production companies);
- participate in Skillset's annual Census to support the on-going collection of information to be used for benchmarking and target setting, and to monitor progress over time;
- encourage effective industry-wide monitoring and tracking mechanisms for those benefiting from the full range of interventions, including access workshops, work placements and bursaries;
- establish and publish targets for recruitment, retention and the progression to senior positions of individuals from under-represented groups;

³⁷ Changing the Face of Television: Cultural Diversity Network Manifesto (2000).

³⁸ Achieving Diversity in the Film Industry: A Report prepared by the Committee for Ethnic Minority Employment in Film under the Auspices of the British Screen Advisory Council (2001).

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Cultural Diversity Network (CDN)

The Cultural Diversity Network is an industry coalition, that aims to modernise the portrayal of ethnic minorities in mainstream programming so that racial diversity on and behind screen reflects today's multicultural Britain. Its members are Carlton Television, ITV Network Centre, the BBC, Channel 4, BSkyB, Channel 5, GMTV, Granada plc, Pearson Television, ITN, PACT, Women in Film and Television, the Independent Television Commission, the Royal Television Society, BAFTA, the Film Council and Broadcasting Standards Commission.

Launched last year, the CDN's Manifesto 2000 sets out the targets, policies and timetables for full inclusion to be achieved across UK broadcasting.

- support the development of **skillsformedia** and the SIF Network to provide accessible and relevant careers information and advice to new entrants;
- encourage the development of targeted mentoring schemes and career counselling within SMEs and for freelancers;
- support the development of an industry-recognised approach to the accreditation of FE/HE degree and postgraduate courses;
- fund bursaries and grants to enable individuals from ethnic minorities to start and continue on industry relevant degree and postgraduate courses;
- increase investment in structured new entrants' schemes which seek to increase the diversity of the workforce in terms of ethnic origin, gender and disability. These should include support for the development of new feeder initiatives that target non-graduates, and of short-term training programmes for graduates to provide fast-track entry into the workforce;
- work with and through existing networks, (e.g. Cultural Diversity Network, Women in Film and Television, the Broadcasters' Disability Network, BECTU's Black Members' Advisory Committee, The Gathering and Skillset).

Skillset and the Film Council should work together to address and respond to the specific recommendations on training and development in the BSAC report *Achieving Diversity in the Film Industry*.

C6 CAREERS: ACCESS FOR ALL

The Opportunity

A recurrent theme during the AVITG consultation process was the inadequacy of good and up-to-date practical information about the audio-visual industries. The demand for careers advice and guidance is significant:

- An estimated 60,000 new entrants seek jobs in the industries each year;
- Currently more than 25,000 people are studying over 700 media-related courses at first degree and postgraduate level at more than 400 institutions across the UK;
- There are over 20,000 students studying a media-related course in FE.
- There are over 5000 students studying media-related courses at sixth-form level in England and Wales;
- The majority of new entrants to the industry come from non-media related graduate backgrounds - the figures above therefore illustrate only a percentage of potential demand.

There are several key stakeholder groups needing and seeking advice and information:

- Potential new entrants into the industry wanting to find out how to get work experience or their first job;
- Careers advisers/teachers in schools, colleges, universities and private careers companies seeking definitive information on job opportunities in the industry to pass on to their clients;
- Parents and relatives wanting to find out about the industry and how to get into it on behalf of their wards;
- Employers who want somewhere to direct the large volumes of unsolicited enquiries they receive for non-existent jobs or for careers information from potential new entrants to the industry;
- Established freelancers and employees seeking information on professional development and skills updating (short courses), career change or progression opportunities.

Current Provision and Resources

Many employers produce extremely useful careers resources that promote their individual company's approach to career development, as well as basic, generic industry information. This is an invaluable resource which could be shared more widely and promoted nationally without having a direct impact on the companies in terms of volume of enquiries. Those interested in getting into media careers often approach careers services, both local and in their schools

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The Radio Academy CD

The Radio Academy recognises the importance of effective pre-entry careers advice and has produced an audio CD, "Getting into Radio" as one of its primary vehicles for providing such information.

This free CD is distributed widely to careers offices and individuals at events and exhibitions, as well as being direct mailed to enquirers. It contains an hour of interviews with current practitioners about how they got into radio, and is divided into tracks covering engineering, sales, admin, news and presentation.

or educational institutions, where they will find such resources as the AGCAS booklets covering Broadcast, Film and Video, the *Occupations* series, and the GAL2 section of the library which covers media careers. Although careers services and teachers may have specialist careers advice skills, they often lack specific and detailed industry knowledge.

Commercial publishers also provide information on both careers and courses related to the creative industries which can be purchased from bookshops or direct from the publishers.

Other sources of information which have a bias or specific focus on careers and training in the creative industries can be found on the Internet. Sites from established information providers with a careers focus include www.yourcreativefuture.org created by the Design Council in conjunction with DCMS; www.channel4.com/brilliantcareers and careers@channel4.co.uk provided by Channel 4; www.bbc.co.uk/essentials provided by the BBC; and www1.sky.com/rfts/Reach for the Sky.

Sites with a training focus include www.skillset.org.uk provided by Skillset; www.ft.org.uk provided by FT2 Training; and www.ts2k.co.uk provided by TS2k (a provider of training for young people in media-related disciplines). Sites directed at particular groups are currently being developed. www.fourall.org already exists and is a talent and diversity database designed to open up opportunities for the employment of disabled people; a similar site will launch under the auspices of the CDN this year.

The BBC, in conjunction with ITV franchise holders and other partners in the English Regions, has been organising a series of highly successful Media Careers Information Days. Skillset has become a major sponsor of these events, and as a result their number and geographical spread has been extended.

Other organisations and industry bodies, e.g. RTS, The Radio Academy, BKSTS and BAFTA, provide career development information and services to range of clients, but most notably to their members.

A One-Stop Service

Although there is much valuable careers information available, it is not always easily accessible. What would be useful and welcome is a one-stop referral and signposting portal to provide advice in a structured and easy-to-use way. Any such service would need to ensure it was not replacing or duplicating provision, but merely helping to promote and signpost potential users.

A number of issues have hitherto prevented a nationwide approach to providing the service needed:

- Lack of coordination between sectors;

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- Lack of strategic distribution of information on employment and skills needs;
- Duplication of resources in terms of industry and public investment;
- Significant gaps in specific job/sectoral information;
- Confusion about access points and who provides which services;
- The cost of providing good specialist information;
- No single access point for the information available.

AVITG agreed that work should be undertaken to build on the experience of Skillsbase the careers service initiated by BECTU, to develop a definitive, industry-backed single reference point for careers information, advice, guidance and support.

'Seed-corn' investment was identified by industry as necessary to begin the development of a range of products and services. Through the identification and successful bidding for public funding from ESF and the Union Learning Fund, a solution to the problems of inadequate information is currently being developed.

The Proposal

skillsformedia is a partnership initiative between Skillset and BECTU. It will be an online and offline service to provide careers and training information, advice and guidance for students, new entrants and people currently working in the media industries. It will also provide a resource for supporting organisations, such as learning providers and careers advice agencies.

- The online service: **skillsformedia.com** will provide information, advice and links to a wide range of media careers information resources, including case studies, practical hints and tips, job descriptions, career planners and CV wizards. The site will have two main navigation routes :
 1. 'Getting In', aimed predominantly at new entrants;
 2. 'Getting On', aimed at industry professionals seeking to update skills, change direction or gain promotion.
- The offline service: **skillsformedia direct** will provide face-to-face careers and training guidance to experienced media industry professionals through a one-to-one careers advice service.

Overall, **skillsformedia** will operate as a UK-wide service with a distinct and separate identity in the regions and nations. It will:

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- provide one-to-one training and careers guidance to people throughout the UK;
- provide careers information and advice on demand through a telephone advice line to new entrants, established freelancers and employed clients;
- develop and train industry careers advisers and ensure that they achieve the appropriate NVQs in advice and guidance;
- develop and run business and marketing skills workshops for freelance workers;
- achieve the Guidance Council's Quality Standards for Learning and Work;
- develop effective working relationships and appropriate referral arrangements with industry employers, learning providers, regional and national training consortia and careers advice agencies.

AVITG has supported work to develop **skillsformedia** during the past 12 months and endorses the proposals that have been developed.

Recommendation

- **skillsformedia** should work with and through employers, industry bodies and other public agencies to establish appropriate partnership arrangements to provide a promotion, signposting and referral service for publicly available employer-produced careers resources.

SkillXchange

SkillXchange, a BBC Training & Development team, grows skills for the broadcast and media sector. As well as running trainee and attachment schemes, it provides skills development opportunities across diverse communities through partnerships with external organisations.

Skillxchange:

- co-ordinates the BBC's 20 trainee schemes, covering up to 400 new entrants;
- manages the BBC's scheme providing internal and external secondment opportunities.

As well as promoting collaborative networks, skillXchange reflects the BBC's role in supporting learning and skills, growing talent and sharing skills across the audio-visual sectors.

C7 THE ROLE OF EMPLOYERS

In today's market, employers' responsibilities for tackling the skills needs of their sectors cannot be confined to their own workplaces. Employers have a vested interest in the competitiveness of their sector as a whole. Consequently, they can be expected to take an active role in meeting its training needs. This may take a range of forms, from involvement in NTOs to contributing to industry-wide levies.

The established terrestrial broadcasters have already made a significant commitment to both in-house and industry-wide training, underpinned in the case of ITV, Channel 4 and Channel 5, by licence obligations. However, there are many smaller companies in other industry sectors, reliant on the skills of short-term contract and freelance staff, have made no such commitment.

Public Sector Broadcasters

The extensive scale of the BBC's current training and education activities is described in **Section B2** but the BBC accepts that it should do even more to train the industry in the UK as a whole. Following discussions between AVITG and the BBC, the BBC has decided to extend its current commitments and will:

- open journalism and new media training to the market in the same way that all other BBC training courses have been available in recent years;
- increase the funds available for training of freelancers by channelling additional subsidy directly to the BBC's training departments to carry out such training, an additional £100,000 in 2001/02;
- pilot access for the industry to its in-house interactive learning system from 2002;
- remove from the BBC's business units the responsibility to fund S/NVQ qualifications for their staff, and fund this on a corporate basis;
- review new entrant trainee schemes to provide more trainee opportunities and align them with industry standards.

Channel 4 too plans a range of new initiatives, including:

- developing a core management skills programme;
- introducing improved access to competence-based programmes with national accreditation;
- opening up and sponsoring places on existing in-house programmes to freelancers, suppliers and customers.

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S4C is producing a new bilingual website to link with **skillsformedia**. It also plans to work with Cyfle and independent producers to provide fast-track training for producers and to develop closer links with vocational education providers in Wales.

ITV and Channel 5

The ITV regional companies have training and education commitments built into their licences. They increased their overall provision in 2001, as described in **Section B2**.

Looking ahead, they have agreed to extend their current commitments in the following ways:

- identifying further ways of opening training courses to freelance and contact staff, particularly in generic areas such as Health and Safety training;
- developing close links with educational establishments, regionally and nationally;
- actively supporting regional initiatives that support freelancers and new entrants, like careers fairs and the Skillset-approved regional consortia, including establishing new structures where none yet exist;
- taking further initiatives, including bursaries, work experience schemes and traineeships, to make opportunities in ITV accessible to all;
- using the strengths of the ITV network to share best practice across the regional companies.

Channel 5 has increased its training commitment in 2001. Looking ahead, the channel intends to develop direct links with vocational media education providers, to include freelancers and SMEs in training, to promote diversity and disability awareness, and to support more careers fairs in future.

Looking ahead, it is hard to be optimistic that current levels of support for training and education can be maintained by ITV and Channel 5 as broadcasting deregulation gathers pace.

It is highly unlikely that the good practice of commercial analogue television will automatically be carried over into the digital world without some form of regulatory involvement. Given the important role played by broadcasters in funding cross-industry bodies such as Skillset, the FTF and the NFTS, any decline in funding by licensed broadcasters could have an industry-wide impact. Proposals for addressing this are made in **Section C10**.

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Investors in People

Channel 4 committed to becoming an Investor in People in 1996, seeing the standard as a useful framework to develop individual potential in line with business goals.

A series of briefings and workshops led to the introduction of training and development reviews with all staff, the objective of which was to assist the development of the individual to undertake their current jobs as effectively as possible in support of business, departmental and individual goals.

The benefits have been that internal communications have improved, staff now have greater commercial awareness and there is a sense of ownership of corporate objectives. Channel 4 achieved the standard in September 2000.

Other Television Broadcasters

Satellite and cable broadcasters train their own employees, but play little part in implementing training policies for the wider industry sectors. Discussions are beginning between Skillset and individual companies, such as BSkyB, to address this.

If the proposals of the 2000 White Paper, *A New Future for Communications*³⁹, are adopted, support for training will be included within the first tier of regulation for all broadcasters.

Commercial Radio

The largest commercial radio companies have well-resourced and structured training schemes. Smaller local stations offer invaluable hands-on experience but few formal training opportunities.

Skillset and Radio Academy have established a Radio Forum to discuss sector-wide training issues.

Independent Producers

Independent television production companies that belong to the trade association, PACT, support the IPTF by applying a voluntary levy within the budgets agreed with broadcasters. The ceiling of £6250 has not been increased since the levy was introduced 8 years ago, and the AVITG suggests that the IPTF should review the current arrangements.

Most producers make this voluntary contribution, and the IPTF has in principle committed a sum of £280,000 over the next three years to deliver focussed business development training to independent producers.

However, there is varying practice among broadcasters in providing information and support for collecting the levy. There are no mechanisms for collecting the levy from cable and satellite broadcasters other than Discovery. Channel 4 provides the most comprehensive service in this area. TAC, as described in **Section B2**, also operates a voluntary levy that is fully supported by S4C.

AVITG sees no reason why all broadcasters should not offer similar levels of support as part of future licensing obligations (**Section C10**).

Most independents do not keep records about the extent of training provided for employees, but there are good examples of small companies working together to tackle an identified skills gap, such as the Independent Companies Researcher Training Scheme managed by FT2 on behalf of a group of sponsoring companies.

³⁹ 'A New Future for Communications.' Communications White Paper, DTI, DCMS (2001)

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Channel 5 Management Training Programme

Channel 5 has had great success working with Ashridge Business School to deliver a range of management training. Launched eighteen months after the channel went on air, the courses were aimed at young managers who needed support in developing their abilities to manage teams and to gain a broad knowledge of business functions. A three week course for more senior managers and a new one week course for middle managers have now been developed. Channel 5 has seen noticeable benefits back in the working environment, ranging from managers working better together, to better communications and better team working.

Film

In one sector, film, as a result of a government-sponsored Film Policy Review in 1998 and a high level of ministerial focus, there has been a successful initiative to introduce a voluntary levy on productions. The SIF has raised over £1 million since its inception in 1999.

Other Companies

The majority of the workforce in the audio-visual industries, outside the large film and television companies, is employed in small companies, usually with an ad hoc approach to training.

AVITG sector reports tell similar stories. Small radio companies, digital content producers, computer animators, television distributors all report little training provision in companies with under 25 employees. There are important exceptions and different approaches within each sector, but training and education are rarely a priority in a small company where one person may have to cover a range of functions.

The advertising and corporate sectors - about which very little labour market information exists - contribute minimal amounts to industry training, despite depending on the same skills and the same people as the broadcast and independent production sectors.

The industrial mechanisms that have ensured a steady supply of skilled people entering the workforce from companies such as the BBC and ITV, with a long-term commitment to training, are not necessarily set in stone for the digital age. The responsibilities for industry-wide training need to be spread more widely.

However, small companies have often shown imagination in developing constructive links with the post-16 education sector, in addition to providing regular work placements and guest lectures. For example, Victoria Real, the Brighton-based digital content production company, is working with the University of Brighton on a Digital TV MSc. Uden Associates and Leeds University have an ongoing partnership.

Several recent Government reports have recommended closer links between business and education. Initiatives such as HEROBIC, TCS and Centres of Enterprise now provide proven partnership models.

Trade Associations

Where trade associations exist within the audio-visual sector, they provide a clear communication channel and a forum for discussing and supporting training and skills development. PACT, ASPEC and IVCA have all put training high on their agenda. Skillset, the NTO, can work particularly effectively if it

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is working alongside a committed Trade Association. In one area, post-production and other facilities, Skillset should more actively work to support companies that want to develop an industry-wide training agenda.

Other Initiatives

Other opportunities exist to enable employers to learn from and implement best practice. Recent Government policies have encouraged a range of measures to stimulate an awareness of the value of sector training and to spread good practice. These include:

- Investors in People
- Learndirect
- National Training Awards
- People Skills Scoreboard.

Again, size matters: many companies are too small to be able to spare even the limited resources needed to engage with this agenda on their own. Industry sectors such as independent television production, broadcast journalism and, more recently, television marketing and distribution, benefit from having representative trade bodies capable of taking a lead in tackling sectoral issues.

Recommendations

The BBC should:

- complete the process of making its training facilities and software open to relevant industry sectors on as comprehensive a basis as possible by the autumn of 2001;
- explore, as soon as possible, the feasibility of setting up an online training facility for audio-visual industry workers.

Other companies and institutions should, where practicable, open their courses and educational materials as widely as possible by the autumn of 2002.

Broadcasting employers should begin discussions now with Skillset and industry regulators on a range of measures to improve training and vocational education for freelancers (see also **Section C10**) at affordable prices.

Broadcasting employers should begin discussions now with ITC, the Radio Authority and Skillset to develop an appropriate methodology for the collection of information on training activity and investment.

The IPTF should review the current arrangements regarding investment from the independent television sector.

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Skillset should support a sector-wide training strategy for workers in post-production and other facility companies.

The IVCA, APA and advertising agencies should immediately begin discussions with Skillset and government about developing skills strategies to be put in place by the beginning of 2002.

Cable and satellite broadcasters and commercial radio companies should actively support Skillset and its work.

Companies in receipt of public funding or tax benefits should be required to participate in cross-industry training activity, with and through the National Training Organisation, as a condition of receiving the benefit.

Employers should work with Skillset to support identified vocational centres of excellence.

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C8 THE TRADE UNIONS' ROLE

In the audio-visual industries, the unions⁴⁰ have recognised that developing an effective skills strategy is vital to the future prosperity of their members. Central to that strategy is the need for a new social partnership model: working proactively with individuals, employers, employers' associations and NTOs to become practical champions of a lifelong learning culture.

Both individually and through the Federation of Entertainment Unions, trade unions can contribute to the development of strong training infrastructures. These can ensure that their members have the skills and knowledge to enhance employability and career development and to sustain the productivity, competitiveness and cultural success of the sectors in which they work.

Every sector of the industry is now heavily reliant on a flexible freelance workforce. The unions represent performers, screenwriters, technical and production staffs and journalists throughout their working lives. They have shown a growing commitment to playing a constructive and continuing role in the development of an agreed training agenda for the industry. In particular, they already play an active part in the development of strategy by Skillset and the national and regional training consortia.

There is a long-standing and mutual acceptance by both sides of industry that training is an area for collaboration. This creates the possibility of progress towards formal learning agreements in the workplace.

The unions see such agreements encompassing all or some of the following key ideas:

- A broad policy statement which sets out the agreement's background, scope and aims;
- A description of how the union and the employer will work together to promote and provide lifelong learning opportunities;
- Time-off arrangements and facilities for workers undertaking training and for Union Learning Representatives;
- Targets for annual hours per employee for undertaking learning;
- Information on the company's actual and projected annual training investment;
- Agreement on the minimum annual funding available to each worker for training;

⁴⁰ Broadcasting, Entertainment, Cinematograph and Theatre Union (BECTU), British Actors' Equity Association (Equity), Musicians' Union (MU), National Union of Journalists (NUJ), Federation of Entertainment Unions (FEU).

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Trades Unions Agreements on Training

BECTU, NUJ and AEU all have long-standing agreements with the BBC that 2.5% of salary budget will be spent on Training and Development. In 1998 the three unions reached a further agreement with the BBC that related directly to staff facing redundancy. This agreement provided for an extra window of opportunity for extended training and re-deployment for 5-6 months, depending on the nature and scale of the redundancies.

During this period, individuals who are facing redundancy are able to identify both internal and external courses costing £500 - £1000. This entitlement to training, which must fulfil identified criteria, is then funded by the BBC to equip those staff for future employment.

- Details on how opportunities for training and development will be accessed by non-traditional learners, in particular under-represented groups and casual/freelance/contract staff.

AVITG recognises the potential value of such agreements. The unions have expertise and experience which many employers will find helpful. By ensuring that their members are consulted on and contribute to policy discussions, unions are well placed to publicise, promote and encourage the industry's lifelong learning agenda.

Working with the TUC's regionally based Learning Services units, the unions have been encouraging a systematic response to the basic skills deficits identified by the Moser Report.⁴¹ These developments are closely linked to the development and training of Union Learning Representatives in areas of permanent employment. Ensuring that lifelong learning and the new skills and confidence it generates are accessible to all sections of the community (and particularly to those under-represented in the audio-visual industry's workforce) remains a central objective for the unions.

The unions have played an important role in the development of Skillset's extensive suite of qualifications covering key occupations, providing employers with credible guarantees of competence and skill. Their coordination of input from industry professionals has helped to ensure the practical relevance of the structure and content of the qualifications. This has been important in convincing a (sometimes) sceptical workforce of their value.

Labour market research provides hard data on the structure of an industry, its skills patterns and its priorities for investment. By providing access to their membership, the unions have demonstrated that they are committed to the objective identification of skills requirements across the industry. They are active partners in Skillset's annual Census.

Continuing professional development is recognised by Government as central to lifelong learning strategies. Advice, information and guidance to individuals on how best to develop their careers, and on where, when and how such opportunities can be accessed, are essential if individuals are to be reintroduced to learning.

BECTU was responsible for developing Skillsbase, a training and careers advisory service for freelance workers in the audio-visual industry. It has been a conspicuous success. This pilot scheme is now being developed in partnership with Skillset as part of the overall **skillsformedia** (see **Section C6**).

The National Union of Journalists (NUJ), the Musicians' Union (MU) and Equity are also actively engaged in the development and provision of a range of front-line advice and guidance projects.

⁴¹ 'A Fresh Start: Basic Skills for Adults' Moser. (March 1999)

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NUJ

The National Union of Journalists has, over the last three years, been delivering high quality training in volume for its members. The constant speed of developments within the industry, particularly in web publishing and new technological processes, make training a critical element of the NUJs work.

The union's commitment to Lifelong Learning, and the needs of its members to update technical ability and skills in an on-going way, have seen the opportunities grow from a basic 2 day QuarkXpress course to a portfolio of over a dozen, other opportunities. With the addition of their own training suite, the portfolio of opportunities for its members is set to grow.

Unions have a special role in initiatives of this kind, particularly for freelancers who cannot easily access information and guidance through employers. As a means of delivering a coherent and bespoke training message to individuals within the audio-visual industries, both permanently employed and freelance, these initiatives are essential.

Unions have been closely involved in the development of specific training provision for their members and in encouraging the industry investment that makes it possible. In addition, they have been involved alongside employers in a number of joint new entrants' training schemes across the regions and nations of the UK, and in the industry's central provision of training through Skillset's Investment Funds. The unions believe that the cost of vocational training and development, for those in and out of work, should be borne primarily by employers. They identify a lack of strategic investment over time by some employers as the reason for persistent skills shortages and for the lack of structured career development opportunities across the industry. Where freelancing and casual working predominates, the unions believe employers can too easily evade their responsibility to invest in skills.

BECTU in particular takes the firm view that training investment cannot be optional, that voluntary investment is neither equitable nor economically sustainable. While strongly supporting such innovations as the SIF, BECTU is committed to the introduction of a statutory training levy as the most effective mechanism to ensure adequately funded and structured training.

Notwithstanding this, the unions acknowledge and are actively pursuing the learning benefits that European, national, regional and local public funding opportunities can provide. They have helped to generate substantial infrastructural training investment through the European Social Fund and the TUC's Union Learning Fund, which Government has recently increased to £27,000,000. They also recognise that freelancers should be encouraged to finance their own training provision, at least in part. They are encouraging the take-up of Individual Learning Accounts by their members.

Recommendations

Unions should:

- invite Skillset and employers to form a joint working party to assist in drafting a model Learning Agreement between employers and unions;
- play a leading role in the provision of effective and current careers advice and mentoring services, open to all;
- be encouraged to champion the development of lifelong learning in the workplace, through Union Learning Representatives.

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C9 SKILLSET - THE NATIONAL TRAINING ORGANISATION (NTO)

Background

The Government has made clear that skills development should be at the heart of the economic development agenda. In the UK economy as a whole, their view is that there are too many skills gaps and skills shortages.

To focus employers and unions on addressing this, the DfEE (then a UK-wide department) established the National Training Organisation Network in 1997. There are currently 72 NTOs. NTOs are employer-led strategic bodies recognised by government as having:

‘a pivotal role and a unique responsibility for defining their sectors’ skills agendas, in securing widespread commitment to raise the relevance, quality and amount of training provided and to regularly review proposals in achieving these goals’⁴².

Since the launch of the network, the devolution agenda has moved on. NTOs now:

‘have a crucial role in providing an essential link between employers and the education and training systems in each country’.

NTOs are seen as making a distinctive contribution to the skills agenda in four ways:

- **Needs** - by clearly and accurately identifying and communicating the current and future skills needs of their sector;
- **Action** - by promoting action as skills by employers and other partners, setting standards, ensuring the availability of high quality qualifications and learning pathways and spreading good practice;
- **Investment** - by working with employers in their sectors to support and promote investment in skills;
- **Audit** - by actively auditing and reporting sector progress and skills on a regular basis⁴³.

Skillset, the National Training Organisation for Broadcast, Film, Video and Interactive Media

Skillset was launched by the industry in 1993 and became one of the first NTOs in 1997. Skillset has been successful in harnessing the commitment and enthusiasm of industry leaders to drive forward the training agenda.

⁴² NTO Prospectus, (2000)

⁴³ ‘Building a Stronger Network: Developing the Role of National Training Organisations’ Consultation Document, DfEE, (2001)

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Unusually within the NTO movement, Skillset has worked with industry sectors in different parts of the UK to establish a network of National/Regional Training Consortia. These have become Skillset's chief partners in co-ordinating the industry's requirements for training and skills in different areas. In many cases they have had notable successes (for examples, see **Section D**), but all have suffered from a lack of consistent core funding. This has been a constant theme in evidence that AVITG has received from the Consortia Network.

Following the recognition process that Skillset had to undertake in order to achieve NTO status, a "kitemarking" process was developed to strengthen relationships between Skillset and the Consortia partners. The kitemark devolved certain parts of Skillset's NTO responsibilities to the Consortia Network (e.g. labour market information, skills foresight, relationships with FE/HE, implementation of VQs). In return, it enhanced their status when working with public agencies. This was seen to be of importance as the devolution of skills and learning strategies and investment decisions continued to develop.

Not every organisation within the Consortia Network has achieved the kitemark. The system is currently being reviewed by Skillset and the Consortia Network in the light of experience to date.

The Future of NTOs and Skillset

As a result of the fundamental changes taking place in post-16 education and training across the UK, Governments have engaged in a wide ranging consultation and review on the future role of NTOs. The National Skills Task Force in England, the Welsh Skills Taskforce and the key agencies in Scotland and Northern Ireland agree that the current network has been patchy in its delivery of services and ill-equipped to deliver the strategic vision which Government requires.

To quote from the consultation document⁴⁴ :

'The consultation is about change. NTOs have to become more professional in their capacity to analyse skill needs; adopt a higher profile with employers; have a more immediate and measureable impact on the quality of skills in their sectors and be more influential in the wider education and training sectors in the different nations of the UK. We believe the answer lies in a smaller and stronger network better able to secure and use resources to achieve these goals...the network must restructure for maximum impact on sector skills while working with the distinct education, training and economic planning arrangements in each country'.

AVITG welcomes the overall thrust of the consultation document. However AVITG has questioned a core proposal of the consultation paper as it relates to the audio-visual industries that NTOs should cover wider industry sectors in order to be able to act more effectively.

⁴⁴ 'Building a Stronger Network: Developing the Role of National Training Organisations' Consultation Document, DfEE (2001)

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Skillset has spent several years building a strong relationship with the media industries it serves, already a disparate group of sectors with their own traditions and employment patterns (see **Appendix B**). The support of senior industry figures is crucial for its success. The more remote the executives of an NTO like Skillset become from their industry sectors, the less likely the NTO will be able to play a key role in developing strategy. Bigger is not necessarily better.

AVITG welcomes the recognition that NTOs must be UK-wide bodies, albeit ones that are structured in such a way as to effectively deliver their role and responsibility in partnership with local industry and devolved administrations and their agencies.

AVITG welcomes the clarification that NTOs are strategic bodies and should not be directly involved in the day-to-day delivery of training. There is a particular need for Skillset to clarify its role in relation to the Consortia Network and to ensure the separation of strategic and operational roles.

However, AVITG recognises the multiplicity of different types of training and vocational education that exist to support the development of skills and talent in the industry. Resources permitting, it believes Skillset, working with other representative industry bodies, has a key role to play in monitoring the overall quality of external training courses for the industries.

The key issue is NTO funding. AVITG urges UK governments to co-ordinate effectively over the appropriate levels of strategic investment required to deliver the service expected of Skillset. The current proposals for increased funding are inadequate. It is also unclear if they apply to England only or across the UK.

Skillset will be unable to deliver its key role unless the issue of core funding for core activities is addressed. Other key agencies in post-16 training and vocational education are wholly resourced by Government. NTOs, nationally and regionally, provide crucial links between Governments, public agencies and employers.

Skillset has close and current links with most of the industry sectors it represents. In 2001 over £1 million was invested in Skillset's core activities, although some industry sectors have yet to accept a responsibility to support industry-wide training priorities. Without a significant increase in Government funding there is no guarantee that this level of industry investment can be made available on an on-going basis.

Without adequate partnership funds from Government, Skillset and its Consortia Network will be incapable of performing their current responsibilities adequately, let alone take on additional roles.

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Recommendations

Governments across the UK should:

- co-operate and co-ordinate to invest strategically in Skillset, the NTO for the audio-visual industries, at a level appropriate for the core tasks required of the NTO;
- encourage sectors that currently do not provide core funding for Skillset's work to do so.

Skillset should:

- strengthen its presence and identity in Scotland, Wales and Northern Ireland in response to the devolution of the learning and skills agenda in the UK;
- clarify with the Training Consortia the future role they should play in relation to Skillset;
- examine its activities to use its core resources in the most effective manner and, in partnership with the Consortia Network, to encourage appropriate levels of both public and industry investment;
- work closely with other NTOs through the relevant NTO groups and on other areas of specific overlap such as the Digital Content Forum;
- as soon as resources permit, ensure arrangements are in place to monitor the quality of external training courses in industry sectors.

Independent Production Training Fund (IPTF)

PACT manages the IPTF which collects funds from the independent production sector by means of a levy on television production. A proportion of the funds collected are donated to Skillset's Freelance Training Fund where they join contributions from the broadcasters to help subsidise a range of training initiatives across the UK. The IPTF also supports PACT's in-house short courses for its members which focus on business, legal and copyright issues and events like the recent Runners Day.

C10 WHO PAYS?

Introduction

This report makes a number of recommendations. Each comes with a cost of implementation. In many cases this cost can be met by allocating existing funds in a different way. This applies particularly to the recommendations for building closer links between the audio-visual industries and the education system. Nobody knows precisely how much is spent each year on vocational education and training at schools, colleges and universities, but it is certainly by far the largest single investment in training and education for the overall industry. The more employers take an interest in what is happening in the education system, the more likely it is to be relevant to their needs. Providers of vocational education and training made it clear during the AVITG consultation process that they would welcome such involvement with open arms.

However, many recommendations - such as an additional audit role for Skillset, or running short courses for programme distributors - will only happen if new funding can be identified. It was not part of AVITG's original remit to identify where additional training funding should come from, but it would be absurd not to make proposals to help our recommendations to be implemented.

What is the problem?

Funding training is an investment in generating competitive advantage. Yet the advantage is often for an industry sector as a whole over a period of time, rather than for an individual employer faced by day-to-day management problems. But industries that do not understand the need for change become everybody's problem when they fail. Under-investment is as much a problem in the audio-visual workplace as it is in schools, hospitals and rail networks.

Members of AVITG come from the private and public sectors, from old and new media companies, from regulated and deregulated industries. Whatever their differences, they are unanimous in identifying a current and future problem of developing effective mechanisms for skills development. In particular, training and education opportunities for freelancers and short-term contract workers are limited when they are in work, hard to afford when they are out of work.

This issue has been addressed in some industry sectors. Many of the large broadcasters have impressive records in training both their own workforce and the industry as a whole. With the support of the major terrestrial broadcasters, voluntary levies have been introduced for independent television productions. This good practice is the product of a regulated past, where licence holders were expected to make firm commitments about training and other matters.

There has not been a similar focus elsewhere. Other companies have had little incentive to accept a role as an industry-wide trainer.

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The many smaller companies that have emerged in sectors as diverse as animation or corporate video are, for the most part, too small to support an in-house training infrastructure and too busy to get involved in cross industry initiatives.

Looking ahead, employment structures in the audio-visual industries will remain fluid. Traditional broadcasters will need to emulate the flexibility of their competitors to stay competitive. In these circumstances, it would be foolhardy to believe the broadcasters - on whose support industry-wide initiatives such as Skillset, the NFTS and FTF depend - will automatically continue funding industry training and education on the current scale as the benefits they receive from their licences diminish.

Are Industry-Wide Levies the Answer?

Levies, compulsory or voluntary, are the usual response to training needs. In other countries, a variety of levy mechanisms exist to support and finance vocational education and training (VET). There are statutory levies of varying forms in several European countries, ranging from 0.25% of payroll in Belgium to 2.8% of payroll in the Netherlands.

Revenue-generating levies on employers are usually administered through government. Although the levies are compulsory, the benefits companies receive vary from nothing to a substantial amount of free training. A major disadvantage of this approach is that employers feel distanced from the process, regarding it as another means of tax collection, like national insurance. Levy-exemption schemes are another way of boosting training provision. These allow firms that provide a stipulated amount of training to be exempted from levy. This does not address wider sectoral issues.

In France a large amount of initial vocational training takes place in the education system. A 'taxe d'apprentissage', set at 0.5% of payroll, relates to apprenticeships for young people between 16 and 25.

In the United States a market-led approach dominates, with the federal government's role restricted largely to providing a legal framework and setting standards. Different states have different systems. Levies are focused on the employee and are often collected by the trade union.

In Germany, as in Britain, there are no revenue-generating levy arrangements, but compulsory levies do exist, with employer support, in the construction sector.

Differences between national systems make the export of policies difficult. The Australians tried to introduce a system based on the French approach, but failed to take account of the cultural differences between the two countries.

SECTION C - TACKLING THE SKILLS AGENDA

In Britain in the 1960s Industrial Training Boards were introduced, with all-party support, to improve the quality and quantity of training. A statutory obligation to train was introduced, paid for by levies on employers. By the 1980s, Training Boards and levies were seen as bureaucratic and were scrapped, except in construction, engineering and fishing.

The situation in Britain now is that any compulsory levy has to be agreed by the industry sector involved. So, the surviving levies are backed by statute with the support of industry.

The National Skills Task Force chose not to reopen the debate in its recent report :

‘The Task Force has debated whether the framework we recommend should include a statutory obligation on employers to meet some form of minimum training requirement. Some members remain committed to the view that, without such an obligation, we will not succeed in delivering the full increase in adult learning which is needed. Other members were convinced that the new framework, together with the range of practical measures reinforced by incentives, can deliver the necessary progress and that a further statutory requirement is inappropriate’ *Towards a National Skills Agenda*.⁴⁵

The same discussions took place within AVITG. Both the IPTF and SIF (**Section B2**) are successful voluntary schemes to support training for freelancers, covering television production and film respectively, but other sectors have no schemes to support industry-wide training investment.

What's Right for the Audio-Visual Industries?

AVITG was unanimous in agreeing that the action to tackle skills gaps and shortages should be determined by each industry sector in response to its particular needs. It noted that, in one sector, the film industry, a detailed training and education strategy was already being introduced as a direct result of the Government-led Film Policy Review. Part of this strategy was the introduction of the SIF (**Section B2**).

The film industry experience suggests two guiding principles for industry sectors to take into account when formulating a training strategy:

- the training levy ‘stick’ was accompanied by lottery funding and tax break ‘carrots’. Government can influence training and education provision where it already has an interest in an industry sector;
- representative industry-wide inquiries can play a crucial role, supported by the NTO, in developing training strategies. The recommendations of the Film Policy Review Group are now being followed up and implemented by Skillset through SIF and by the Film Council.

⁴⁵ Third Report of the National Skills Task Force, p.46 (4.4), DfEE, (2000).

SECTION C - TACKLING THE SKILLS AGENDA

The operation of the IPTF is also instructive. Despite areas where the existing scheme could be made to work better (**Section C8**), the fund has involved both terrestrial broadcasters and independent television producers with the active support of the BBC and the ITC, the current regulators. There is no reason why OFCOM should not ensure the maintenance of an effective scheme in the digital future if support for training is included in the first tier of regulation, as the 2000 White Paper *A New Future for Communications*, proposes.

As discussed in **Section B2**, AVITG believes regulators, present and future, have an important role to play in ensuring that support for training is underpinned by licence requirements.

Governments should also publicise more effectively the existing incentives available to employers and individuals who invest in their training. AVITG supports the Chancellor's intention to strengthen these.

'As announced in Budget 2001, the Government is prepared to consider what more it can do, as part of its joint responsibility with employers and employees, to ensure that there is opportunity for continued training for all in the workforce, especially to attain up to NVQ level 2. One possibility is on the model of tax credit, but other options are being considered.'⁴⁶

Consideration should be given to how such a mechanism might be used as a way of providing industry-wide incentives to employers to contribute to collective skills investment funds. This would particularly encourage SMEs to coordinate their activities.

New ways of supporting industry-wide training and education may need to be identified in the digital world. One initiative, which AVITG noted with interest, has been operating in Canada for some years⁴⁷. When broadcasting licences change hands, the regulator can request a 'significant benefit' to be proposed and implemented by the acquiring company. This is the same principle as a planning gain. The outcome is that a variety of initiatives, including training programmes, have been introduced, paid for and determined by companies acquiring licences after a negotiation with the CRTC, the Canadian broadcasting regulator.

Such a scheme has the merit of not creating a new bureaucracy and of presenting an imaginative solution to the problem of how some of the good practices of the current public service broadcasting framework might be funded in the digital age. While licence fee rents remain, a licence fee transfer payment along the lines of the Canadian model would be an unnecessary additional burden, but in the years ahead OFCOM may wish to consider replacing or supplementing annual licence fee rentals with one-off payments.

⁴⁶ Productivity in the UK: Enterprise and the Productivity Challenge; HM Treasury (June 2001)

⁴⁷ Canadian Broadcasting Regulatory Handbook, 2000: pp527-528

SECTION C - TACKLING THE SKILLS AGENDA

AVITG also noted that Government has already shown, in an area such as television distribution and marketing, the ability to kick-start sectoral development by support, encouragement and a little funding. Even where all the stakeholders have a common vision, industry sectors sometimes need a stimulus.

Nationally and regionally, new development agencies have the task of stimulating economic development by seed-corn investment in the industries of the future. In many regions and in the nations, the audio-visual industries have been identified as key to future growth. Core funding for training consortia should be a priority. Cross-industry education and training need full-time champions. Overall, AVITG noted carefully the words of the Secretary of State for Education and Employment in his response to the report of the National Skills Task Force:

'I do not propose, and the Task Force did not recommend, the introduction of a stronger statutory framework or obligation on employers to train. I believe that, in a modern economy, we must look at a more imaginative set of levers that help ensure employers make the right decisions about the importance of skills and developing people to their business.

As part of this I am ready to use existing powers, in consultation with my ministerial colleagues in Scotland and Wales, to provide statutory backing for proposals in any sector for collective skills investment, provided the social partners agree there is clear evidence of a skills deficit and this is the right way forward. This already happens in the construction and engineering industries...'⁴⁸

AVITG believes each sector will wish to examine whether it is in its interest to develop industry-wide training policies and to seek statutory backing to ensure both the costs and the benefits of implementation are shared across the sector.

In the meantime, what other 'imaginative set of levers' is appropriate for the audio-visual industries?

Recommendations

Education and training should fall in the first tier of OFCOM's* regulatory structure.

In the radio and television sector, OFCOM, in conjunction with Skillset and other relevant industry organisations, should:

- monitor training and education investment made by all licensed broadcasters, with particular emphasis on the investment made to support cross-industry strategies and the training and development of freelancers;

⁴⁸ DFES: Opportunity and Skills in the Knowledge-Driven Economy. DFES: Opportunity and Skills in the Knowledge-Driven Economy.

SECTION C- TACKLING THE SKILLS AGENDA

- as part of the monitoring process, introduce a common methodology for assessing the extent, quality and impact of education and training provision that has been agreed with broadcasters;
- agree minimum levels of contribution by broadcasters to the training and development of freelancers, to be made public as a condition of licence. It may be appropriate to consider the public sector broadcasters as a separate group for the purpose of setting levels of contribution;
- enable licensee companies to provide additional external training and education support at regional or national level, focused on the needs of freelancers and small independent producers, through reliefs on payments levied on advertising revenue;
- require all broadcasters to publish their training and vocational educational investment and provision on an annual basis.

Television broadcasters should provide IPTF with relevant information about independent productions commissioned and actively support the collection of the IPTF voluntary levy.

Governments, in addition to the recommendations outlined in **Sections C1, C2, C3, C4 and C9**, should:

- strengthen the tax breaks and credits available for those companies that invest in training their staff and freelancers;
- require companies in receipt of public funding or tax benefits to participate in cross-industry training with or through their NTO;
- bring together top management, the NTO and trade associations in sectors where no skills strategy has yet been agreed to consider how and when effective long-term investment strategies can be put in place;
- work with the NTO to focus strategic investment on the local needs of industry sectors, as articulated in Workforce Development Plans;
- track their investment in training on a sector-by-sector basis to enable an accurate assessment of strategic investment.

The performance of the Skills Investment Fund to date should be monitored as part of the on-going process established by Skillset and DCMS. The next formal review should take place in December 2001, as planned.

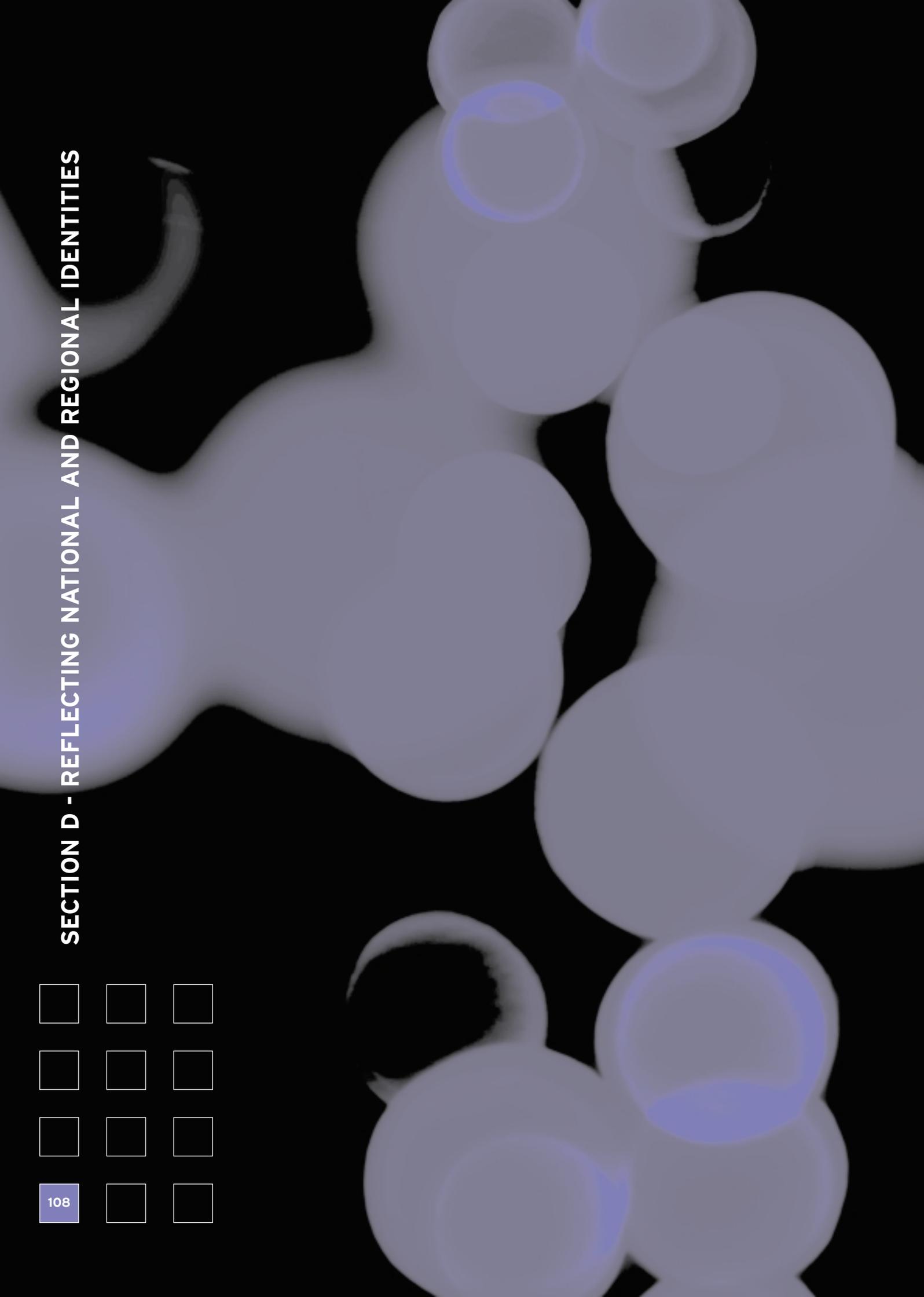
Individuals should have the right to affordable and relevant training at all stages of their working lives, whether in or out of 'work'.

*[OFCOM has yet to be established. There is no reason why existing regulators should not be asked by Government to act jointly to implement proposals before OFCOM is set up.]



SECTION D - REFLECTING NATIONAL AND REGIONAL IDENTITIES

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SECTION D - REFLECTING NATIONAL AND REGIONAL IDENTITIES

D1 SCOTLAND

Background

Over the past decade Scotland has seen growth in the audio-visual industries lag slightly behind the rest of the UK.⁴⁹ Within the creative industries cluster in Scotland software and publishing dominate, with the potential to underpin the development of a successful digital creative content sector.

Devolved government has been a driving factor in increasing collaboration between the public sector and its agencies for the benefit of industry, although the process has been gradual. The Scottish Executive has emphasised education and lifelong learning as key areas. In addition, the audio-visual industries have been identified as central to the creative industries cluster. However, the training and education agenda has not yet been harnessed to channel major investment into developing strategic skills in the audio-visual industries. In the meantime, the Education, Sport and Culture Committee will be examining training in the film and television sectors in autumn 2001.⁵⁰

There are around 290 companies active in the broadcast, film and video sectors, employing over 3500 people;⁵¹ 2750 businesses in Scotland are involved in software consultancy/supplies, employing over 10,000 people, with significant numbers involved in multimedia and games;⁵² 18% of employees in games development in the UK are working in Scotland, the joint highest with London.⁵³ A number of leading television production and interactive media companies have recently set up joint ventures to provide content across several platforms. Gaelic media currently sustain approximately 315 jobs.⁵⁴

Although Scotland has a high concentration of content originators, there are no content distributors or marketing companies based in Scotland.

The audio-visual industries are based chiefly in Glasgow, where BBC Scotland, the Scottish Media Group and Channel 4's Nations and Regions office are based, and where the majority of the broadcast independent production companies are located. PACT, which has a strong track record in Scotland in promoting training to members, is also Glasgow-based, as is Scottish Screen. Edinburgh is particularly strong in ICT companies. The Dundee area has a strong publishing tradition and a developing games cluster. Scotland IS, the representative body for the interactive media, games and software industries, has offices in Glasgow, Livingstone and Aberdeen.

Government Policy

With education a devolved responsibility and with the Scottish Executive's commitment to the skills, enterprise and lifelong learning agendas, the Scottish audio-visual industries will have to determine the degree to which training policies are consistent with those of other nations and regions of the UK.

⁴⁹ Creativity and Enterprise: Exploiting Intellectual Capital in the Knowledge Economy, Scotland's Creative Media Industries report (1999).

⁵⁰ Issues in the Scottish Film Industry: report by Michael Russell, MSP, to the second meeting of the Education, Culture and Sport Committee, (2001).

⁵¹ John Lord Associates, New Media Partners and Parker Associates, Skills for the Creative Industries in Scotland, draft report, (May 2001).

⁵² Gaelic Television: a dedicated channel. Scottish Executive consultation document (2000).

⁵³ The UK Games Industry and Higher Education, Human Capital, (April 2001).

⁵⁴ Gaelic Television: a dedicated channel. Scottish Executive consultation document (2000).

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Skillset has worked closely with the Scottish Qualifications Authority (SQA) to ensure that Scottish Vocational Qualifications (SVQs) and National Vocational Qualifications (NVQs) are based on the same standards and are available to industry on the same basis as elsewhere.

Government in Scotland has thrown its weight behind the creative industries sector, recently identified as a priority cluster, by backing a set of initiatives with £25 million for investment between 2000 and 2003 through Scottish Enterprise. With skills and talent one of the four key areas for investment, and a focus on the development of the digital creative content sector, initiatives include:

- extensive Labour Market Information (LMI) into training and skills in Scotland;
- the development of programmes to help companies improve training and business skills;
- international exchange programmes to help companies enhance skills while building business alliances;
- a digital media centre in Glasgow and a creative media industries campus in Dundee;
- international placement schemes for students.⁵⁵

In 2001/2, £74.6 million was also allocated by Scottish Enterprise and Highlands and Islands Enterprise for training for young people, including Skillseekers and Modern Apprenticeships. Up to now this has not yet been accessed by the broadcast, film, video and interactive media sectors in Scotland. Recent approval of the Modern Apprenticeship framework in Scotland will change this. It highlights the significant opportunity that now exists to develop a more robust approach to tackling skills issues at all levels in Scotland, matched by the deployment of industry and public funding to meet the challenges.

Skillset, as the NTO, can play a key role in bringing the players - including industry and industry agencies, higher and further education, the Scottish Executive, Scottish Enterprise, Highland and Islands Enterprise and the Local Enterprise Council (LEC) network - closer together within an overall policy framework.

Although broadcast policy currently remains the remit of Whitehall, the mooted establishment of a new Gaelic broadcast authority in Scotland by the end of the decade⁵⁶ would certainly create further demand for training. It is estimated that, if the *Milne Report* proposals for a dedicated Gaelic channel were implemented in full, there could be as many as 800 new jobs created across the sector, as well as a framework for the development and maintenance of standards and assessment.

⁵⁵ Scottish Enterprise Press Release (August 2000).

⁵⁶ Gaelic Television: a dedicated channel. Scottish Executive consultation document (2000).

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CPD in Scotland: Short Courses

Specialised short courses for the industry have not always been readily available in Scotland, so Scottish Screen designs and delivers courses to the industry in addition to buying in training solutions across a variety of creative, business and technical areas, providing opportunities for the continuing professional development of industry staff and freelancers. Courses, which may last up to 5 days, include: Basic Budgeting and Scheduling for Drama, Health and Safety, Introduction to Research and Scenic Design Skills for Art Directors. It has specialised in residential writing/producing courses, including *Opening Shot* and *Movie Makers* and runs courses for producers in areas like TV series development, finance, distribution and marketing.

The opening of Channel 4's Nations and Regions office in Glasgow, among other factors, has encouraged a number of London companies to set up bases north of the border. Scottish companies have set up satellite offices in Glasgow, creating further employment opportunities. However, certain skills gaps in the workforce have been identified at this stage, including the shortage of high-level researchers, production assistants and producers.

Training and Education Provision

The following bodies offer formal training for the industry:

Higher and Further Education

There are around 40 media courses offered by 10 Universities and 30 Further Education Colleges,⁵⁷ including Sabhal Mor Ostaig on Skye which offers courses in Gaelic. There is a huge diversity between these courses, which include media management, animation and broadcast at various levels and with varying approaches, from rigorously academic to strongly vocational.

Several courses are leading providers in the UK and are internationally recognised. Many have strong links with industry, often involving industry liaison committees. As elsewhere in the UK, other disciplines, such as ICT and journalism, also deliver students and graduates into the audio-visual industries.

Scottish Screen

Scottish Screen, the strategic agency for the screen industries in Scotland, takes eight new entrants over an 18-month period through a structured course with industry placements,⁵⁸ leading to an SVQ qualification. It runs short courses for industry in partnership with other bodies, notably PACT, in technical, production, screenwriting, health and safety and business topics.

Scottish Screen has also run a fast-track producer development scheme, offering flexible training solutions in response to identified need. It manages a bursary scheme to enable other professionals to attend high-level training courses, such as those run by the MEDIA Programme or the NFTS. It is also an SVQ Assessment Centre for Skillset Professional Qualifications and a partner in **skillsformedia** Scotland. Training is funded through industry and grants.

Research Centre for Television and Interactivity

Based in Glasgow, the Research Centre, which is active across the nations and regions, is closely linked to Channel 4. The Centre runs the Researcher Development Programme for companies from the UK nations and regions and is linked with higher education for the delivery of elements of the programme.

⁵⁷ Media Courses in Further and Higher Education, Scottish Screen (2000).

⁵⁸ The Modern Apprenticeship Framework for Scotland was approved by MAIG in March 2001, so Modern Apprenticeships now offer another route into the industry for new entrants in Scotland without formal qualifications.

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Comataidh Craolaidh Gaidhlig/Gaelic Broadcast Committee

The Gaelic Broadcast Committee (CCG) devotes £225,000 of its £8.5 million to training, mainly through the Gaelic Training Trust (£128,000). The Trust is responsible for the HNC/HND courses at Sabhal Mor Ostaig on Skye, short courses, scholarships, and a number of other smaller initiatives.

BBC Scotland

BBC Scotland offers extensive in-house training for its 1200 employees. Training ranges from production skills, technical and new media, to conventional business skills. Some of these courses are now available in interactive format. BBC Scotland will be spending approximately £1 million on training in the financial year 2001/02.

BBC Scotland also contributes around £100,000 per annum into Gaelic training for 110 staff, and takes student placements from Sabhal Mor Ostaig.

Scottish Media Group

SMG, which owns the franchise for Scottish Television and Grampian Television, offers in-house and external training for its employees. Contract and freelance staff also have access to these training programmes. Scottish and Grampian together fund some £275,000 for the Newfoundland Project, providing opportunities for new talent to develop within the industry. SMG also works closely with Scottish Screen on training initiatives, and takes student placements from Sabhal Mor Ostaig.

Border Television

Border Television offers in-house training for all employees and regular freelancers, the majority of which is conducted by a mix of on and off-the-job training. Border is a vital training ground for many joining the industry, particularly within the newsroom and technical operations.

Media Access Centres

Workshops in Scotland offer courses in various aspects of film and video, with an increasing emphasis being placed on digital and web-based training. Courses tend to be targeted at entry level and, although none is currently linked to formal accreditation units, some workshops are currently considering how to achieve this.

Independent Companies

A number of companies, particularly in the interactive media and games sectors, organise in-house training schemes for employees designed specifically for their needs, particularly in technical areas (see below). Many take advantage of generic courses in management, administration or software.

Skills Issues

Research⁵⁹ shows that Scotland has skills gaps similar to those identified in the

⁵⁹ The analysis in this section is based largely on two pieces of research: Survey of Independent Companies in Scotland 2000, Scottish Screen, January 2001, and Skills for the Creative Industries in Scotland, draft report, John Lord Associates, New Media Partners and Parker Associates, (June 2001).

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rest of the UK, including make-up, design, quality scriptwriting, and business and management skills. A proliferation of small companies and a large freelance workforce often lead to ad hoc and erratic training activity.

Skills issues in Scotland can be summarised as:

- growth and skills needs
- fluctuating demand
- talent and recruitment practice
- staff training and professional development.

Growth and Skills Needs

Micro businesses dominate the Scottish industrial landscape at present. Founders and key players tend to be multi-skilled, driven by either technical or creative skills and personal qualities. This means a high demand for producer/business skills, which in turn has led to a reported shortage of experienced producers, including film producers, series editors, executives, and the kind of talent that secures network commissions and film financing. Without the skills to find the business in the first place, there is little call for other related craft and technical skills.

As businesses grow and mature, more specialised skills are required. Traditional media companies tend to need to acquire technical skills, whereas digital companies are technology led. Recent research⁶⁰ has shown that there is significant failure of demand for training from SMEs in Scotland, where there is an inability to analyse, articulate or address skills needs effectively.

In small companies, individuals are expected to be enterprising and to learn new skills as required. This is often offset by a lack of opportunity for formal training and development. There is a high demand for individuals who combine technical and creative skills. Managerial skills still lag behind.

Fluctuating Demand

Companies coming to Scotland have frequently crewed productions from outside, thereby limiting opportunities for qualified personnel on the basis of perceptions of the talent available, and paying lower rates to Scottish personnel. Several Scottish companies noted that the freelance pool in Scotland was too limited, so they too have been sourcing freelancers from outside. This is one half of a Scottish 'Catch-22'.

Talent and Recruitment Practice

The other half of the 'Catch-22' is the fact that Scotland loses a lot of its best talent to England, being unable to offer potential recruits the same range of career opportunities and choices as London. Most companies in the broadcast and film sectors recruit within the small Scottish creative community, frequently by word of mouth, through poaching or speculative approaches, or by employing returning ex-pats. There is little career progression.

⁶⁰ John Lord Associates, New Media Partners and Parker Associates: Skills for the Creative Industries in Scotland, draft report, (June 2001)

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The Scottish Games Cluster

Dundee is today at the forefront of one of the world's most vibrant new industries: games. At the heart of the city's Creative Industries Campus is the University of Abertay - the first UK University to set up a BSc and Msc in Computer Games Technology and host to the International Centre for Computer Games and Virtual Entertainment. Scotland, alongside London, has the largest number of games development employees in the UK. Scottish companies, universities, further education colleges, enterprise companies and other partners, such as the Scottish Games Alliance, are collaborating to fuel the success of the Scottish games cluster.

The games and software industries and the larger firms tend to be more outward looking, recruiting through more formal channels, with many deliberately recruiting from outside Scotland. Specialist recruitment consultancies report that they frequently need to work with companies not only to ensure that company expectations match the skills available on the job market, but also to train companies in how to recruit, develop and support new recruits.

Thirty-five percent of the industry have qualifications directly related to what they do,⁶¹ and a number of companies have strong links with colleges or universities. Opinions of higher and further education vary. Although a rounded education, combined with industry focus and work experience, is a common ideal, companies stress that the graduate route is not the only one: experience or a good portfolio are seen as just as valid. Colleges and universities could be forgiven for believing they are getting mixed messages from industry.

Staff Training and Professional Development

Larger companies in Scotland have structured training and staff development, though typically these are larger firms with overseas/UK owners. The majority have no formal HR policies, some offering no training at all. Others offer a range of provision, including induction, management training, on-the-job training, shadowing and mentoring, short courses or events.

Difficulties in sourcing appropriate training in Scotland have been identified, as well as difficulties in accessing information on training opportunities. Individuals do not want to take time off or to pay the price for quality training. Many firms' behaviour and attitudes to skills development suggest that they believe the responsibility lies solely with the individual employee or freelancer.

Action on Skills

Growth and Skills Needs

Agencies working with the sector, such as Scottish Enterprise Glasgow or the Glasgow Film Office, have encouraged entrepreneurship and promoted a focus on business development through joint schemes, to support business development, including subsidies for training. Some training in business skills has been provided through courses run by Scottish Screen and PACT, or by European initiatives such as the MEDIA Business School, but these tend to be limited in length and scope. Technical skills in the interactive sector tend to be developed on the job or with training provided by companies in-house.

Fluctuating Demand

The Research Centre's Researcher Development Programme, based in Glasgow, provides sustained support for companies for up to a year, to bring in-house a researcher to develop ideas for network commissions. The aim is to enable companies to retain their research base so that they can develop ideas for

⁶¹ 'Survey of Independent Companies in Scotland 2000, Scottish Screen, (January 2001).

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further commissions. This grows the company and its skills base, taking companies and freelance researchers out of a cycle where they develop in-house expertise and then lose it through lack of opportunity.

As elsewhere in the UK, freelancers gain access to subsidised training on certain courses through the FTF.

Talent and Recruitment Practice

Vis Interactive, a games company, is one of several companies that has close ties to a particular higher education provider, creating a bridge into the industry for graduates. Many companies, particularly in the interactive media sector, recruit worldwide. Digital Animation Group is one such.

Staff Training and Professional Development

A combination of individual or joint initiatives by professional associations, such as PACT, and agencies such as Scottish Screen and the Local Enterprise Companies, have helped to encourage companies to offer staff training and professional development.

Recommendations

These recommendations are in addition to the overall AVITG recommendations.

Pending the outcome of the on-going review of non-departmental public bodies in Scotland, (which includes Scottish Screen) and the NTO Review, roles between these agencies and other bodies will be clarified. The appropriate agencies should work together to ensure the following:

- The establishment, as a priority, of an employer-led panel representing the broadcast, film, video and interactive media sectors, working closely with Skillset and Scottish Screen, to advise and lead on an industry skills strategy for Scotland;
- The development of a broad cross-industry advisory panel that brings FE/HE together with industry to recommend improved mechanisms for linking demand and supply in Scotland, as well as other linked issues;
- A rolling programme of research, mapping industry trends and skills needs should be initiated by Skillset and linked to Future Skills Scotland;
- Better use of existing public frameworks and funding in Scotland to match industry funding for skills development and training;
- Linking **skillsformedia** Scotland to the Scottish University for Industry (Sufi)/Learndirect to provide a Scottish portal for comprehensive careers information for pre-entrants, new entrants, freelancers, staff and companies in Scotland;
- Extension and promotion of management skills for the industry, including sourcing and promotion of generic management skills courses and programmes;

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- Establishment of a rolling programme of training in other key areas where gaps have been identified, including production and writing;
- Promotion of a skills and learning culture in companies and among freelancers;
- Development of a programme to promote professional recruitment practices in the sector.

Skillset should:

- enhance its presence and identity in Scotland in response to the devolution of the UK learning and skills agenda;
- Work closely with the Scottish Parliament's Enterprise and Lifelong Learning Committee throughout its enquiry.

The Scottish Executive should articulate more clearly its recognition of and support for NTOs as employer-led strategic skills bodies for their sectors, to facilitate a better understanding of the roles and relationships between NTOs and government agencies at Scottish and UK levels.

D2 WALES

Background

The sectors in Wales are a hybrid of two technologies and traditions:

- Video and film for broadcast;
- Digital multimedia for all distribution channels, including the Internet.⁶²

The video/film sector has been strong in relation to the size of the Welsh economy, owing to demand from the major broadcasters, S4C, BBC Wales and HTV Wales. But the independent producers have sometimes been limited in their ambitions, reflecting their reliance on relationships with local broadcasters. This faces an uncertain future because of these internal factors and the external pressures of global competition.

New media and multimedia technologies are being adopted by the 'traditional media' companies, but there is a new generation of enterprises that have based their entire strategies around these technologies. Many of the better-known examples are based in Cardiff, with others in the Valleys and distributed throughout Wales. Owing to the expansion of services based on the new technologies, this may have clearer growth potential. Infrastructure developments will offer new opportunities for rurally located businesses.

Current estimates suggest around 600 businesses employ 6000 people in Wales. The main centre of activity is around Cardiff, with a significant cluster of both 'traditional media' and new media business in the north, particularly around Caernarfon and in the west Wales and Llanelli areas.

The occupational profile of the sector is distinctive, with very few operatives, but significant proportions in professional, associate professional, technical, craft and service occupations.

In employment terms the sectors in Wales are small, relative to the rest of the UK. The employment forecast is for growth, which is seen as fairly modest in terms of absolute numbers, but significant in percentage terms - around 28% over 10 years. However, employment in the sectors is not forecast to grow in importance relative to the UK as a whole.

A determining factor will be the extent to which major purchasers in Wales are prepared to establish innovative business strategies using new digital technologies.⁶³

Government Policy

The sectors are important in both economic and cultural terms. The presence of three major broadcasters provides a key means of expressing Welsh identity, both in Wales and potentially across the developing global media markets.

⁶² Much of this analysis is based on the section on media and new media sector skills requirements in Wales in the Future Skills Wales report (York Consulting Ltd, August 2000). Compiled by The Future Skills Wales Research Forum, the report forecasts future generic skills needs across Wales. Steve Martin, Chief Executive of ELWa (Education and Learning Wales) in his introduction to the report, stresses that these sector reports will form the basis of ELWa's plans for addressing sectoral skills needs.

⁶³ Future Skills Wales, York Consulting Ltd, (August 2000).

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Dimension 10

Cyfle, the Welsh Media Industries Training Company, has recently created D IO, an employer-led initiative to "incubate" skills for interactive media productions.

D IO's uniqueness is that it has an open recruitment policy, with the industry teaching skills for jobs in a simulated commercial environment. During the six months, trainees gain a Technical Certificate, and following completion, those who find employment with a company will register as Modern Apprentices, working towards NVQ Level 3. Three intakes of D IO are planned over two years in South and North Wales.

This innovative scheme with full industry involvement has attracted financial backing from the ESF, Welsh Assembly and ELWa.

This has been recognised by the National Assembly for Wales, most recently in its draft economic development strategy. The Welsh Development Agency is also placing a growing emphasis on strengthening indigenous businesses, with a particular focus on sector development and the promotion of clusters in targeted industries, of which media is one. The establishment of Education and Learning Wales (ELWa), the equivalent of the Learning and Skills Council in England, as well as the locally based Community Consortia for Education and Training (CCETs), will play a key role in driving and funding skills development in the sectors throughout Wales.

Training Provision

The following provide training:

Higher Education

Nearly all HE Colleges in Wales now offer media-related courses. Some have established a standard of excellence in particular fields, such as journalism, animation or computer animation. Some have also secured significant funds for establishing hi-tech facilities such as multimedia centres. Some HE Colleges are now introducing a postgraduate degree in production.

Links between HE and industry could be improved significantly,⁶⁴ but some HE courses do attract industry support in the form of student bursaries for areas such as journalism or film studies.

Further Education

Most FE colleges offer media-related courses and some also benefit from the delivery of courses by affiliation to HE colleges. Links with industry could be improved, and the new Knowledge Exploitation Fund has as its main objective the improvement of links with industry and maximising the commercial opportunities within FE and HE establishments.

Cyfle

Cyfle is the main training provider for the freelance and independent production television, film and interactive sectors. It offers a 12-month full-time new entrants' course for 10 new entrants per annum, leading to an NVQ qualification; 93% of previous trainees are working in the industry today.

Cyfle also provides short courses in technical, production, health and safety and business areas. It is an NVQ and Key Skills assessment centre. Cyfle is funded jointly by S4C and by independent companies through a voluntary training levy, with public funds matching this industry investment.

Media Skills Wales

Media Skills Wales is sister company to Cyfle. It researches training needs in the sector and seeks solutions to meet those needs. The Skills Wales Fund, an MSW

⁶⁴ Cyfle/Media Skills Wales Training Needs Analysis (2000).

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Skills Diploma for Wales

In Wales, the Modern Skills Diploma for Adults will provide structured training for the over 25s in employment. A budget of £9.75 million over the next 3 years has been set aside for the scheme. The Diploma will build on the Modern Apprenticeship programme and will integrate practical training in the workforce with off-the-job learning and key skills.

The upper age limit of 25 years has also been removed for the completion of the Modern Apprenticeship. These two initiatives for adults should have a great effect on those mature entrants to our industry and will also help to reach the assembly's target of 14,000 Modern apprentices in training by March 2003. They could also have applicability across the UK.

initiative, enables individuals to follow short courses or take up attachments and secondments in the industries. MSW also runs a new entrants' course with seven places per annum, and supports the development and implementation of standards. It is funded by S4C, BBC Wales and HTV, matched by public and European funds. MSW has secured National Assembly of Wales funding to employ a training officer, one of whose key roles will be the implementation of the AVITG recommendations in Wales.

S4C

In addition to its sponsorship of industry-wide training, S4C supports a number of internal training initiatives, including the training at entry level of video operators. A number of postgraduate students in the expressive arts and journalism are supported at various institutions through scholarships.

HTV

As the ITV contractor in Wales, HTV provides entry-level opportunities and on-going training both in-house and off-the-job. HTV encourages staff from independents or other programme suppliers to undertake training and to share HTV training resources. The housing of independent companies at its Cardiff base facilitates access to high-level interactive training facilities.

BBC Wales

The majority of training activity is in-house and on-the-job, supplemented by formal courses at the BBC's Wood Norton training facility or with courses run directly by manufacturers of technical equipment; 2.5 % of staff costs are budgeted annually for staff training.

As a result of a recent training audit, much of the current focus is on multiskilling. Members of staff have an individual training plan, which is discussed with their line manager at their annual appraisal and reviewed after 6 months.

A recent initiative has seen four broadcast technical operators take up an 18-month training period divided between residential courses and consolidation at base, aiming to reach accredited NVQ standard, at either level 2 or level 3. This training is part of a continuous programme to introduce new skills and talent into the broadcasting industry in Wales. A number of BBC staff have been trained and work as NVQ assessors.

The provision of workstation-based online training through Learning Online is increasing within the BBC.

Sgrin

As the media agency in Wales, Sgrin, which is funded by the Welsh Development Agency, the Arts Council of Wales and a number of broadcasters, has a training and education policy based on working in partnership with recognised training

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Ty Ffilm

Ty Ffilm is a film workshop based in Cardiff, providing subsidised equipment hire and training in film and video production. Workshops of this type can provide a useful bridge between theoretical expertise and practical experience and have traditionally provided a route into the industry for individuals from under-represented groups. Ty Ffilm provides access to subsidised equipment hire and runs short courses on topics including screenwriting, music and animation.

bodies, including Skillset, Cyfle/MSW and HE institutions such as the Welsh International Film School. Through this it facilitates the provision of quality training for the moving image in Wales, with particular reference to film. The MEDIA Antenna Cymru Wales office is based at Sgrin and acts as a conduit between the industries in Wales and the MEDIA Plus programme, which provides opportunities for training at European level.

Skills Issues

The following skills issues have been identified:⁶⁵

- Need to separate business, creative and technical skills so each can be addressed appropriately;
- Skills deficiencies in commercial and marketing areas;
- Interactive and new media technical skills needs;
- Strengthening skills and an entrepreneurial approach to the industry at new entrants' level.

In addition to the above, the difficulties of finding skilled signers in Wales is exacerbated because of, for example, S4C's need for people who are able to translate from Welsh into BSL. The cost of both provision and training, when directed at the needs of a single digital platform, is currently difficult to bear and to implement in practice.

Action on Skills

Some of the ways in which skills needs are currently being tackled in Wales include:

Separation of separate business, creative and technical skills needs

Each year Cyfle prioritises its short course provision based on the findings of the Cyfle/MSW Training Needs Analysis (TNA) into the following categories: technical, creative, business and health and safety. During 2000 a total of twenty-seven courses were offered: ten technical, eight creative, six business and three health and safety.

Skills deficiencies in commercial and marketing areas

Other examples of addressing specific sector skills are the Siôn Prys Fund, which was established in 1999 in order to part-fund business courses for professionals in the industries, and the TAC/Source Wales project for establishing best practice in business.

⁶⁵ Future Skills Wales report, (August 2000).

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Interactive and new media technical skills

Interactive and new media technical skills needs are being addressed by Cyfle/MSW at newcomer level through its full-time courses, the new Dimension 10 Interactive Media project, which offers Modern Apprenticeships in interactive media, and the promotion of the new Interactive Media NVQ.

Interactive media skills courses for existing professionals are not widely available in Wales. Funding support for individuals is available through the Skills Wales Fund, and some HE institutions are offering interactive media training courses.

Strengthening skills and entrepreneurial approach to industry at new entrants level

The new Cyfle/S4C Producer Fast-Track scheme is an example of a scheme that will encourage an entrepreneurial approach at newcomer level, but there are very few such formal schemes.

Recommendations

In addition to the recommendations contained in this report, recommendations specific to Wales are:

In line with the National Economic Development Strategy, the National Assembly for Wales should designate the audio-visual and digital media sectors as priority economic development sectors for Wales.

The National Assembly, ELWa, WDA and the industry should work together to formulate the key elements of a sector development strategy. A task and finish working group featuring representatives of each of these sectors should be established to take this work forward.

Skillset should:

- enhance its presence and identity in Wales in response to the devolution of the UK learning and skills agenda;
- initiate a rolling programme of research, mapping industry trends and skills and needs linked to Future Skills Wales;
- work with ELWa/Media Skills Wales/Cyfle/Sgrin and other providers to devise a comprehensive training strategy aimed at addressing both skills shortages and business development needs;
- work closely with Media Skills Wales/Cyfle to develop the necessary structures to enable full and appropriate implementation of relevant UK initiatives and accreditation of vocational courses within HE/FE.

Media Skills Wales/Cyfle should ensure that the sector is aware of the industry qualifications available, of the key issues in the industry identified by the AVITG, and that it is familiar with any proposals for change.

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Companies operating in traditional and new media should be encouraged, building on the New Media Group at Sgrin and Media Skills Wales/Cyfle's work with this sector, to develop their commitment to training and development;

The existing north Wales cluster development proposals⁶⁶ should be adapted and adopted for the whole of Wales;

The Wales Digital College⁶⁷ should be used as a platform for supply chain development courses for the sector;

The Welsh Development Agency should establish priority funding lines to maximise the ability of Welsh audio-visual companies to globally market and exploit their products;

All organisations providing careers advice in Wales should ensure a clearer distinction is made between general academic media studies provision and vocational provision, and, as a priority, target young people, especially women and those from ethnic minorities, to consider vocational routes;

Particular attention should be accorded to the development of interactive media in rural and European Union Objective 1 areas.

⁶⁶ See Future Skills Wales report York Consulting Ltd, (August 2000), p 27

⁶⁷ The Wales Digital College is a partnership between S4C, Acen (a trust dedicated to promoting the teaching of Welsh) and FE colleges in Wales. It uses a combination of digital TV, the internet and traditional teaching methods to support lifelong learning in Wales.

D3 NORTHERN IRELAND

Background

The audio-visual industries in Northern Ireland have expanded significantly in the last four years, aided substantially by the peace process. Northern Ireland is affected both by its geographical distance from the rest of the UK and by the comparative economic success story in the 1990s of its neighbour, the Republic of Ireland.

The overall industry is mainly based on television, with an expanding interactive media sector; in addition, some companies have secured development funding for feature films, with 16 having been made in Northern Ireland since 1997. The industry is based largely in Belfast, with a number of companies clustered in and around the city of Derry.

The current size of the sectors is estimated at:

- Broadcasters - 2
- Television, film and video production companies - 74
- Freelance crew - 210
- Digital media production companies - 120 (these have been shown to have increased in the last 4 years by over 10% per annum).⁶⁸

Twelve of the independent production companies (most of which are small and less than 10 years old) are significant players in the region. The major employers of a continuing skilled workforce are the two broadcasters, UTV and BBC Northern Ireland.⁶⁹ Digital media companies employ approximately 1000 staff. All companies in the sectors rely to a considerable extent on the availability of a skilled freelance workforce.

Government Policy

In December 1999 power was devolved to the Northern Ireland Assembly and its Executive Committee of Ministers as a direct result of the Belfast (Good Friday) Agreement.

New government structures in Northern Ireland provide an opportunity to rationalise liaison between the four government departments' key sectoral development and skills training agendas: the Department of Culture, Arts and Leisure (DCAL); the Department of Education (DE); the Department for Employment and Learning (DEL); and the Department of Enterprise, Trade and Investment (DETI). The establishment last year of a Creativity Action Group to coordinate operational priorities and research in the creative industries and oversee the implementation of the *Unlocking Creativity* strategy published in June 2001⁷⁰ is an important step towards achieving this. On a national level, the industries receives support from the Film Council, Skillset and the Research Centre for Television and Interactivity.

⁶⁸ Multimedia Ireland: Realising the Potential, Northern Ireland Interactive Multimedia Association and DREAM (Digital Regeneration of Enterprises in Animation and Multimedia)

⁶⁹ Northern Ireland Film Commission (2000); and A Development Strategy for the Northern Ireland Film and Broadcast Sector, Oisberg/SPI on behalf of LEDU and the Training and Employment Agency (Consultative draft)

⁷⁰ 'Unlocking Creativity', Department of Culture, Arts and Leisure (November 2000)

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Easter Film School: N. Ireland

The Easter Film School is an annual one week foundation course, run by the Northern Ireland Film Commission, for 15 young people with some industry experience. It explores the production process from initial script idea through to distribution and includes sessions on location, a careers workshop, one to one careers guidance, preparation of a personal development plan and support for up to a year after the course. Placements, through the FOCUS scheme, are offered on a competitive basis. Tracking shows that 10 out of 11 EFS "graduates" each year find employment within the industry and 90% are currently working in the broadcast, film or video industry.

Northern Ireland has also been able to access region-specific funds, such as the EU's Special Support Programme for Peace and Reconciliation and the International Fund for Ireland. Devolved government brings with it many opportunities, aligned with the challenge to rationalise these funding sources for training and development in the industry.

In March 1999, the Northern Ireland government produced *Strategy 2010*⁷¹ which sets the agenda for economic development in Northern Ireland. The vision for the Northern Ireland economy was set out as 'a fast-growing, competitive, innovative, knowledge-based economy where there are plentiful opportunities and a population equipped to grasp them'.

A number of key strengths are identified, including:

- A youthful population, which will remain younger than that of the EU as a whole;
- A strong record of educational attainment, especially at the higher ability levels, which will be a critical advantage in the knowledge-based economy of the future;
- A telecommunications infrastructure which is among the best in Europe;
- Northern Ireland's small size, which can help in networking, information exchange and effective partnerships between business and government.

The Government's economic strategy and the shift in emphasis away from politics/factual programming and news arising from the peace process/political stability provides the context for all development needs within the audio-visual industries.

The Northern Ireland Film Commission

The Northern Ireland Film Commission (NIFC) was established in 1997 and is now funded primarily by DCAL and DETI (via LEDU, the Northern Ireland small business agency). In 1995 the NIFC was recognised by the Training and Employment Agency (T&EA) as the Sector Training Council (STC) for broadcast, film, video and interactive media training, responsible for monitoring, developing and coordinating all industry training delivered in the region.

The NIFC is the Regional Consortium for Skillset in Northern Ireland. The NIFC and Skillset work in partnership to develop and maintain a skilled workforce to meet the needs of a growing industry in Northern Ireland.

The NIFC has also established an Education Policy Working Group, endorsed by the Minister for Education, to develop a moving image education policy for the curriculum in Northern Ireland, with particular emphasis on the creative use of new technology.

⁷¹ Economic Development Strategy Review Steering Group report

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The Northern Ireland Interactive Multimedia Association

The Northern Ireland Interactive Multimedia Association (NIIMA) is the coordinating body for new media, aimed at promoting and supporting new media companies in Northern Ireland. In 1998 the Nerve Centre (multimedia training and production) established DREAM (Digital Regeneration of Enterprises in Animation and Multimedia) to stimulate growth in Northern Ireland's multimedia sector and to help bridge the gap between government policy, education providers, network providers, content providers and commercial enterprises.

Training Provision

The following bodies offer formal training for the industry:

- Two third-level institutions in Northern Ireland offer media-related courses;
- Eight FE/HE colleges offer traditional media courses;
- The two regional broadcasters (UTV and BBC NI) both offer in-house training programmes;
- There are eight other training providers, some of which offer community-based media courses;
- The NIFC delivers a comprehensive training programme for both new entrants and experienced industry practitioners;
- Two third-level institutions in Northern Ireland offer interactive media courses;
- Two FE colleges offer interactive media courses;
- There are eight other interactive media training providers.

Skills Issues

One of the key challenges for Northern Ireland is 'how an industry based on a structure of small companies reliant on freelancers can be enabled to recruit a workforce that has a sufficient range of skills to operate in today's industry and to reskill the existing workforce to deal with the rapidly changing technology.'⁷²

Key issues can be summarised as:

- Access to core/repeat funding for training/development within the context of a devolved government
- New entrant training
- Careers guidance
- Accreditation
- Irish language training
- Equality of opportunity
- Company development
- New media training.

⁷² Screenskills NI, Northern Ireland Film Commission, (1999).

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Action on Skills

Access to Core/Repeat Funding for Training/Development within the Context of a Devolved Government

Current funding arrangements are on a project-by-project basis. This does not allow for continuity of projects/staff, or for long-term strategic planning. Of particular concern is the continuing development of the freelance market. A detailed review of the sector's development needs, including funding issues, has been commissioned by LEDU and the T&EA.⁷³ Currently in its consultative stage, AVITG is grateful for the access and permission granted to draw on its draft conclusions. This concludes that a business development strategy for the Northern Ireland film and broadcast sector, which encompasses both company and skills development, must involve four overarching themes articulated in a 'common vision' for the sector in order to build the critical mass required for sustainable activity, i.e:

- Business planning - with due regard to the realities of international markets;
- New media - a strategy fully engaging with new digital media opportunities;
- Collaborative experimentation and cross-fertilisation across subsectors;
- Agency coordination.

New Entrant Training

Although the NIFC provides short training courses for new entrants, Northern Ireland currently does not have a structured new entrants' scheme for either the traditional or the new media sectors. The growth of the industry, coupled with an ageing workforce, continues to highlight the need for such schemes, to be built on current best practice.

Careers Guidance

The NIFC provides expert careers advice/training needs analysis for both new entrants and established practitioners. This service should be linked to the **skillsformedia** careers service proposed in **Section C6**.

Accreditation

The NIFC was approved as the Regional Skillset Assessment Centre for Northern Ireland for the delivery and assessment of Skillset NVQs in 1999, and operated the centre for a year before ceasing operation owing to lack of financial viability. The NIFC is currently reviewing its arrangements for NVQ delivery and assessment in Northern Ireland. Informal discussions have taken place to explore the possibility of BBC Northern Ireland acting as the assessment centre for these professional qualifications.

It is critical that a cost-effective and practical way is found to deliver and assess appropriate and relevant professional qualifications in the future in Northern

⁷³ Draft report presently at consultative stage - A Development Strategy for the Northern Ireland Film and Broadcast Sector, Olsberg/SPI on behalf of LEDU and the Training and Employment Agency (Consultative draft)

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Ireland, both for those already in the process of undertaking these qualifications and for those interested in starting the process.

Irish Language Training

In a letter to the Northern Ireland parties on 6 May 2000, setting out the Government's proposals to secure full implementation of the Belfast Agreement, the Irish and British Governments stated: 'The British government will ratify the Council of Europe Charter on regional or minority languages by September 2000 and publish within 6 months an action plan for implementing the charter. Technical discussions on the steps required further to extend TG4 reception in Northern Ireland will continue. Other measures will also be taken, including a 2-year Irish language TV and film production pilot scheme.'

In compliance with the Agreement, DCAL has produced an action plan to set up a 2-year pilot scheme of training for television in the medium of the Irish language. It is estimated that approximately 30 people will be trained in the multiskill requirements of the industry.

Equality of Opportunity

In addition to the diversity issues raised in **Section C5** of this report, community background remains a core consideration within the Northern Ireland workforce, in terms of both recruitment and development.

Company and Freelance Development

The industry in Northern Ireland is characterised by small and medium-sized enterprises and is heavily reliant on the freelance market, where the onus is on the individual to maintain and upgrade skills. The lack of consistent production activity leads to inconsistent skills maintenance and development. The Olsberg/SPI review also identified as critical areas of need, producer development in business planning, understanding of international markets, and creative and script development skills. Practical and financial assistance is required to assist companies to improve their business performance through the development of key members of staff and to facilitate the on-going development of the freelance market.

New Media Training

The new media sector is still relatively new in Northern Ireland, and this is reflected by the large number of small companies (with 81% of companies employing fewer than 10 people). A recent report⁷⁴ proposes 10 recommendations to address the skills gaps within this sector.

Recommendations

In addition to the recommendations contained in this report, recommendations specific to Northern Ireland are:

Skillset should enhance its presence and identity in Northern Ireland in

⁷⁴ New Media Skills In Northern Ireland, Dream Ireland Ltd (April 2001)

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response to the devolution of the UK learning and skills agenda.

Skillset, in partnership with the Sector Training Council (STC) - in practice both the NIFC and its Training Committee - should:

- carry out regular audits of the industry's development needs, ideally on an annual basis;
- ensure that the recommendations of the current sector reviews outlined above (traditional and new media) should be addressed by the industry and relevant bodies on an interdepartmental basis;
- secure training/development funding for the industry in Northern Ireland, at a financial level consistent with the rest of the UK;
- develop further an industry-specific careers advisory service for those entering and already in the industry, in line with **skillsformedia**;
- develop, with NIIMA and local industry partners, a training infrastructure for interactive media which is responsive to the industry's changing needs.

The STC should:

- work together with industry partners, to continue to promote professional qualifications and to secure access to assessment opportunities by 2002, resources permitting;
- review and develop its new entrants' training scheme, building on current good practice, by 2003;
- work with NIIMA to develop a 'Training for Trainers' programme to maximise the potential of skills present in Northern Ireland;
- continue to provide and further develop structured programmes addressing equal opportunity issues;
- continue to make contact with expatriate Northern Irish professionals working outside Northern Ireland to take advantage of their knowledge and contacts and to transfer knowledge and skills to the sector;
- continue to develop cross-border partnership opportunities with the Republic of Ireland.

DCAL should implement the pilot project for training in the Irish language as soon as is practicable.

D4 THE ENGLISH REGIONS

Background

A third of the workforce in the audio-visual industries is based outside London and the nations.⁷⁵ Each English region, with its unique industry structure, has a different set of skills and development needs.

Some regions are strong in particular fields, for example the south-east in interactive media; the south-west, notably Bristol, in animation; the north-west in broadcast and games. The proximity of certain centres, such as Bristol or Birmingham, to London has the dual effect of enabling companies to flourish within a regional cluster by attracting business, but also of drawing talent from the region.

In other regions, low demand is a serious challenge to the growth of the independent sector and, in turn, to the development of a pool of highly skilled freelancers to work on local and incoming contracts.

This impacts on opportunities to enter the industry or to develop skills within it. In some cases, neighbouring regions are jointly exploring the potential to develop cross-regional industry strategies to maximise opportunities. The development of a Northern Assessment Centre, Screentest, for the North of England (encompassing the north-west, north-east and Yorkshire) was begun in 2000 - an economically viable option to provide comprehensive assessment across all three regions.

This impacts on opportunities to enter the industry or to develop skills within it.

Government Policy

The creation of Regional Development Agencies (RDAs), the Learning and Skills Council (LSC), the 47 regional Local Learning and Skills Councils (LLSCs) and the Small Business Service (SBS) in the English regions means that for the first time there is comprehensive investment by Government in the regions to develop a range of skills and learning initiatives, guided by regionally driven priorities. The LSC alone handles an annual budget of £6 billion.

Most RDAs, including the South West Regional Development Agency and South East Economic Development Agency, have already identified ICT as an investment priority, with digital creative content at its heart. Others, including the North West Development Agency, have identified the creative industries. By mid-2001 the North West Development Agency and the South West Regional Development Agency had invested over £400,000 in the industry for two 2-year programmes in ICT and the creative industries, respectively. In general, devolved regional government has already resulted in significant new investment in training for a range of innovative schemes, such as the Media and Multimedia Managers Programme, run by YMTC, and the Training for Convergence programme in the south-west.

⁷⁵ A Snapshot in Time, Skillset Census (2000)

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RDAs and Regional Approach to Skills needs: the North West

North West Development Agency has identified the Creative Industries as an economic development priority. Skillset was supported to research the skills needs of companies and freelancers in the region and to explore the best model for delivering a skills strategy to industry through the Skills Development Fund. A formal employer-led partnership, Media Training North West, was established as a result, that has since become a key player in North West Vision, the region's new strategic media partnership. The RDA has committed further resources to Skillset to help the partnership respond to identified skills development priorities: media managers; freelancers; and ethnic minorities.

However, the interpretation of 'Creative Industries' can vary from region to region, with an emphasis on economic issues in some regions and as on community, access and cultural issues in others. Regional bodies need to be clear that high-level technical, programming and engineering skills underpin the economic success of audio-visual industry sectors.

In the north-east a study has recently been commissioned by the Media Convergence Research Group, with representatives from the media sector, RDA and local authorities, to demonstrate the growing relationship between ICT and the audio-visual industries. Skillset, representing the UK industry as a whole, will need to monitor regional policy developments closely to ensure that different interpretations of industry and different emphases influencing public investment do not undermine the strategic development of the audio-visual industries nationwide.

With many RDAs establishing regional skills units, it will be essential for them to work closely with NTOs, as the bodies responsible for producing quality Labour Market Information (LMI) for their sectors and the annual Sector Workforce Development Plan. Current LMI structures are still bedding down across the regions. Skillset needs to focus on these developments to ensure that, working closely with its partners, it can both feed in and draw down relevant data in a coherent and coordinated fashion across the UK.

Funds invested annually in training in the English regions by major regional employer stakeholders, such as the broadcasters, are matched by regional public funds, and sometimes by European funds, notably the European Social Fund (ESF). Grants from public funds to the national and regional training consortia for regional training initiatives totalled over £650,000 in both 1999 and 2000. The creation of the LLSCs will offer further opportunities for financing skills development in the industry.

The establishment of the Regional Investment Fund for England (RIFE) by the Film Council in 2000 has recently brought together the key media agencies, including the Skillset Training Consortia, to formulate strategic plans to benefit from additional investment in film and moving image activities, including training, in each of the English regions. In some cases, this process of collaboration has been supported by the RDAs. In the south-west of England the audio-visual industries have called for a single strategic agency to replace individual specialist organisations, and the RDAs will be supporting this. While additional investment into training is welcomed, the impact of a training function being absorbed, in some cases, into larger organisations with a broader focus will need to be reviewed in the light of experience.

5 London Production Manager Training Scheme (LPMTS)

The LPMTS was a pilot scheme developed and delivered by FT2 during 2000 with funding from Skillset's Sector Challenge, the European Social Fund and participating companies. Following initial research commissioned by Skillset's London Forum, FT2 developed a training model which consisted of blocks of specially designed short courses at the NSCTP, production attachments and assessment for their NVQ in Production at Level 4. The whole programme lasted approximately 6 months.

Six freelancers were recruited onto the pilot scheme - their backgrounds ranged from 1st AD and Production Co-ordinator on TV dramas to a Production Manager with factual experience. On completion of the scheme each trainee secured their first professional engagement either as a Production Manager on production or working in development on feature films.

Training Provision

Training Consortia

Regional employer-led training consortia are key agencies that support the needs of the broadcast, film, video and interactive media industries in each of the English regions and in Wales.⁷⁶ Regional partners in the training consortia typically include the BBC, ITV companies, other regional broadcasters (e.g. GWR or Mersey TV), IVCA, PACT, BECTU, an interactive media association/network representative and a representative from FE/HE. Skillset has observer status on all training consortia boards.

The training consortia work proactively with other regional partnerships to achieve their aims. At present, these cover both a strategic and a delivery role. They include identifying skills development and training issues in the sectors in the region; developing a strategy to meet the needs specific to the region; sourcing training to meet identified needs; raising industry and public finance for training; developing links between industry and FE/HE; representing and promoting industry skills issues to regional government and key agencies; and promoting the uptake of Skillset standards and qualifications.

Skillset recognises its partnership with the training consortia in a formal way through the Skillset kitemark, for which consortia have to apply. Once kitemarked, consortia can apply for flexible funding arrangements from Skillset; and Consortia have found the kitemark useful as a guarantee of quality when dealing with regional government and other bodies.

In London, a Forum, operating under the umbrella of Skillset, represents the training interests of London's broadcast, film and video industry and is developing its role in relation to the interactive media sector. Skillset represents the industry's interests to the LLSCs, GLA and Government Office for London and to local authorities, and works closely with other industry partners at a strategic level.

In 2000, the English regional training consortia were between them managing a budget of just under £1.5 million of industry and public funds, enabling them to finance a broad range of initiatives. These include new entrants' attachment schemes linked to NVQs, training needs analyses, company development needs analyses, mentoring schemes and flexible bespoke schemes. Skillsbase, the BECTU/Skillset careers initiative, has worked successfully in a number of regions, and is currently being rolled out UK-wide as a central plank of **skillsformedia**.

AVITG believes the consortia should examine how, in practice, the balance between strategic leadership and operational responsibilities for training can be managed. It is recognised that, sometimes, the scale of activities cannot

⁷⁶ English regional Training Consortia catchment areas are commensurate with the Regional Development Agency boundaries.

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Economic Development Partnerships and Skills Development: the South West

In 2001, South West Regional Development Agency, invited regional partners in an open process to come together to design and deliver a targeted skills strategy for the ICT sector rather than bidding competitively. Skillnet SW - Skillset's employer-led training consortium in the region - is now leading a broad based alliance of industry and public partners, including companies, networks, public agencies and HE and FE colleges on a 2 year skills development programme. This scheme targets the animation and digital media sectors, and is backed by Skillset and e-skills NTO. "Training for Convergence" addresses graduate retention, skills needs across creative and technical areas and management skills for converging media.

justify the administrative structures needed to support both functions. But taking responsibility for ensuring that the training provided is of high quality is easier if the evaluator is not also the trainer.

Skills Issues and Action on Skills

Many of the skills issues in the regions are common to the UK as a whole, but those of particular concern to the training consortia are:

- management skills, particularly those relating to growing small businesses into larger operations;
- graduate and talent retention;
- improving links between FE/HE and industry at local level;
- sourcing high-quality trainers and training in the regions;
- developing the freelance pool in regions where production may be low or fluctuating;
- the capacity of the training consortia to carry out a broad remit on limited resources.

Training consortia are addressing these in a variety of innovative ways, with Skillset supporting models of good practice being rolled out across England.

Recommendations

The recommendations below aim to underpin a more robust regional strategy for industry development, with responsibility for strategy and provision clearly identified and separated. Recommendations applicable to the English Regions are:

In the light of the NTO Review, industries should:

- consider the role they wish the training consortia to play, and how they will fund their core activities in the regions;
- consider how best to separate each individual training consortium's strategic role from its operational training provision role;
- continue to develop a more strategic and consistent approach to representation on training consortia boards across the English regions, ensuring that new representatives are inducted and familiarised with corporate policy in relation to Skillset and the training consortia, and are aware of pan-regional as well as local issues.

Training consortia should ensure that they have adequate representation on their Boards from all the audio-visual sectors active in their regions, with particular reference to the radio, interactive media and computers games sectors;

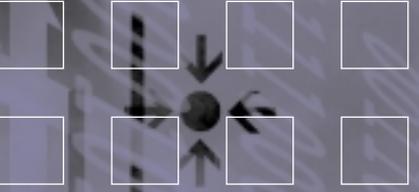
SECTION D - REFLECTING NATIONAL AND REGIONAL IDENTITIES

Skillset and the training consortia should promote more vigorously to the Regional Development Agencies and the Local Learning and Skills Councils the economic importance, profile and needs of the sector.

RDAs should provide core funding as a match for industry investment to enable Skillset and the training consortia to work effectively in the regions, with the LLSCs supporting the delivery of Workforce Development Plans.

Skillset should:

- revise the kitemarking system in a way that recognises the separate functions of strategy and delivery;
- work more closely with the consortia and regional bodies, in particular the RDAs, LLSCs and SBS, to provide better and more consistent information to local industry on sources of training, trainers and courses available across the English regions;
- continue to support and disseminate models of good practice throughout training consortia across the regions;
- develop a strategic approach to working with the regional and national LMI units and skills observatories.



APPENDIX A - THE RESEARCH BASE



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THE DIGEST OF PAST RESEARCH

Introduction

This section summarises the main sources of labour market information on the audio-visual industries, available up to the establishment of the Audio-Visual Industries Training Group in autumn 1999. This sets the background to the development of the programme of research initiated under the direction of the Group.

Primary sources of information have generally fallen within the following categories:

- Official national sources of employment data (the Labour Force Survey)
- Skillset and National/Regional Consortia Labour Market Research
- Sector Trends and People's Skills Scoreboard
- British Film Institute Tracking Study
- Employer workforce monitoring - BBC, ITC and other available company information.

Official National Sources of Data (The Labour Force Survey)

The Labour Force Survey (LFS) is a quarterly employee sample survey conducted by the Office for National Statistics (ONS) which gathers information from individuals on a wide range of employee characteristics, and on skills and training. Freelancers are included within the survey and are categorised as 'self-employed'. The LFS breaks down the entire UK workforce using systems called the 'Standard Industry Classification' (SIC) and 'Standard Occupational Classification' (SOC). In theory, these allow for data from the LFS to be used to show the employee characteristics of every occupation within every industry.

Unfortunately, there are two issues that restrict the value of LFS data to the audio-visual industries. The first is that the relevant SIC codes do not recognise the industry as a single entity. Workers in the television and radio industries are included in the same grouping as those in the theatre, whereas those working in film production are grouped with those in film distribution and exhibition. Thus it is not possible to disaggregate data on those employed specifically in the audio-visual industries. The second difficulty is that the relatively small numbers employed in certain occupations within the audio-visual industries yield sample numbers used in the LFS that are too low to produce reliable estimates.

Nonetheless, the LFS has some value as validation check for workforce data obtained from other means - although as a qualified proxy rather than as a direct comparison.

APPENDIX A - THE RESEARCH BASE

Skillset Employment Patterns and Training Needs Series of Research

In January 1990, the Institute of Manpower Studies conducted a groundbreaking and widely acclaimed survey of the television, video and film industries which for the first time produced information on the size and composition of the workforce, current and future skills shortages and training needs within the industries. *Skillsearch: Television, Film and Video Industry Employment Patterns and Training Needs* (IMS, 1989) included separate surveys of broadcast companies, independent production companies, employees and freelancers.

This research was of crucial importance in unearthing the extent of the industries' dependence on an increasing pool of freelancers, and in identifying an increasing gap in skills between employees and freelancers. The reporting of an urgent need for recognised standards of competence and industry-wide coordination and cooperation over training was a key factor in the formation of Skillset.

The programme of research undertaken by Skillset since its establishment has built on this work, focusing on a range of particular occupational groups or sub-sectors that have commanded attention.

In broad terms, the objectives of this series of surveys have been to develop a picture of:

- the size and structure of the workforce;
- working patterns and conditions of employment;
- current skills base and levels of training;
- training needs and skills deficiencies.

The main projects undertaken up to 1999 included:

Freelance Survey (1994) The survey of freelancers was conducted because:

- they were the group about which least was known;
- their representation within the workforce was considered to have increased;
- their mode of operation was expected to have changed.

The scope of the research was the economically active freelance workforce in the broadcasting, film and video industries. This survey attracted returns from 2852 out of 6242, a response rate of 46%.

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A number of smaller reports presenting detailed data on specific areas within this survey were also produced, including:

- Freelancers in Features (1994)
- Midlands Freelance Survey (1994)
- Welsh Media Survey (1994)
- Scottish Freelance Survey (1995)
- Women Freelancers (1995)

- **Set Crafts Survey (1994)** This survey was conducted because this group was excluded from the 1989 survey, and had been subject to considerable organisational change during the early 1990s. The scope of the survey included both employees and freelancers, and achieved responses from 482 out of 1027, or 47% of those targeted.
- **Radio Survey (1994)** The fragmentation of the workforce within radio resulted in the lack of a single body responsible for collating workforce or training information, and created the demand for this survey of employees and freelancers. A total of 765 out of 1519 individuals returned the survey, a response rate of 50%.
- **Broadcast Journalists Survey (1996)** Perceived changes in employment, due largely to the impact of technology and changing regulation, invoked the need for this survey, whose scope included all broadcast journalists working in the broadcast, video and film industries in the UK. Broadcast journalists working in terrestrial television had been included in the IMS Skillsearch study (1989) but not in the 1994 Freelance Survey. This survey covered both employees and freelancers and was completed by 2950 out of 6921, a response rate of 43%.
- **Broadcast Engineers Survey (1996)** Broadcast engineers were also omitted from the 1994 Freelance Survey, as they are largely an employee group. The combination of changes in broadcast technology and a restructuring of the industry created the demand for this survey of all freelance and employed broadcast engineers working in broadcasting, film and video in the UK. In total, 1587 out of a sample of 2926 completed the survey, a response rate of 54%.
- **Animation Survey (1997)** This survey was conducted to obtain information to provide the basis for the development of a training strategy for the animation industry, to meet the increasing demand for output in this industry and the impact of new technology. The research methodology included surveys of both employers and workers (employees and freelancers). The survey of employers achieved a response of 77 out of 156 (49%), and the survey of freelancers 115 out of 204 (56%).

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- **PACT/Skillset Production Training Survey (1997)** In 1997, Skillset and PACT commissioned a study of training among independent production companies using a combination of in-depth interviews, a short new survey and utilisation of training data from the 1997 PACT Membership Survey. The new survey achieved a response from 143 out of 627 companies (23%) and the PACT Membership Survey was returned by 163 out of 985 (17%).

The quantitative information collated included: recruitment difficulties (freelancers only), amount of training undertaken, types of training, training expenditure and training needs.

- **Freelance Recall Survey (1998)** This survey followed up a number of freelancers surveyed in 1994 who were still economically active in the industry. It covered specific areas, including changes in type and conditions of employment; training needs and recent training; patterns and reasons for retirement, redundancy and change of occupation; retirement rates, redundancy rates and rates of occupational change. A total of 480 out of a sample of 1256 completed this survey, a response rate of 38%.

A number of Skillset-recognised national/regional consortia have also conducted their own research on employment trends and training needs to complement Skillset's national programme.

Sector Trends

This project was initiated by Skillset in October 1997 as part of a national programme, with the objectives of identifying employment trends in the broadcast, film and corporate video industries and recommending sector training targets. Information was collected through desk research, interview programmes and, significantly, a survey of independent production companies, which gathered information on business specialisation; media profile; number of employees and freelancers used; current and future skill needs; and pay. This work served a useful purpose as a broad scoping exercise and as the basis for discussion on further work.

People's Skills Scoreboard

In 1998, Skillset took part in a pilot of a scheme developed by the DTI/DfEE to test a method for creating industry-wide training indicators. The project consisted of a survey combining questions common to all industries devised by DfEE and questions designed by Skillset specific to this sector. The survey included questions on lIP, total employment (including use of freelancers), payroll costs, staff turnover and training expenditure. The response was not sufficiently high for the information obtained to be put to use, but the framework and design of the project are worth taking into consideration in the current context. It is possible that completion of the People's Skills Scoreboard will become a future requirement of all NTOs.

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British Film Institute Television Industry Tracking Study

This longitudinal study of TV production personnel spanned 4 years from 1994 to 1998, using a combination of questionnaire and diary completion methods. It included issues such as programming and environment, as well as employment and training, and has culminated in a series of reports, the last of which was published in May 1999. The objectives were:

- to analyse the impact on individual television careers of the structural, organisational and technological changes of recent years, with increasing competition and downward pressure on costs;
- to collect and analyse data about production personnel, their working conditions and their creative environment; and to make observations about the creative consequences.

In total, 36% of the initial sample completed the first questionnaire and all eight of the subsequent diary questionnaires.

Employer Workforce Monitoring - BBC and ITC Workforce Records

BBC

The BBC maintains a substantial quantity of information on its employees and on freelancers on contracts of less than 1 year, but has historically held less information data on freelancers of 'Schedule D' status.

The information recorded within BBC workforce monitoring systems includes all data on employment and most data on employment characteristics, with potential constraints on the public availability of pay data. There has been no information held on qualifications, but most information on training has been recorded, including means of estimating overall expenditure on training. Some information on recruitment and retention has also been available.

ITC

Workforce information is gathered by the ITC from the ITV franchise holders, Channel 4 and Channel 5. There were (and still are) two routes through which data were collected: yearly recording of basic training information for the purposes of annual performance reviews, and income and expenditure returns completed twice a year, which include information on numbers of staff employed, salary costs and expenditure on training. Information from the latter source is only available publicly in very brief summary form. The ITC does not record information on recruitment and retention issues.

Clearly there are potentially major implications in the DTI/DCMS Communications White Paper: *A New Future for Communications* for the future collection of data from employers by the proposed new regulatory body OFCOM. The system for a continuous cycle of research proposed in **Section C1** will be

APPENDIX A - THE RESEARCH BASE

consistent with the outcomes of the White Paper, which presents an opportunity to review the processes by which information is collected and presented.

Conclusions

- There has effectively been no data available from official national sources (e.g. the Labour Force Survey) to address the labour market information needs of the industry sectors prior to establishment of the Audio-Visual Industries Training Group.
- There has been a substantial amount of research conducted by Skillset on a national level (including surveys of employers, employees and freelancers), and on a regional level by the training consortia. However, this has generally been conducted ad hoc, rather than forming part of a strategic plan for continuous recording of data within an agreed cycle. There is much to be learned in terms of research design from this work, but the actual information generated is largely of historical value rather than providing a reliable current picture of employment and training needs.
- The BFI tracking study did develop a methodology for regular recording of information on workers and training, but the scope of the project was limited to a number of key items and the study has run its course.
- Some larger employers (i.e. broadcasters) have pulled together workforce information on a regular basis, some of which has been directly available (through the BBC, the ITC, and the companies themselves to varying degrees). There has, however, been no common methodology for collating these data (and no universal definition of freelance), which has posed obstacles to benchmarking and analysing information at a cross-industry level.
- The conclusion reached by the AVITG Research Working Group on assessment of the previous stock of labour market information was that an approach designed to fill the gaps identified would need to embrace separate lines of enquiry within a comprehensive regular cycle of data collection, as follows:
 - A system for collation of information from employers on their employee workforce and freelance usage to build up a global picture of use of labour across the industry;
 - Gathering of information from employers representing all industry sectors on specific skills, recruitment and training issues;
 - A survey of freelancers across the industries based on the design and methodology developed in earlier Skillset work.

The development of this system, and its proposal as a formally recognised cycle for future collection of labour market information, is covered in **Section C1**.

OUTCOME OF THE CENSUS

Introduction

To address the shortage of basic, reliable information on employment in the audio-visual industries identified in **Section B**, Skillset conducted the first ever employment census of these sectors on 19 May 2000. All companies in the UK industry for whom records existed were targeted, and asked how many people they employed and how many freelancers they used in particular occupational groups and job roles on that day. They were also asked to indicate how many of them were women, ethnic minorities and disabled. Following the success of the endeavour, it is now proposed that the Census be conducted every year to identify areas of growth and decline, and to monitor and anticipate employment trends in the industries (**see Section C1**).

The Census results have informed the debate presented in several other chapters of this report, and considerable reference is made to the results elsewhere: this chapter sets out a brief summary of the key findings. A full report is available under separate cover from Skillset, which contains full details of the methodology and response.⁷⁷ This is also available on Skillset's website at www.skillset.org. Companion volumes have also been produced setting out detailed figures for each nation/region⁷⁸ and sector.⁷⁹

Key Findings

- The industry's first ever employment census, conducted on 19 May 2000, received a response from 644 companies, covering an estimated 50% of the workforce.
- An estimated total of 115,769 people were working in the UK industries on 19 May 2000, of whom 40,981 (35%) were freelance. Based on previous Skillset research, it is estimated that there may be up to 20,000 more freelancers who were economically inactive on Census day. In other words, freelancers represent around half the pool of labour available to employers.
- Broadcast television is the largest sector, comprising a workforce of 24,102. Broadcast radio is nearly as large, with 22,899 people working on Census day.
- The proportion of freelancers in the workforce varies greatly between sectors, from less than one-fifth in radio to over four-fifths in commercials.
- Over half the workforce is in London and over one-tenth work elsewhere in the south-east.
- Women make up just over one-third of the workforce - 36%, compared with 45% of the whole UK working population.

⁷⁷ A Snapshot in Time: Employment Census 2000 (Skillset)

⁷⁸ A Snapshot in Time: Employment Census 2000 - National and Regional Analysis

⁷⁹ A Snapshot in Time: Employment Census 2000 - Sectoral Analysis

APPENDIX A - THE RESEARCH BASE

- A much higher proportion of employees than freelancers are women
 - 41% compared to 26%.
- Representation of women is highest in broadcast television and broadcast radio, and lowest in corporate production, commercials and facilities. Less than 10% of freelancers working in commercials and facilities are women.
- Less than 20% of both employees and freelancers are women in broadcast engineering, art and design, camera, lighting, postproduction and sound.
- 6.4% of all employees and 5.6% of freelancers belong to ethnic minorities.
- Ethnic minority representation is lowest in animation, commercials and corporate production.
- In London, ethnic minorities make up nearly one-quarter of the population of working age, but only 8.7% of employees and 7.7% of freelancers in the audio-visual industries.
- An estimated 0.9% of employees and 0.4% of freelancers across the industry are reported as disabled.

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Total Employment

An estimated total of 115,769 people were working in the audio-visual industries on 19 May 2000. Of these, 40,981 (around 35%) were freelance. Earlier Skillset research⁸⁰ indicates a further pool of at least 20,000 freelancers who would have been economically inactive on that day. This indicates that up to half the available workforce in the audio-visual industries work freelance.

Broadcast Television is the largest sector, with a workforce of 24,102, followed by Broadcast Radio, with 22,899, and new media with 19,966.

Figure 2

Employment by sector (employees and freelancers)

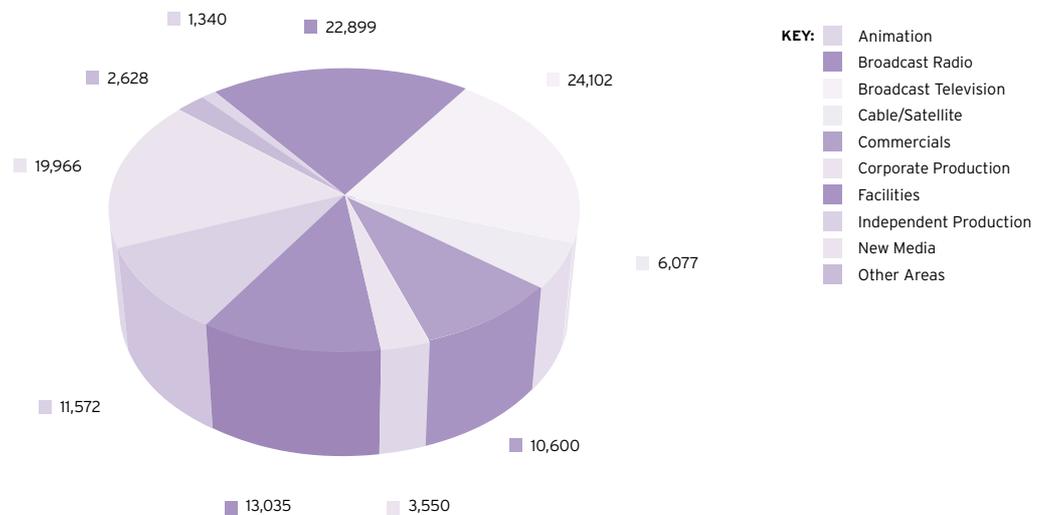


Figure 2 shows the breakdown of the total workforce by main sector of employment. The sector 'new media' is defined in its strictest sense as digital content creation and hence the figures for that sector underestimate the total employment therein. Reliable information is not currently available from the Census on the following sectors, but will in future be collected within all parts of Skillset's research programme: feature film production, cinema exhibition, cinema distribution and computer games/interactive leisure software. Inclusion of these sectors and freelancers who were economically inactive on Census day would indicate total employment in excess of 200,000.

⁸⁰ Skillset 1994 Freelance Survey and 1998 Follow-Up Survey

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Figure 3 shows the total number of employees and freelancers in each occupational group on 19 May 2000. Production is the largest key occupational group, employing 15,066, followed by journalism and sport (11,518), new media (10,901) and producing (10,137).

Figure 3 Total numbers of employees and freelancers working in each occupational group on Census day

Occupational Group	Employees	Freelancers	Total
Producing	6,531	3,606	10,137
Production	6,419	8,647	15,066
Journalism and Sport	9,277	1,881	11,158
Radio Broadcasting	6,037	2,756	8,793
Television Broadcasting	2,684	225	2,909
Programme Distribution	269	12	281
Transmission	869	35	904
Broadcast Engineering	2,330	245	2,575
Studio Operations	1,431	193	1,624
New Media	7,592	3,309	10,901
Animation	334	236	570
Art and Design	1,208	1,919	3,127
Camera	965	2,273	3,238
Costume/Wardrobe	58	816	874
Library/Archives	1,202	159	1,361
Lighting	1,401	7,159	8,560
Make Up and Hairdressing	106	798	904
Post-Production	4,050	1,498	5,548
Sound	787	1,439	2,226
Special Physical Effects	204	23	227
Runners	651	1,478	2,129
Other Occupational Groups	20,382	2,273	22,655
Grand Total	74,788	40,981	115,769

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Employment Status

Figure 4 indicates the percentages of the workforce who are freelance in each sector and shows considerable variation. Less than a quarter of those working in broadcast television and broadcast radio are freelance, compared to over four-fifths of those in commercials and over half of those in independent production, facilities and corporate production.

It should be noted that the exclusion of feature film from the Census has a considerable effect on the proportion of freelancers among the total, as this sector is known to operate in a similar way to the commercials sector.

Figure 4

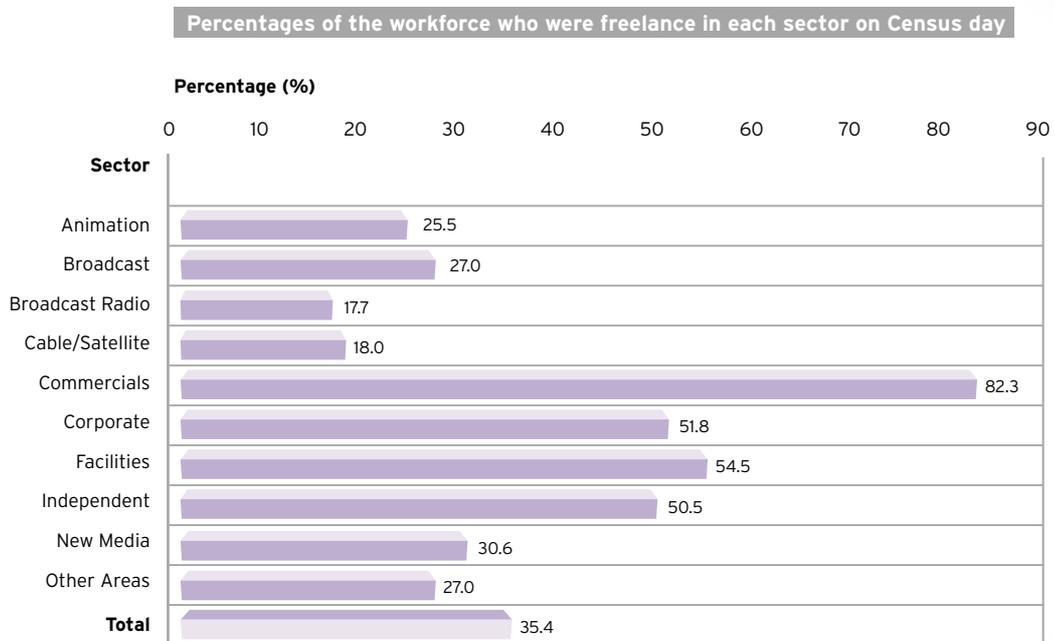


Figure 5

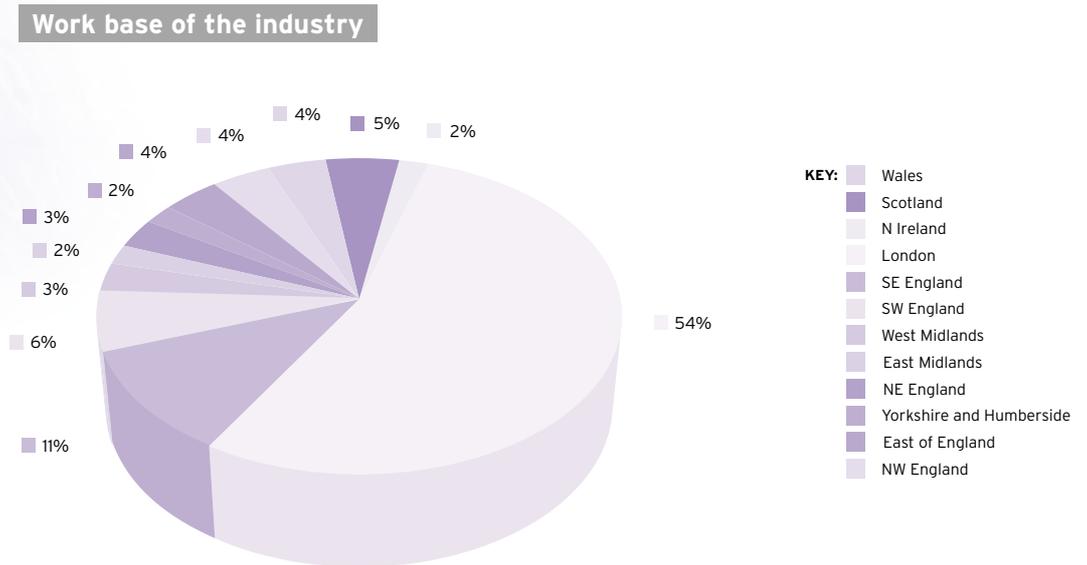


Figure 5 shows the breakdown of the workforce by work base. Over half the industry works in London, and nearly two-thirds in either London or the south-east. The remainder are distributed fairly evenly throughout the UK, ranging from 2% in Northern Ireland to 6% in south-west England. Although feature film is not covered by the 2000 Census, the majority of film production is known to be based in London and the south-east, and Scotland, which could further affect the uneven geographical spread of the industry.

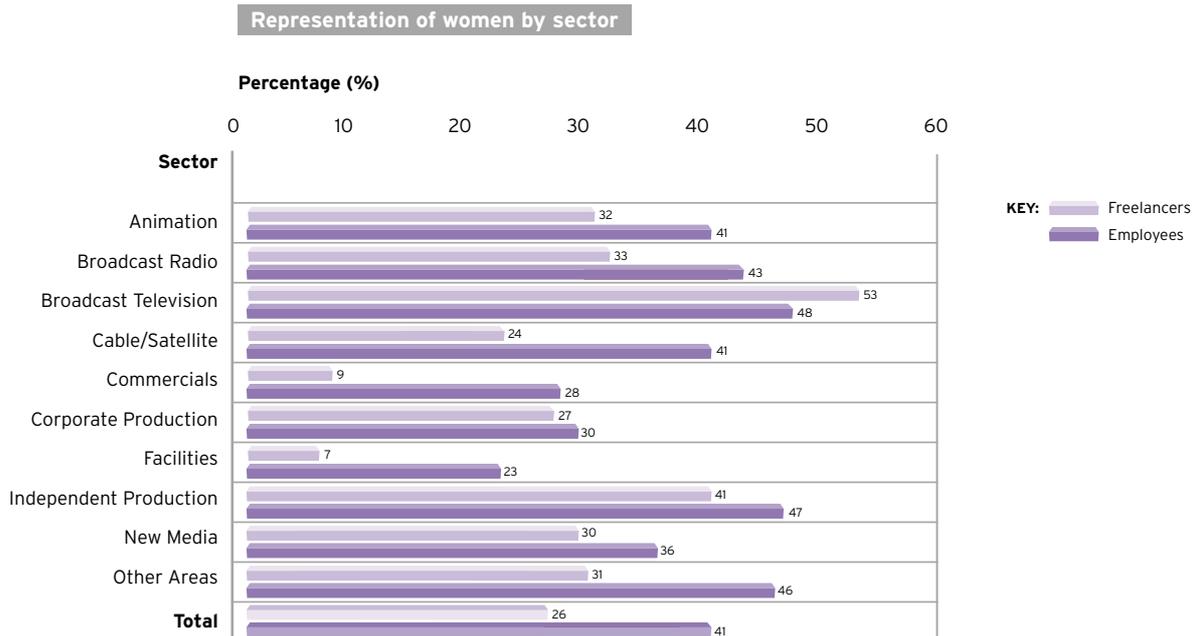
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Gender

On 19 May 2000, women made up just over one-third of the workforce in the audio-visual industries (36%), but represent a much higher proportion of employees (41%) than freelancers (26%). This compares with female representation of 45% of all workers in the UK economy - 47% of employees and 27% of freelancers.⁸¹

Figure 6 indicates the percentages of employees and freelancers in each sector who are women. There are considerable variations. Among the more 'traditional' areas, relatively high proportions of the workforce are women - for example, 48% of employees in broadcast television are women, 47% in independent production, and 43% in broadcast radio. Employment of women is lowest among the commercials, corporate production and facilities sectors. Representation of women is especially low in the freelance workforce in these sectors - less than 10% in both commercials and facilities. The Census has also revealed that employment of women is lowest in technical roles such as camera, sound and special effects, and highest in 'traditional' female roles such as make-up and hairdressing and costume/wardrobe.

Figure 6



⁸¹ Labour Force Survey, 9 August 2000.

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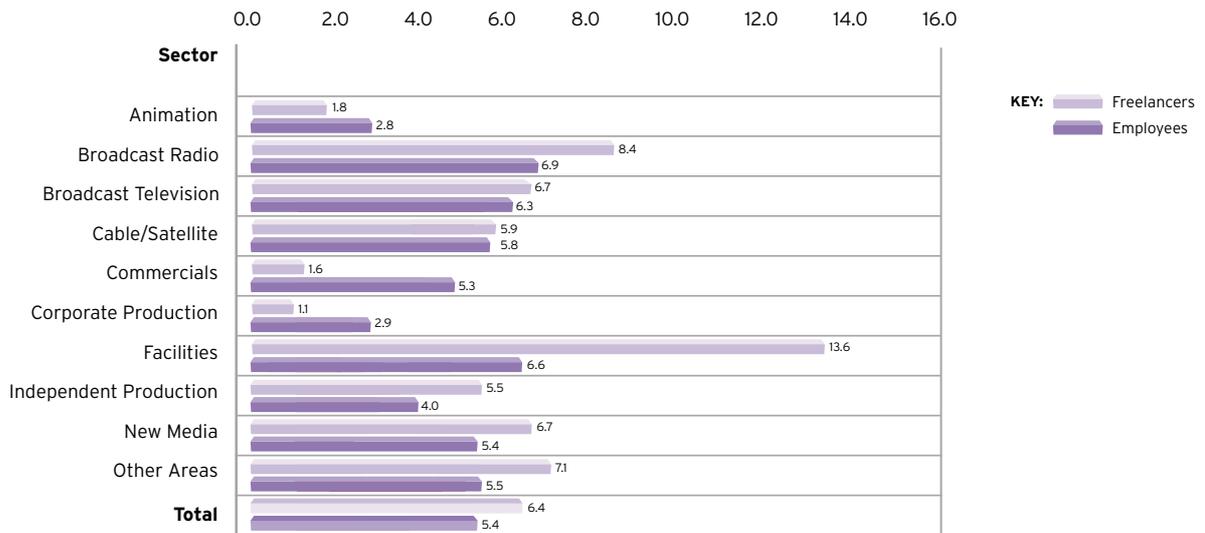
Ethnic Origin

In total, 5.4% of employees and 6.4% of freelancers in the audio-visual industries are of minority ethnic origin. This compares with 6.7% of the UK population of working age. However, as already reported, over half the workforce is based in London, where the local population profile is quite different. Nearly one-quarter (24.7%) of the population of working age in London is of ethnic minority origin,⁸² compared with 8.7% of employees and 7.7% of freelancers in the audio-visual industries.

Figure 7 illustrates the representation of ethnic minorities in each sector of the audio-visual industries. There are major variations here, as with gender representation, with animation, commercials and corporate production employing the lowest proportions of ethnic minorities.

Figure 7

Representation of ethnic minorities by sector



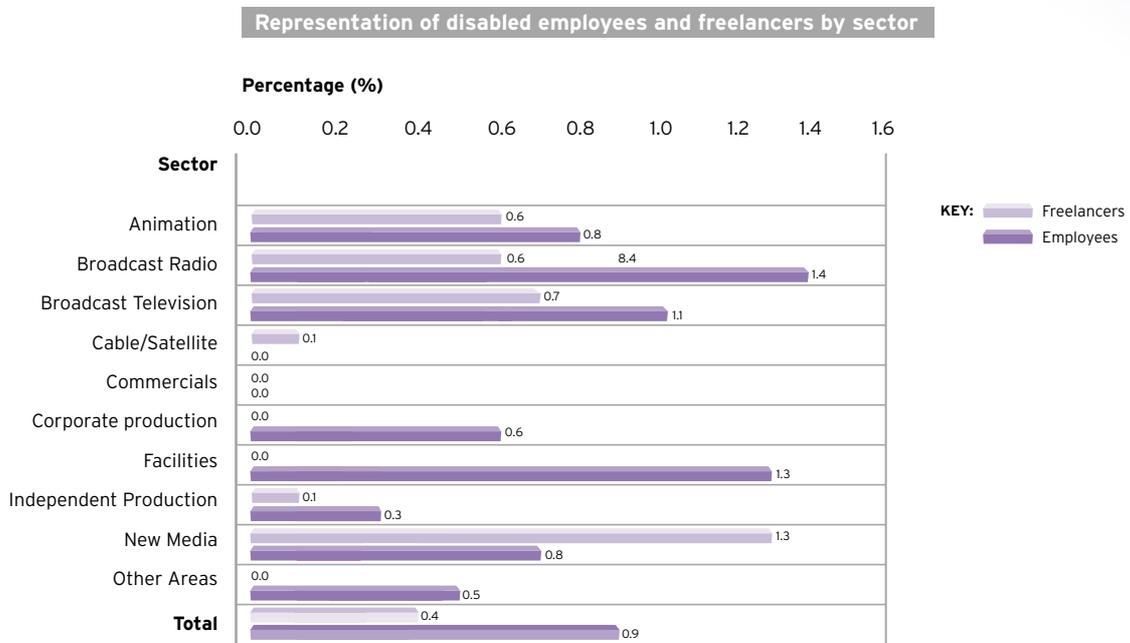
⁸² Labour Force Survey, (August 2000).

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Disability

Figure 8 shows the percentages of disabled employees and freelancers across the whole industry and in each sector. Overall, 0.9% of employees were reported as disabled on 19 May 2000, and 0.4% of freelancers. The lowest representation is in commercials, where no-one was reported as disabled, and cable and satellite, where no employees and 0.1% of freelancers were reported as disabled on Census day. The highest representation is in new media (0.8% of employees and 1.3% of freelancers) and broadcast radio (1.4% of employees and 0.6% of freelancers) and broadcast radio (1.4% of employees and 0.6% of freelancers).

Figure 8



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APPENDIX B - SECTORAL REPORTS AND RECOMMENDATIONS



APPENDIX B - SECTORAL REPORTS AND RECOMMENDATIONS

1. TELEVISION

Introduction

Television production takes place within broadcasting companies, cable and satellite TV companies, and in over a thousand independent production companies. Recent Skillset research⁸³ has estimated around 24,000 employees of broadcasters, 6000 of cable and satellite companies and nearly 12,000 of independent producers. The broadcasters are all major employers, as are many of the cable and satellite companies, but the majority of independent production companies are SMEs.

Employment patterns differ considerably between the three areas, reflecting the history of the sector. Until the 1980s, broadcasting and production were exclusively the responsibility of the public service broadcasting system. All the institutions concerned - the BBC, ITV and, from 1982, Channel 4 - took their responsibilities for recruitment and in-house training seriously.

During the 1980s, two developments changed the nature of the sector. New satellite and cable broadcasters, with no in-house production capacity, sourced their British programming out of house. The development of the independent production sector, following the arrival of Channel 4, was reinforced by a 25% quota for independently produced programmes on the new channel.

In the beginning, employees of the independent production companies had, for the most part, learned their trade under the old system. But, by the 1990s, these companies became major recruiters of new talent for the industry and developed their own ways of working.

So, there are two industrial traditions in the television production sector - one the product of the industry's regulated public service background, the other the product of deregulation and change in the 1980s and 1990s.

The major terrestrial broadcasters still, for the most part, reflect the older tradition, with good in-house provision of training and relatively stable workforces, but there is now a substantial freelance labour pool servicing the whole broadcasting market, and no such commitment to in-house recruitment and training by many of the new players in the sector.

Around 18% of those in both broadcast TV and cable/satellite were recorded as working freelance in Skillset's 2000 Census, compared with over half of those working in independent production. Representation of women is considerably higher among broadcasters (57%) than among cable and satellite companies (38%) and independent production companies (44%). The same is true for ethnic minorities, which stands at 6.4% in broadcast TV, 1.3% among cable and satellite companies, and 4.8% in independent production.

⁸³ A Snapshot in Time: Employment Census Skillset 2000

Carlton Technical Operators Training Course

Carlton Television's Operations Department has developed a range of highly successful tailored courses for new recruits, in conjunction with BBC Wood Norton. The 'Technical Operator's Induction' aims to produce people with an excellent grounding in the necessary skills to carry out their roles much sooner than has traditionally been the case. The training is highly intensive and completely geared to Carlton's operational needs.

Applicants are selected via an assessment day built around practical tests with on-going assessment carried out to track percentage improvement. Mentors are then assigned to candidates to support them and monitor progress.

The training programme has led to higher staff retention within Carlton as potential is recognised and rewarded earlier in careers.

Key occupational groups and skill areas employed in television production include scriptwriting and editing, producing and production roles, directing, camera, sound, lighting and studio operations, as well as a wide range of 'support' roles.

Current Provision

Further and Higher Education

Television production is becoming a predominantly graduate sector. For example, a recent survey⁸⁴ of freelance employees indicated that over half those working in broadcast TV hold a first degree. In independent production the proportion is two-thirds; in cable and satellite it is three-quarters. Around a quarter of the workforce also holds a postgraduate qualification. The majority of postgraduates have a degree founded in the media and communications area, but most recruits who join the sector direct from a first degree course are unlikely to have studied a media-related subject.

A common theme in employers' responses to the AVITG consultation process was a perception that media studies courses did not reflect society's needs. Educators point out this is based on a misunderstanding of the academic purpose of such courses. These issues are discussed in **Section B3**.

What is certain is that television production, like the other audio-visual industries, will increasingly be recruiting new entrants with a first degree. Strengthening mutual understanding between the education system and the sector is a priority.

Employer-Based Training for New Entrants

Large employers such as the BBC have comprehensive training programmes. It used to be said that the BBC 'trained the industry' and, although that is no longer the case, the BBC still sets standards that are hard to match. It's training tradition and resources are national assets that can play a key role in addressing skills needs.

The ITV licensees, Channel 4 and Channel 5, also have strong training commitments, built into their licences from the ITC.

These large companies expect to satisfy the bulk of their training needs from their own resources. The BBC recruits over 400 trainees on around 20 regional and national schemes. Across all the Carlton regions there are approximately 100 trainee places, and Granada recruit and train on average 150 new entrants.

Open recruitment policies are the norm for their traineeship schemes. Employers will normally seek recruits with the motivation and capacity to learn, rather than an immediate readiness to contribute. The companies recently recognised that there is still some way to go to achieve fully inclusive

⁸⁴ Skillset Freelance Survey 2000

FT2 New Entrants Technical Training Scheme

The FT2 New Entrants Technical Training Scheme is a well established scheme that trains people to become freelance technical assistants in film and television. An apprentice-type scheme, trainees spend up to 80% of their 2 year training with practitioners in feature films, television productions, commercials and corporate and promotional videos. The remainder of the programme is spent on specially developed short course training and assessment for the appropriate Skillset Professional Qualification. Based in London, the scheme draws recruits from across the UK. No qualifications are required and the primary criteria for acceptance on the scheme are talent, demonstrable commitment, determination and practical knowledge of the industry.

The scheme is funded by Skillset's FTF, the SIF, European Social Fund and Channel 4.

employment policies by setting up the Cultural Diversity Network and by agreeing diversity targets.

The majority of entrants to the industry now begin their careers in a less formal way, often on an ad hoc basis with independent production companies that have very short-term needs. In many cases, structured training for recruits is conspicuous by its absence. Whereas there are advantages of on-the-job experience in a variety of small companies, it usually needs to be supplemented by more formal learning. Nor does an ad hoc approach to recruitment widen the class and gender base of the industry.

In other skill areas and occupations, Modern Apprenticeship schemes are providing a useful structure for non-graduate new entrant training and employers are supported by a network of 'Open' Assessment Centres which can offer NVQs/SVQs and (increasingly) the key skills and off-the-job training packages.

Some of the Skillset-recognised national/regional consortia provide a service to smaller companies. In addition to NVQ/SVQ assessment to support apprenticeship programmes, key skills delivery and off-the-job training, the consortia also co-ordinate the contractual and monitoring activities necessary to support these programmes. However, funding and resource constraints limit the scope and effectiveness of what is done.

Industry-led Schemes

A small number of industry-led schemes operate to provide the independent production sector with a pool of well-trained freelance technical and production workers. Designed and operated as joint ventures between broadcasting employers, unions and not-for-profit training providers, they offer some of the most highly-valued methods of developing employable skills.

Like apprenticeships, the trainees on these schemes are attached to a variety of productions over an extended period (anything from 15 months to 2 years) and paid a monthly allowance. Practical experience is supplemented by intensive short courses and assessment for the relevant Skillset Professional Qualifications (NVQs/SVQs).

Educational qualifications are not a requirement for access to these schemes, which operate proactive equal opportunities policies, drawing trainees from diverse backgrounds. However, the competition for places has now created a situation where the majority of successful applicants are educated to first degree level.

The majority of training places available are in London, reflecting the location of the industry, with smaller schemes operating in Scotland, Wales, Yorkshire, the Midlands and the South-West. These schemes remain the exception rather than the rule.

Bespoke Training model: YMTC

Yorkshire Media Training Consortium's regional training strategy is based on quantitative and qualitative industry research, enabling it to pinpoint skills gaps and priorities and develop innovative solutions to local needs. YMTC's bespoke training approach plays a major role in this: a Training Needs Analysis (TNA) is available to individuals and on the basis of this, YMTC will source the best training solution for individuals. For example, it will support them to attend courses, find an attachment or mentor or, if there is a common need, to buy-in appropriate training. YMTC's Media Managers' Programme also offers bespoke company development solutions and consultancy to key managers facing the digital challenge.

Professional Training for Experienced Practitioners

Training provision for professionals in the industry is diverse. Employees and known freelancers working for larger companies with in-house training facilities have access to high-level training support, but relatively few companies apart from the broadcasters provide such an in-house function.

Other employees and freelancers rely on a relatively small number of professional training providers offering specific production and technical training. Many of these training providers are based in London and the south-east. Elsewhere, professional training is often coordinated and/or commissioned by the Skillset-recognised national/regional consortia.

Skillset manages the FTF, established and funded by the industry in order to subsidise training for freelancers. This supports short courses for professionals in the industry, as well as new entrant training (see above).

One of the most effective examples of good practice has been the 'bespoke' training model developed by Skillset's regional partners over the past 3 years. This identifies the needs of each freelancer through a structured training needs analysis (TNA). Once learning needs have been identified, flexible solutions are developed, offering the location, timing and method of learning that best matches the individual's needs and work schedules. In most instances the need can be met by an existing off-the-shelf course. However, this approach also allows for individually tailored solutions, including coaching, mentoring and work placements. All training solutions are subsidised to overcome the barrier of cost.

The FTF subsidy usually covers around 60% of the cost. The individual contributes the balance, but cannot be compensated for loss of earnings during training. Major employers, notably the BBC, are developing online training materials that could ease the financial and time burden for freelancers.

Skillset and other partners are exploring new ways of supporting experience-based training for professionals who need to move on or up in their careers. In **Section C10**, AVITG suggests ways in which OFCOM, working with the sector, might be able to support the provision of such training.

Gaps and Shortages

In spite of the popularity of the sector and its attractiveness to graduates as a career option, some employers continue to report difficulty attracting new entrants of a suitable calibre. Small companies are particularly reliant on a well-prepared graduate labour force because they often lack the resources to introduce their own entry-level training schemes. This indicates a mismatch between industry need and the quality and complexion of current provision.

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The number of places available on industry-led training schemes does not currently meet demand and is constrained by the available investment. Typically, such schemes are funded by industry investment, managed by Skillset (e.g. the FTF), supplemented by funding from the European Social Fund. However, European funding is unpredictable and its eligibility criteria do not always match easily with industry need.

It is also unclear how effective existing training schemes have been in meeting the industry's needs. Where public funding is involved, Skillset has the resources to monitor the value of the investment, but it lacks access to the additional resources to kitemark the effectiveness of a range of courses in the private sector (**Section C9**).

At the same time, the public funding routed to support Modern Apprenticeships is largely inappropriate. The existing tariffs do not reflect the high cost of training in the sector, and the predominance of graduates and freelance employment status present further barriers.

Skillset research has highlighted a number of skills in short supply in television production. These include:

- graphic design
- producer-directors (as a dual role)
- scriptwriting and editing
- production management
- sales and marketing
- business management
- single camera directing
- production assistants
- freelance make-up artists (outside London)
- health and safety.

The nature of the sector means that those most in need of training (freelancers and those working in small companies) are least able to afford the cost of training and to spare the time it takes.

Many employers believe there will be severe skills shortages in years to come because of the increasingly casual nature of work in the sector.

Recommendations

OFCOM should monitor training and education investment by all broadcasters, with particular emphasis on the investment made to support cross-industry strategies and the training and development of freelancers.

The BBC should review its overall training provision and open up as many of its training programmes as possible, starting in the autumn of 2001.

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Commercially funded licensed broadcasters should work with Skillset and OFCOM, when established, to set up schemes to support and provide industry training, both nationally and regionally.

The DCMS HE/Creative Industries Forum should seek practical ways of encouraging closer links between HE and the television production sector.

Skillset should:

- work with education providers to ensure closer links between FE/HE and the television production sector. In particular, a system of accreditation (by course or by unit) should be introduced which will enable employers and students to identify courses that meet predetermined industry standards as part of their programmes. The nature of this accreditation should be determined by the sector, in consultation with FE/HE, by the autumn of 2002;
- seek the resources to kitemark a range of 'on-the-job' training programmes, reflecting the needs of the sector. These should include an expansion of industry-coordinated new entrant training schemes and employer-delivered apprenticeship/graduate recruitment schemes;
- address the need for a better system of quality control of existing short course provision as a matter of urgency;
- promote the value of maximising the industry investment managed through the FTF by matching it with government funding for individual learners through mechanisms including Individual Learning Accounts.

The Training Consortia Network should:

- explore new approaches to training and development for professionals, including work experience programmes, mentoring and online/distance learning programmes, which reduce the cost burden on freelancers of receiving training.

2. BROADCAST ENGINEERING

Introduction

Around 10,000 people currently work in engineering roles in the audio-visual industries. Of these, around three-quarters work in equipment manufacture (in around 300 companies) and one-quarter in broadcasting/cable and satellite (in around 50 companies). Engineering does not have the same reliance on a freelance labour force as other sectors, with over 90% of people employed on permanent or long-term contracts. Engineering remains one of the most male-dominated occupations within the audio-visual industries, with men making up around nine-tenths of the workforce.⁸⁶

The two elements of the broadcast engineering sector are fairly discrete and use skills in different ways:

- Audio-visual manufacturers utilise a wide range of skills, including manufacturing-specific and sector-specific skills. Manufacturing skills include production engineering and control, mechanical design, project management, design drafting, and testing. Audio-visual industry-specific skills include audio and video circuit design (now primarily digital, but with a continuous requirement for analogue understanding), radio frequency (RF) circuit design, computing and IT software and hardware design, broadcast equipment operational skills, broadcast audio-visual system design, and broadcast/audio-visual sales skills.
- The broadcast sector employs engineers to broadcast programme streams. Some companies have technical facilities to create, edit and transmit the programming, whereas others provide only the technical facilities, along with the provision of the necessary technical operation staff. Engineers are employed to set up, operate, maintain and update technical facilities. These include video and audio studios (including outside broadcast systems), and editing and transmission systems. Within those facilities, engineers are used to maintain, quality check, test, repair and update systems.

The broadcast sector no longer uses any manufacturing-related skills, but the manufacturing sector does need access to broadcasting skills in order to understand current practice.

Current Provision

Over one-third of employees in both broadcasting/cable and satellite and equipment manufacture hold a postgraduate or undergraduate degree in engineering, and around a further 13% in each sector hold equivalent qualifications in other disciplines. Between 15 and 20% in each sector hold a diploma or HND/HNC.⁸⁷ This highly qualified workforce is supplied from a wide range of FE/HE institutions throughout the UK.

⁸⁶ A Snapshot in Time: Skillset/DCMS Employment Census 2000

⁸⁷ Skillset 2000 Survey of Employers of Engineers in the Audio-Visual Industries

Broadcast Technology Training: Links with Higher Education

The Higher Education sector has for many years attempted to provide suitable vocational courses for the broadcast industry. However, a lack of funding has often led to an undue emphasis on media theory rather than media practice. BBC Training and Development recognised the value of HE courses in equipping graduates with a higher skill/knowledge level when commencing training courses. Partnerships have been established with a number of universities which have now designed new vocational courses and utilise BBC facilities to enhance existing degree programmes.

The benefits to the industry are:

- Shorter training courses;
- Guaranteed pool of talent;
- Opportunities for students to receive sponsorship from the industry;
- A higher profile for Broadcasting as a career;
- Engineers with increased skills/knowledge.

However, in the context of a doubling of undergraduate entrants throughout the whole higher education system between 1988 and 1998 (and a 300% increase in enrolment on IT courses), enrolment on engineering degree courses has increased by only 19%. This represents a fall in the share of the total HE entry cohort from 11% to 6% between 1988 and 1998. Between 1997-1998 and 1998-1999, enrolment in FE engineering courses actually dropped from 310,500 to 281,900.

A recent Skillset survey asked employers of engineers about their investment in training, and their training priorities for engineers. It established that training expenditure is similar to the £700 per head in the wider UK engineering industry,⁸⁸ with equipment manufacturers funding training in a wider range of areas than broadcasters. Both sectors cited updating of technical skills and health and safety as major areas of investment, with training for equipment design and manufacture a priority for equipment manufacturers and training in digital techniques a key area for broadcasters.

In the early days of broadcasting it was the large pioneer companies, such as EMI, Marconi and the BBC, who 'trained the industry'. The 1960s saw many larger companies move away from broadcast product, followed in the 1980s and 1990s by further fragmentation. This has resulted in a proliferation of small and medium-sized enterprises, many of which have been set up, managed and resourced by people initially trained by larger employers, but who themselves now lack the resource to invest in training to the same degree.

Gaps and Shortages

There is overwhelming evidence from a range of sources of a genuine shortage in supply of appropriately qualified engineers to the audio-visual industries. One apparent reason for this is an increasing problem with the image of engineering as a career. Research by the Engineering Manufacture Training Authority (EMTA) conducted in 1998⁸⁹ reported that only one in seven pupils aged between 7 and 11 would even consider engineering as a future profession.

This problem is compounded by competition from other disciplines that are seen to lead to careers perceived as being more glamorous or better rewarded.

As one major broadcaster explained, in a recent Skillset study:

'There is an increasing lack of broadcast engineers - everyone is going into web design engineering courses'.⁹⁰

The effect of competition kicks in again when graduates with generic technology skills and appropriate credentials choose the engineering sector in which they want to work. In particular, emerging and expanding sectors such as IT and computing are reported to be attracting many graduates away from broadcast engineering, again for reasons associated with image and remuneration.

⁸⁸ EMTA 1999 People's Skills Scoreboard

⁸⁹ EMTA 1998 'Views of Engineering as a Career'

⁹⁰ Skillset 2000 Employer Panel

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For example, one equipment manufacturer recently reported that:

'The competitive nature of the business does not allow remuneration to be as high as in the highly recompensed IT business. Graduates are heading to those industries rather than broadcast.'

This is reflected in a recent editorial comment in *Image Technology*:

'There have been serious concerns about skills shortages in this area due to an ageing workforce and the attractiveness of the dotcom sector to technology graduates.'

One broadcaster has also highlighted the issue of an ageing workforce:

'In engineering, we have an ageing workforce, a large percentage of which is going to retire in the next 3 years.'

In addition to the apparent shortage in supply, concerns have been raised about the quality of engineering courses, as illustrated in this observation from a major equipment manufacturer:

'A well qualified and experienced programmer would still require 6 months of in-house training before they can contribute to the company.'

The perceived deterioration in quality of engineering graduates may be attributable either to a drop in course entry standards or to a decrease in quality of course provision. On the first point, recent figures show that engineering course entry standards are below those of many disciplines (for example, in 1997, 26% of entrants to engineering courses had 26+ 'A' Level points, compared to 44% of those entering mathematics and 31% of those studying humanities)⁹¹. A particular concern expressed by the Engineering Council on behalf of employers has been that the quality and quantity of work experience available needs to be improved for both undergraduates and new graduates. This has also been cited as one of the reasons for engineering graduates drifting into other sectors.

Recommendations

The broadcast engineering sector as whole, with Skillset's support and in association with EMTA, the NTO for engineering, should:

- improve and promote the image of broadcast engineering, in conjunction with the wider initiatives being undertaken, such as the Campaign for the Promotion of Engineering;
- work together to raise the profile of engineering in schools and among FE/HE course providers by articulating career pathways into and career opportunities in the broadcast engineering sector;

⁹¹ Engineering Sector Skills Dialogue Report (June 2000)

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- work closely with FE/HE institutions to ensure the creation of accredited centres of excellence for vocational education in broadcast engineering.

Equipment manufacturers should work more closely with broadcasters to ensure their staff have an adequate understanding of current practice in broadcast engineering.

3. RADIO

Introduction

Nearly 23,000 people work in the radio sector, almost as many as in broadcast television. The sector includes commercial radio stations, community radio stations and the BBC.

At the last count there were 297 radio stations, and, with the advent of digital radio, a further period of rapid growth is expected.

A majority of professionals in radio work on short contracts. Freelancers account for 17.5 % of the workforce.

The working population is based predominantly in London and the south-east, but employers are more likely to be geographically dispersed than in the audio-visual sectors as a whole. In radio 43% of employees are from ethnic minorities: 6.9% compared with 5.4% in the industry overall. Disabled employees make up a larger proportion of broadcast radio than in any other sector (1.4%, compared to 0.9%). It may be that radio, with its geographic dispersion and audio-only production requirements, can improve these figures still further.

There are a wide range of occupations in radio but they can be grouped into four main skill areas:

- Journalism (news and sport)
- Presenting and producing
- Sales and marketing
- Technology (engineering and IT).

Pre-Entry Training Patterns and New Entrants' Training

Many new entrants develop their skills in community and student radio stations. A new tier of access radio stations, being piloted by the Radio Authority, is likely to extend the range of training opportunities.

Most employment opportunities for new entrants are via the smaller stations. Although these are an ideal first stop for young people they do not provide specific training opportunities, so they must rely on recruits with some sector-specific developed skills prior to entry.

The larger companies, like BBC, EMAP and GWR, have well developed and resourced training centres/departments and have developed structured new entrants' schemes. The BBC and EMAP use the national occupational standards, and radio production/research NVQs; Modern Apprenticeships are used by EMAP to structure provision.

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Use of Skillset Standards and Qualifications in EMAP Radio

Emap Performance has developed a successful NVQ/Modern Apprenticeship programme. The MA programme is available to everybody who is eligible and EMAP has been able to recruit new people with high potential and equip them with skills and knowledge to further their careers.

More experienced people have also gained recognition for their skills and talent. Emap Performance offer NVQ programmes for those not eligible for a Modern Apprenticeship and have used various Government initiatives to co-finance this, such as Individual Learning Accounts.

The success of these initiatives is reflected in the larger than ever numbers registering for these programmes and in those achievers who having completed, progress on to other programmes to develop themselves further.

Both larger and smaller stations, however, increasingly look to radio-related FE/HE provision as a useful grounding for pre-entry training and education.

The BJTC accredits journalism courses for TV and radio and increasingly, in the field, new recruits are likely to come from BJTC-accredited courses.

Continuing Professional Development/In-Service Training

The larger companies are developing new models of training which include coaching and mentoring, and, in the area of sales and marketing, they offer in-company training by experts in these fields. The Skillset database of courses lists 124 courses relating to radio, covering subjects such as studio production, audio techniques for radio and radio journalism.

Gaps and Shortages

Employers have identified a number of skills gaps but no specific shortages. The gaps relate to skills 'underdeveloped' in new entrants; these are:

- voice and presentation techniques
- legal knowledge
- digital editing skills
- working styles
- research techniques
- web-page design
- analytical skills
- cultural awareness - of listeners from a wide range of backgrounds.

Sector Forum

Skillset and the Radio Academy have established a Radio Forum, a group of employers that meets regularly to discuss training and development issues.

Key Issues for the Sector

The predominant issue raised by the sector is the need for provision offered by FE/HE to be aligned with the needs of the industry. Current accreditation arrangements with the BJTC could be expanded/strengthened and/or new arrangements for radio production need to be explored. Courses that do not address the factors defined by the industry should be encouraged to do so.

Two-year vocational Foundation Degrees may have a particular impact in this sector.

Recommendations

Skillset and the Radio Academy should:

- undertake further research to identify the most appropriate ways of aligning the radio FE and HE courses with the needs of the industry, (e.g. accreditation of undergraduate and postgraduate programmes and/or the

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introduction of 2-year Foundation Degree programmes);

- support the training programmes offered by community radio stations and encourage them to link to industry standards and qualifications;
- promote the apprenticeship training frameworks as a tool to support structured on-the-job training for new entrants;
- ensure that existing good practice in training is more widely shared across the sector, with an emphasis on supporting continuing professional development.

Employers should:

- work with Skillset to ensure that careers information is up-to-date and available through **skillsformedia**, and other employer sector-based publications and services.

4. FILM

Introduction

The UK film industry has long been recognised for its highly skilled crew and strong creative talent base.

Over the last three decades, the structure of the industry has changed. In terms of training, there has been a move from 'apprenticeship' training by major employers and studios to a highly mobile freelance workforce attached for the short periods to production companies. The dramatic rise of independent production resulted in a rapid change in employment practices, with a large increase in the number of freelancers, who were required to provide their own training if they wished to maintain their skills. There was also an even greater shift towards unstructured and informal systems of training on the job.

The NFTS, delivering vocational training and education, meets some of the sector's needs. There are also structured new entrants' schemes and short courses for existing freelancers, supported through Skillset's FTF.

In addition, there have been a number of schemes to support the development of creative talent for producers and writers, such as First Film Foundation, ARISTA, the Performing Arts Lab and Moonstone, funded by a combination of Skillset's FTF, MEDIA and other public funds.

In 1997/98 an extensive joint industry/Government review of the UK film industry was carried out. A subgroup addressed the training and skills needs of the domestic industry. The findings highlighted the following areas as priorities for training provision and, where appropriate, assessment for relevant qualifications:

- Scriptwriters
- Script editors and development personnel
- Producers
- Production accountants
- Distributors
- Screen actor training
- New entrants - across all craft, technical and production grades
- Health and safety
- Skills updating and retraining for existing workforce - particularly in new technologies.

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VFG – Modern Apprenticeship Scheme

VFG has established a structured approach to training apprentice lighting electricians by using the Modern Apprentice Framework.

Apprentices are provided with on-the-job support, short courses in health and safety and technical knowledge and skills and attend college on a day release basis. They currently achieve their City & Guilds 1810 and 1840 and once they have been assessed on the job they receive their Skillset Professional Qualification - (NVQ) at level 3.

VFG receives funding as part of the Modern Apprenticeship scheme to cover costs of assessment. Skillset Freelance Training Funding is also granted to cover some of the off-the-job training costs.

Two areas were also highlighted to ensure that proper signposting was provided for individuals throughout the nations and regions of the UK:

- Skillset Professional Qualifications (NVQ/SVQ) - with assessment readily available throughout the UK;
- Education and practical qualifications - with courses developing proper links with the industry and providing effective careers information to students.

Developing the skills and talent base of the animation industry and other sectors of the film industry, including exhibition and sales, was also seen as key to securing the industry's future.

Current Provision:

The NFTS, which is supported by funding from DCMS, offers full-time courses in 11 specialisations and a wide range of short courses for freelancers through the National Short Course Training Programme (NSCTP).

There are also a variety of other courses throughout FE/HE that offer training and education in film. However, there is no one system for measuring the vocational or industrial relevance of these courses.

The national/regional media training consortia, like Scottish Screen and the NIFC, all offer or support training needs analysis or bespoke training for freelancers in the film industry. The levels of film production in each region or nation usually determine the scale of provision for film training.

There are two main training providers for new entrants into technical, craft and production grades for the UK industry, that are supported by Skillset's Investment Funds: FT2, based in London, and the Scottish Screen New Entrants' Training Course, in Glasgow. In addition, Cyfle in Wales and the YMTC are currently looking at ways to strengthen the film element of their new entrants' schemes.

These structured schemes consist of placements on production, short courses and registration/assessment for the relevant Skillset Professional Qualification. This ensures that each trainee enters the workforce after a period of up to 2 years as a skilled and fully prepared craft, technical or production assistant.

VFG Lighting at Pinewood Studios also runs an apprenticeship scheme, supported by Skillset, to train freelance lighting electricians. Skillset and VFG are currently looking at expanding this model to camera, grip and crane grades.

In addition to these schemes, a number of the UK Screen Commission Network members hold lists of local crew (including those willing to work at a runner level) on databases and in directories. However, there is no easy way

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of discovering how these individuals are trained when they are taken on to a production. Unless they join a new entrants' structured scheme, it is likely their only training will be through ad hoc experience on the job.

The SIF and the Film Council Training Fund, described below, support some of the short courses available to individuals working in or wanting to break into the film industry. Others are run through a combination of industry sponsorship, private investment or European funding. A full listing of all media and multimedia short courses throughout the UK can be accessed through either the Skillset or the BFI websites.

Skills Investment Fund

An industry initiative, managed by Skillset and monitored by Government, the SIF collects contributions (0.5% of total production budget, up to a ceiling of £39,500) from all productions either based in the UK or in receipt of UK public funding. The money is reinvested into training provision and assessment.

To maximise the success of the SIF the industry agreed the prioritisation of four areas for investment: new entrants, production accountants, health and safety and qualifying the industry (NVQ delivery and assessment).

Contributions to the SIF are voluntary unless the production is in receipt of public production funding. However, the SIF has the support of some key film industry organisations that have agreed to ensure that the SIF contribution is a line in the budgets for all the films in which they invest. These include BBC Films, Film Four and Sky Pictures. The trade associations, PACT and MPA, and the trade union, BECTU, are key partners in the SIF. The DCMS currently monitors its progress.

Skillset employs a Film Advisor to promote and facilitate payment of the SIF within the industry.

In its first 18 months (October 1999-April 2001) the SIF raised £950,000. The fund distributed just over £200,000 to established training providers to address the new entrants' strand and £130,000 to set up a new entrants' training scheme for production accountants, starting in July 2001, in partnership with The Production Guild.

An allocation of £95,000 of the fund has also been agreed to cover the direct costs of training and assessment for members of the SIF Trainee Network, due to be established in the Autumn of 2001. This will be a web-based service for trainee-level crew in the UK, providing industry-specific information and training and links with experienced producers looking to crew up for production. Skillset has also prepared an industry code of practice that will offer guidance to trainees and producers working together as a result of the SIF Trainee Network.

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The Network and Code of Practice is produced in association with BECTU, MPA, PACT and the Film Council.

The SIF Trainee Network will provide a long-overdue, much-needed and keenly anticipated service to an industry that needs to attract and retain talented individuals to develop and maintain its competitive edge.

This system will supplement the traditional word-of-mouth referral methods currently used by experienced industry practitioners. It will also have the merit of extending Skillsset's remit to promote good practice through training, assessment and information provision. The Network will bridge the gap between structured new entrants' schemes and the informal practices that have characterised recruitment and training in the past.

Targets for diversity and the grades/skills needed by employers will inform the membership of the Network.

Film Council Training Fund

The Film Council was established by the Government in May 2000 as the strategic agency for developing the film industry and film culture in the UK, underlining the importance of film as a key part of the UK's creative industries. It has two key objectives: to develop a sustainable UK film industry, and to develop film culture in the UK by improving access to, and education about the moving image.

The Film Council has allocated £1m each year for 3 years to a Film Training Fund. This has been allocated two priorities, also identified by the Film Policy Review:

- To address the training of scriptwriters and development personnel with the aim of raising the quality of scripts on offer to the UK industry;
- To equip producers, distributors and business executives with the skills needed for their sectors.

The Film Council Training Fund intends to expand the work of existing British and European training organisations by supporting a range of initiatives to achieve these objectives. Twenty percent of the training fund will be spent on schemes with European partners (e.g. MEDIA Plus, European Social Fund).

Support will be targeted at different levels. For example:

- The fund will work throughout the UK to ensure that foundation (i.e. 'basic') screenwriting skills training is available by promoting a model of best practice and by developing course literature;
- Another area of support will be through a system of bursaries for students attending postgraduate screenwriting courses. In order to target the

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investment effectively, the Film Council will jointly develop with Skillset an accreditation system for these courses;

- A programme of internships within independent production companies will be developed for screenwriters to enable them to experience the whole production process. There will also be an internship programme for 'junior development personnel' within production companies.

The Film Council Training Fund works closely with the Film Council development and production funds to ensure that training is an integral part of the productions and companies that it supports. It will also work with Skillset to implement the training strategy and to ensure it works alongside the SIF and other industry training initiatives.

Recommendations

Skillset, Film Council, Scottish Screen, NIFC, Sgrin and Media Skills Wales should work in partnership to:

- reconvene a training group from Autumn 2001, to ensure that investment in training is responsive to industry's changing priorities. In particular, the group will need to focus on the exhibition, sales and distribution sectors and the impact of digital and new technologies on the workforce and its skills needs.

Skillset should:

- collect authoritative data on employment patterns through the annual Skillset Census for the entire film industry, including exhibition, sales, distribution and front of camera. Arrangements should be put in place in 2001 for how this data will feed into the Film Council's Market Intelligence Unit;
- establish the SIF Trainee Network and Code of Practice with the SIF partners for producers and trainee-level crew working in the UK film industry;
- use **skillsformedia** to make available, throughout the UK, accurate careers guidance and information provision/signposting regarding training and assessment in the film industry.

Skillset and the Film Council should work together to:

- address and respond to the specific recommendations in the BSAC report *Achieving Diversity in the Film Industry*;
- build closer links between the film industry and educational institutions by developing an accreditation system for postgraduate scriptwriting courses, to be introduced for the 2002/2003 postgraduate academic year;
- achieve a coordinated approach to skills and talent development in the English regions with the regional training consortia and other film agencies.

5. JOURNALISM

Introduction

This report relates to a particular occupational group working across the different sectors of radio, TV and interactive media.

There are just under 13,000 journalists employed across the above sectors. The key occupational roles include:

- Researchers (on documentary/non fiction production)
- Journalists
- News presenters
- News editors.

Journalists are typically in permanent employment: 83% are employed on staff contracts and 17% work on a freelance basis. The gender breakdown indicates that 43% of journalists, researchers and presenters are women, and overall 7% are from ethnic minorities and 1% disabled. London is the key employment sector, with 46% of the occupational workforce; the remaining 54% are spread evenly throughout the UK.

Entry Patterns and New Entrants' Training

Pre-entry postgraduate vocational education is an important component of journalist training and is becoming more prevalent. Courses tend to be approved by the BJTC.

The BJTC does not impose a particular syllabus or delivery programme but sets out criteria to inform the delivery of core journalism skills to an acceptable standard. There are currently five undergraduate and full-time postgraduate courses accredited by the Council, and a further five in process of accreditation. Each year a total of 400-500 qualified students graduate.

The suggestion of providing a two-year journalism Foundation Degree has received a mixed response.

Larger employers run well-structured post-entry training schemes. These include ITN, Carlton and the BBC.

Although the journalism standards are used to inform training and are used by several colleges and universities in conjunction with BJTC accreditation, the NVQs have not been taken up by the sector as a whole. However, many researchers working in documentary provision are working towards the qualifications.

CPD Funding Professional Development/In-Service Training

In contrast to the effectiveness of the pre-entry training system, little continuing training takes place within broadcast journalism. In a sector that is changing and consolidating rapidly as a result of the development of digital technology, the need for journalists to regularly refresh and update their skills is not in doubt.

Large employers such as ITN, the BBC, BSkyB and EMAP provide refresher and skill extension courses, and the NUJ has also developed a series of training programmes aimed at professionals.

For researchers in news and documentaries, as well as journalists, the need for legal knowledge is paramount.

The BJTC is considering developing standards for mid-career courses and will extend its accreditation framework to include these. A commitment by every section of the industry to help develop such courses, both in-house and through local colleges, would represent a major step towards addressing this imbalance in overall provision of broadcast and journalism training.

Skills Gaps and Shortages

- Researchers in documentary and non-fiction production with research skills and legal knowledge
- Legal knowledge for journalists
- Web-based writing/journalism skills.

Sector Forum

The BJTC was set up in 1985 and represents those who deliver the courses, the NUJ and the broadcasters, including BBC, ITN and IRN. Skillset has now joined the Council and will work with the BJTC to assist in any existing and new developments.

A Journalism Forum has also been established by Skillset and the Publishing NTO, for employers in all sectors to look at common issues and potentially to agree a common approach to vocational education and training.

Key Issues

Student Funding

Rising tuition fees have put real pressures on a system that is heavily reliant on pre-entry training. The most common pathway, as has been described, is through a specialist postgraduate/MA course. The sector has approved this approach because students specialise in a vocational course after completing an academically focused first degree. However, the costs of studying as a postgraduate are becoming prohibitive: graduates from these courses will typically build up large debts.

ITN – Bursary Scheme

ITN run a new entrants' scheme to train Broadcast Journalists and has also been an active member of the Broadcast Journalism Training Council, lending their weight to the accreditation of undergraduate and postgraduate courses.

In recognition of the effectiveness of the accreditation model and the need for funding assistance aimed at students on postgraduate courses, ITN has now introduced a system of student bursaries.

ITN can now be sure of the quality of the courses that receive approval. They add value by providing work experience and expertise and are able to ensure that students with potential are not disadvantaged by the lack of funds to pay for the courses and subsistence.

A number of recognised courses have noticed that their applicants are being drawn from an increasingly narrow segment of society - students whose parents can afford to pay the fees. It is a problem exacerbated by the low starter salaries in journalism. There is a real concern that the long-term consequences of these factors will be an industry increasingly remote from some groups in society.

Funding Alternatives

The BBC also continues to operate a fully-funded Broadcast Journalism Training Scheme, which is run by BBC Regions and Nations on an annual basis and normally offers about 12 places. The scheme attracts between 5000 and 6000 thousand applicants each year.

BSkyB has recently launched the Sky News Student award, part of a major outreach project into schools and colleges. ITN is launching a scheme in 2001. There are other bursary and award schemes which provide financial support, but these are often isolated initiatives.

There is a potential funding model which is less uncertain.

Drama training has been chronically under funded for many years at every level. Those undertaking post-16 drama and dance training have, until recently, not been eligible for any form of grant. Following a concerted campaign by Equity, the Arts Council has provided a special funding scheme for young actors derived from lottery funding. Grants of £6,500 have been made to 830 students studying on one of 29 courses approved by the National Council for Drama Training (NCDT), an accrediting body which in many respects is very similar to the BJTC.

The courses, and the approved colleges, such as RADA, LAMDA and the Central School, are specified in the legislation, as is the role of the NCDT. Significantly, the money is also made available to postgraduate students. For instance, someone with a first degree in English or history may still qualify for the grant if they then choose to enter dance or drama training on one of the approved courses.

The scheme is now in its second year. In 2001, it is expected to provide funding for nearly 2500 dance and drama trainees.

The BJTC believes that a determined initiative applied to broadcast journalism, could have a significant impact in correcting some of the serious imbalances that are currently being created by the lack of support for postgraduate journalism education.

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Work Attachments

At the core of every BJTC course is the three week period of work placement, which is vital in helping the student to apply what has been learned in a practical everyday work environment. Recently, the Council has been experiencing problems with the provision of placements. If the industry is committed to effective training, the approved placement scheme must be seen as a crucial ingredient of the overall process.

Recommendations

BJTC and Skillset should work together to achieve the following objectives:

- Guaranteed work experience for students on accredited courses;
- Research into the impact of fees on recruitment to postgraduate journalism courses;
- Joint development of a pilot Skills Passport scheme in specific areas of journalism training;
- Kitemarking of mid-career courses.

Skillset should work with the Publishing NTO (representing journalists in the newspaper and magazine sectors) to:

- undertake further research to identify skill requirements, mobility and developmental issues across the sector;
- develop a journalism training strategy.

Governments should:

- investigate the feasibility of specialist funding for young journalists based on the model described for dance and drama training.

All employers should:

- continue with and/or consider the allocation of bursaries to support students on accredited courses, with a particular emphasis on access support for under-represented groups.

6. CONTENT PRODUCTION FOR DIGITAL MEDIA

Introduction

The fastest-growing sector of the audio-visual industries is digital media. As yet, there is no easy way of identifying the companies that make up this sector. Neither the Skillset Census nor other surveys provides a clear picture.

The period during which AVITG has met has coincided with the rapid rise - and, in some cases, fall - of new media companies. Descriptions of the sector include 'multimedia', 'new media', 'interactive media' and 'e-business'. Many 'traditional' media companies now employ a substantial number of employees working in 'digital media'. The estimate of the numbers of workers in this disparate sector as a whole is, at this stage, no more than an informed guess. It will be a major task for Skillset and other NTOs to improve the quantity and quality of labour market information in years to come.

No-one would deny that there has been an explosion of activity - both within established organisations such as the BBC and, particularly, in small businesses - that reflects the widespread take-up of digital technology. AVITG has been particularly interested in those companies that create, package and distribute content in a digital format: digital content production, an umbrella term for a range of activities. One of these areas, computer animation, emerged during the 1990s as a distinct industry sector in its own right and is discussed elsewhere (see **Appendix B7**). In time other areas will also evolve to form discrete sectors with their own traditions and working practices.

However, most areas have still to find their niche. In these areas, digital producers and packagers cannot easily be categorised alongside traditional media content providers. Their training and ways of working are in many ways, though not all, reliant on skills not needed in traditional media.

After examining the available evidence about skills needs in this area, AVITG found most useful the paper commissioned by the South East of England Development Agency (SEEDA) from consultants at Human Capital. Entitled *Skills for the Digital Media Industry*⁹², it is a comprehensive survey of the digital media sector in the south-east. AVITG's conclusions draw heavily on its research. A study for the London Skills Forecasting Unit, *Skills for London's Creative Industries in the Digital Age*⁹³, tells a similar story. A survey of 75 companies in the multimedia sector, carried out by IVCA⁹⁴ and using the approach of the People's Skills Scoreboard, gives a snapshot of current training provision. Research carried out for the National Skills Task Force⁹⁵ is also helpful.

Current Provision

Digital media companies are centred predominantly in London and the south-east of England. However, other Regional Development Agencies have identified this sector for developmental assistance. Significant clusters of

⁹² 'Skills for the Digital Media Industry', Human Capital (2000)

⁹³ 'Creative Skills: Skills for London's Creative Industries in the Digital Age.' London Skills Forecasting Unit, (2000)

⁹⁴ Peoples' Skills Scoreboard- Multimedia, IVCA (2000)

⁹⁵ National Skills Task Force Research Publications (SKT 6-25 and 29-38), (2000)

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companies are emerging in each of the English regions. An even higher priority to develop this sector has been set in Scotland, Wales and Northern Ireland, where the potential benefits of the new technologies are seen as a key to economic growth and regeneration.

Although London has the highest proportion of digital media companies, there is no necessary correlation between centres of digital media and centres of traditional media. In the south, Brighton is the most active centre for the digital media sector – not the traditional broadcasting centre, Southampton. Digital media companies in the south-east region, mostly small in size, employ as many people as older media companies. The estimated turnover in 1999 was higher than in traditional media.

Companies are expanding fast, with all the growing pains that usually accompany such progress. Several companies in the games and website development areas in the south-east had doubled their employee base between the first quarter of 1999 and the first quarter of 2000.

Skills needs tend to be influenced by the level of maturity in the area in which a company operates. There are digital media companies at all stages of development, and, as areas of the sector mature, skills needs change. Thus, in the relatively mature market of games development, the skills needed are radically different from those demanded by the high-growth area of web design and the emerging area of media for mobile devices.

In a start-up, graduates with high-level technical and creative skills and boundless enthusiasm are often key to success. As companies develop their businesses, more enduring management skills also become essential. The creative and technical skills of the first phase of growth need to be supplemented by generic business skills.

Another problem can arise where companies established in mature sectors such as TV production or animation need to adapt to the needs of the new digital markets. Here it is often necessary to supplement the existing skills base by recruits with experience of the new areas of business.

What are needed, at various phases of development, are four types of skill:

- Industry-specific skills which endure (such as editing content for websites);
- Industry-specific skills which are transient and specific (e.g. ability to use specialist software);
- Generic skills which are transferable across many industries (e.g. sales and marketing);
- Transient skills which are transferable across many industries (e.g. ability to use standard software).

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The prime requirement is for people who have a combination of enduring and transferable skills and the ability to learn transient and specific skills as needs arise.

Because so many of the existing digital media companies are small and young, there has not yet been time for a sectoral approach to address the skills issues. There is no tradition of companies coming together to tackle shared problems. Where there are fora for discussion and partnership, such as the Wired initiatives in the south-east, both employers and employees benefit.

Skills Gaps and Shortages

Despite the rapid growth of the sector, few companies in the south-east reported a shortage of potential recruits. Current recruits are often graduates with good degrees attracted by the potential of a growth sector. However, many companies - too small to run a comprehensive in-house training operation - did report a shortage of the right kind of applicant and, thus, very real difficulties of recruitment and retention. There are also skills gaps.

The major area where skills gaps were reported was - as elsewhere in the UK - ICT. There was also, unsurprisingly, no reserve of skilled labour that employers could mine at will. As a consequence, recent industry experience was rated by many employers more highly than formal qualifications. A good track record is both rare and highly valued. Poaching is common.

A third area where skills gaps have become apparent is in management. Project management was one problem. Another was marketing. These are the growing pains of a maturing industry.

A majority of small companies showed no enthusiasm for external training. This emphasis on on-the-job training meant both employees and employers lacked commitment to for certificate-based courses. It is common for new models of training to be employed in the workplace, using interactive and e-learning techniques.

In the longer term, the picture that emerges is of a sector moving so fast that it has not yet realised what will be needed to sustain development and to maintain momentum. As growth slows down and consolidation takes place, training issues will need to be given a higher priority for companies seeking a competitive edge.

A positive factor is that the current workforce has a high level of formal education. Most employers, when asked to consider their sector's skills issues, understand the value of a broad general education to degree level, particularly in ensuring the availability of a future workforce with enduring and transferable skills, capable of adapting as the sector evolves.

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Some degree courses offer training in vocational skills for digital media, but these were felt to be too few in number to be capable of meeting the long-term sectoral demand for vocational skills training. That said, the Human Capital report was compiled before the Foundation Degree initiative had been launched; this development may alter employer perceptions.

Currently, training in specific and transient skills is likely to be on-the-job or provided by private sector suppliers. Medium-sized companies spend more per head on training than do small companies.

There are currently few links between education and industry. Where such links exist, mutual benefits result.

Recommendations

Skillset should:

- pay special attention to improved labour market information about digital media in its next industry Census by identifying areas, such as games development, that should be treated as industry sectors in their own right;
- work with the Publishing NTO and Digital Content Forum;
- produce a more detailed assessment of the skills needed for the different areas of the digital media sector in order to create a better understanding of its disparate skills needs and evolving job descriptions;
- address the urgent need to improve management skills in the Digital Media sector.

Closer links should be forged between FE/HE and industry to ensure an adequate supply of graduates with the enduring and transferable skills suited for work in this sector. These should include industry accreditation, more structured careers advice, work placements, online mentoring, student sponsorship, visiting speakers, involvement in course development and joint research. The Foundation Degree initiative may have particular value for this sector.

Digital media companies should work with each other and with learning providers in representative organisations, such as Wired Sussex, to address the overall training and education needs of the sector in their nations and regions.

The Training Consortia should support initiatives to introduce short-course training which addresses specific skills gaps, such as the shortage of ICT specialists or the retraining needs of traditional media companies.

Aardman Animation and University of the West of England

With a track record spanning nearly 25 years, Bristol-based Aardman Animation is one of the UK's leading animation studios.

Aardman is only too aware of its obligations to the pool of freelance animation talent in the Bristol area. Ensuring the success of the south-west as a production centre is central to long-term strategy. As the company operates in a highly specialised field one of the ways it has sought to ensure continuity of supply of creative talent is by working with partners. One such relationship is the Animation Training Scheme it set up in conjunction with the University of the West of England. Aardman used this innovative approach to train animators for its successful feature film debut, *Chicken Run*.

7. ANIMATION

Introduction

Animation is a growing industry across the world. Like other audio-visual sectors, it relies heavily on a flexible freelance workforce. Very few animation production studios in the UK have a sufficient throughput to justify substantial full-time employment. Many animators will therefore move from one production company to another to work on different projects, which hinders their longer-term development of production skills.

New technology is revolutionising animation production. Production staff with traditional skills therefore need to keep continuously up to date with technological developments and acquire new computer and production skills as their careers progress.

Some animation production skills are transferable to other areas of audio-visual production. For example, the industry increasingly has to compete for skilled staff with post-production houses that offer special effects, and with the computer games industry. At present these industries can often offer more secure career paths and better salaries.

Current Provision

Formal Education Sector

A number of FE/HE courses offer training in animation. Some include animation as part of a wider syllabus, and others, particularly in FE, offer animation as a full-time option. However, many of these courses are non-vocational and do not aim primarily to equip students with technical skills necessary to move successfully into the animation industry.

Skillset's sector survey in 1998 found that most of these courses were focused on developing the creative skills of individuals, with the emphasis on the needs of directors. Skillset proposed that there should be more emphasis on the animation industry's need to develop skilled individuals who can work effectively as part of a creative team.

New Entrant Training

New entrant training has been developed through courses provided by the British Animation Training Scheme (BATS) and the London Animation School. These courses have been successful in providing training in drawn animation to assistant animators attached to studios. Hitherto BATS has enjoyed limited financial support from the BFI, but this relationship will end in September 2001 placing a question mark over its future. BATS' continued success depends on it being able to secure a longer-term funding deal.

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Cyfle in Wales, which is funded by S4C and TAC, the Welsh producers' trade association, has also been active in new entrant training. It offers training in conjunction with animation studios based on the Modern Apprenticeship model. Cyfle currently supports 1-year placements in animation studios coupled with formal education modules. It has also organised 'incubator' courses of 6 months' duration in the use of new computer technologies.

On-going Training

Most animation studios offer some form of on-the-job training, although this is mostly informal and unstructured. Some larger studios, such as Aardman Animation, Cosgrove Hall and Siriol, have been able to offer more formal training provision, but their ability to do so effectively is dependent upon an adequate throughput of production work. Smaller producers are vulnerable to losing workers with key skills unless they can secure a sufficient volume of work. Siriol has run a successful programme to give some of its existing staff new skills in computer animation with financial support from the European MEDIA II Programme.

Animation producers contribute towards training through the IPTF and, in the case of feature films, the SIF. Most of the funds raised through the IPTF go towards Skillset's FTF. Although animation production companies can benefit from general courses, so far neither the IPTF nor the SIF have been used to support specific training initiatives for the animation industry. This has caused some resentment and could lead to a greater reluctance on the part of animators to make voluntary contributions towards training funds. The Film Council also has funds to support industry training, but its training strategy does not include specific support for the animation industry.

Some European funding may be available to support training in the animation industry. However, the intention is that such funds should be used to support centres of excellence, with less emphasis on supporting studio-led training schemes, so funding is more likely to go to projects that have formal partnership links with the further education sector.

Skill Needs

New Entrants

Graduates often lack basic skills needed by the animation industry, with some being unable to understand the industry-standard 'dope sheet' and poor skills in drawn animation. Additionally, many new entrants lack the necessary team-working and collaborative skills needed for effective animation production. BATS has often played a remedial role in bringing graduates' skills up to industry-acceptable levels. This suggests there is a greater need for liaison between the industry and higher education courses to ensure courses are aware of industry practices.

New Technology

The animation industry is increasingly using new digital technology as the basis for production. This creates difficulties both for new entrants and for established animators, who need the skills to take advantage of new technology. Although online learning packages are available, traditionally trained animators need additional support in adapting their skills.

Writing and Development

There is a need to develop new talent for the key pre-production processes in animation, such as scriptwriting, storyboarding, design and layout.

Producers and Production Managers

There are weaknesses in basic business and production management skills. The CARTOON Masters programmes have been valuable, but there is an urgent need for more regular and formal provision.

Trainers

High-level animation requires a high trainer-to-trainee ratio. More trainers with industry experience are urgently needed. More use of mentoring on an industry-wide basis would also assist in sustaining continuous learning within a growing industry sector.

Recommendations

PACT should immediately ensure that the animation industry is represented on the joint PACT/IPTF Training Committee. The Committee should consider how proceeds from the IPTF might be used to support the animation sector.

PACT and SKILLSET should, before the end of 2001, jointly develop a training strategy for the animation production sector, involving representatives from other parties with animation interests, such as the Film Council, APA, IVCA, BECTU and broadcasters.

In developing the training strategy, consideration should be given to:

- whether the industry could benefit from Modern Apprenticeship schemes (similar to those operated by Cyfle) or the development of a trainee scheme similar to the Film and Television Training (FT2) Scheme;
- how the proceeds from the IPTF and SIF, to which animation companies are asked to contribute, could best be used to support specific training within the animation industry;
- how closer relationships could be developed between the animation industry and the FE/HE sectors, including consideration of industry placements and a possible industry endorsement scheme for suitable animation courses;

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- the establishment of an industry-wide mentoring scheme;
- whether any initiatives could be supported by European funding;
- what support can be given to existing training schemes such as those operated by BATS and the CARTOON Masters.

The proposed training strategy should address the following needs:

- new entrant training in the fundamental techniques of drawn animation;
- training provision for existing animators in new computer technologies and software packages;
- addressing skills shortages in preproduction processes, such as scriptwriting, design, storyboard and layout;
- effective training for producers and production managers, particularly in areas of business skills and budgeting; and the need for a 'training the trainer' programme.

8. PROGRAMME MARKETING AND DISTRIBUTION

Introduction

Television programme marketing and distribution has been identified as a key area of growth by industry and government. Britain is the second largest exporter of TV programmes in the world. In addition to programme licensing, the marketing companies now handle a range of other intellectual property rights, including home video and DVD, pay-TV, video-on-demand, and merchandising of toys, books and other items. Recently, the licensing of format rights to enable overseas broadcasters to make local versions of hit programmes, such as *Who Wants to be a Millionaire*, *Survivor* and *The Weakest Link*, have made a big impact in the US and many other markets. As well as boosting exports, television programmes such as *Walking With Dinosaurs* and *Hornblower* are flag-bearers for Britain overseas.

Programme marketing, which is traditionally described as distribution, is for the most part carried out by small companies. Even the largest units, such as BBC Worldwide, are small compared with the major American corporations that control film studios, TV production and networks. In May 2000, the British Television Distributors' Association (BTDA), the trade association, conducted the first-ever survey of the sector's training needs. Seventeen of the 20 companies contacted took part.

Thirteen of the companies surveyed had fewer than 25 employees; only one company had more than 150 employees. Eight of the companies had a specific training budget, which ranged from £800 to £100,000. Most smaller companies had no specific training budget. Induction training was carried out by most employers, although there was no consistency about who was responsible for running this. There was no standard approach to training issues.

Most staff had the opportunity to participate in an annual appraisal process. Training focused on clearly identified short-term needs, such as company induction or IT skills (10 out of 17 surveyed) rather than longer-term development needs such as 'cultural awareness' (2 out of 17). Less than half the sales staff in the survey received any formal training in negotiation skills. Language training was even less common.

Most staff received some practical training, particularly in basic IT skills. Management skills, negotiation skills, team building and financial awareness were also common ingredients of training courses where they took place. Training was usually an in-house activity, with cost inhibiting extensive use of external training providers. Of the external trainers used, none had worked for more than one company.

From the outset sales and marketing staff learn to carry responsibility on sales trips and at trade fairs. They also learn from colleagues in their own and

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competitors' teams. In the small distribution community, senior colleagues' willingness to share information and advice is a useful example of a successful informal mentoring system.

The use of work placement students was common. Only three of the companies did not offer some form of placement or work experience opportunity.

Skills Gaps and Shortages

Distribution companies on the whole must rely on existing broadly based training courses, often shared with other employees of a parent company. The major need highlighted by the 2000 survey was the lack of specialist training geared to the growing needs of the television marketing and distribution sector.

Small companies, in particular, found the cost of training prohibitive and were not persuaded that better-trained staff might lead to better performance levels.

The BTDA survey did not attempt to prioritise the needs of the companies surveyed, but it was clear that, although day-to-day training needs were usually met, the companies were aware that specific skills training - targeted at the particular needs of employees - was rare.

Overall, the clear message of the survey was that programme marketing and distribution lacks a training culture of its own, distinct from the general industry training provided by the larger employers. The existing culture, for the most part, reflects a tradition of 'gifted amateurs' - usually successful senior sales executives - whose key skills were networking, not necessarily negotiating or managing. The sector should not lose the mentoring skills of these individuals, but it has reached the stage of its evolution where it needs a more structured approach to training issues.

Recommendations

BTDA, with Skillset's support, should:

- identify the specific skills needed in the programme marketing and distribution sector;
- design specific industry-wide training to meet the needs of the sector, once these have been clearly identified;
- provide up-to-date careers advice about the distribution industry through **skillsformedia** and other routes to careers advisers;
- organise a short training course to be piloted in 2001/2, bringing together distribution executives across the sector;
- set up more structured work placement opportunities as part of a closer relationship with appropriate FE/HE courses;

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- organise territory workshops to increase market knowledge, opportunities and sensitivities;
- ensure that all marketing companies create opportunities for junior staff to have access to identified mentors.

9. ANCILLARY SERVICES

Introduction

Subtitling, signing and audio description provide vital services for the UK's hard of hearing, deaf and visually impaired population. They allow access to television - something most people take for granted.

The 1990 Broadcasting Act stipulated that ITV should subtitle at least 50% of all analogue programmes by the end of 1998. The BBC and Channel 4 made a public commitment to match these quotas. No such obligation was imposed on cable and satellite broadcasters. In 1997 the ITC increased the 50% target to 80%, to be met by 2004. Channel 5 is required to subtitle 50% of all programmes by 2002.

The 1996 Broadcasting Act set a target of 50% for subtitling for programmes on digital terrestrial television (10% for audio description and 5% for signing) within 10 years of the service starting. The Secretary of State can amend these targets by order, and the ITC has the power to set interim targets. All these targets are incorporated in a code drawn up by the ITC to promote the understanding and enjoyment of programmes by persons who are deaf or hard of hearing and blind or partially sighted.

Currently, over eight million viewers use television subtitles in the UK, some for whom English is not their first language. An effective subtitling service, properly promoted, would play an important role in ensuring these viewers are included in the 'knowledge society'.

Subtitling

Background

In 1979 ORACLE Teletext, in conjunction with the Independent Broadcasting Authority (IBA) and Independent Television Companies' Association (ITCA), funded a research project at Southampton University to investigate the most effective way of providing a subtitling service for hearing-impaired viewers. In the early 1980s ITV and BBC set up their own small subtitling units: at that time just 2 hours of programmes each week carried subtitles.

In 1983 the IBA stipulated that there should be more subtitled programmes, and by 1984 an average 8 hours a week of subtitles were being produced for ITV.

ORACLE pioneered live subtitling, going on air with news broadcasts in July 1987, and the BBC followed suit a year later.

Subtitling is split between features (pre-prepared programmes) and live. Features encompasses a wide range of programmes, e.g. drama, films, documentaries, and involves a subtitler viewing a time-coded video on a bespoke, integrated system. Usually one person will be responsible for the entire

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programme, inputting, editing the text to an appropriate reading speed, and synchronising text to picture. Prior to transmission, the subtitled programme will be checked to ensure it meets rigorous quality standards. The broadcasters are responsible for transmission; some encode subtitles on to their master tape, others insert subtitles into the transmission chain.

Live subtitling, where time is of the essence, provides different challenges. In contrast to pre recorded subtitling, there is more than one way to produce live subtitles and different channels employ different methods. The BBC and Channel 4 use stenography for verbatim news subtitling, whereas ITV uses velotype and fast qwerty methods. Voice recognition subtitling is also used by Channel 4 on live cricket and football coverage. The live teams working on news bulletins have access to incoming story feeds from home and abroad, to the output of the edit suites, to news gallery talkback and running orders, to story content and to newsreaders' scripts. All of this information is very fluid, with many programme items breaking near or during the bulletin. The subtitler or stenographer will then be hearing speech at the same time as the viewer, simultaneously translating it into an edited version and typing it as quickly and as accurately as possible for immediate broadcast. The range of live programmes being subtitled live extends to sport, chat shows, documentaries and political debates.

Gaps and Shortages

Subtitlers are usually graduates with a linguistic background. As well as newly qualified graduates, teachers, translators, writers and journalists have moved to a career in subtitling. It can take approximately a year to train new subtitlers as they gain experience and speed. An experienced features subtitler will produce between 1.45 and 2 hours of subtitling a week.

Live subtitling requires additional skills. Recruits must have the ability to type fast, think fast and edit text. They are also required to be able to concentrate and absorb several different types of information at one time (computer story updates, incoming feeds, gallery talkback etc.) Although stenography skills can be utilised, this system works on a standard vocabulary that can work for live news but which can fall down on wider-ranging 'live' talk shows. Live news subtitlers are particularly aware that less-than-accurate output in description or name terms could lead to accusations of at the least misrepresentation, at worst libel.

ITFC (serving Channel 3), Intelfax (serving Channel 4) and the BBC are committed to quality training in subtitling, but recruitment is not easy because of a lack of knowledge of the television subtitling process. Live subtitlers and stenographers require special skills, as outlined above, that are particularly difficult to find. In general, a lack of awareness of the importance of spelling, grammar, punctuation and general knowledge among many candidates does not facilitate recruitment.

Recommendations

There should be a single, consolidated campaign - using existing terrestrial channels - to heighten the awareness of the availability of subtitles.

The available technology has not kept pace with the growth in subtitling requirement. To enable the subtitling requirement to be extended to all broadcasters, a cost-effective solution has to be found. A joint forum composed of the broadcasters, suppliers, manufacturers and user groups should be formed to determine a way forward.

Legislation requiring a percentage of subtitling on **all** channels should be a Government priority, in order to achieve the government's stated objective of 'universal access to diverse services of the highest quality'.

An ancillary services module should be available to students in vocational post-16 education, as it is in some 'A' level syllabi.

British Sign Language

Background

BSL programming and access on television is still a relatively young sector. The BBC has had a regular weekly programme for Deaf and hard-of-hearing people, *See Hear!*, since 1981. Since 1984, Channel 4 has broadcast regular but shorter series for Deaf people - *Listening Eye*, *Sign On*, *The Vibe* and, beginning in 2001, *Vee-TV*. These programmes have brought on-screen and production opportunities to many deaf BSL users.

Between 1989 and 1993, Channel 4 and Tyne Tees TV sponsored the training of 17 deaf people in television production at the North East Media Training Centre in Gateshead. Some of these went on to work for *Sign On*, but, when the number of programmes declined, they eventually left the industry. One returning series makes a significant impact. *Vee-TV* employed six people on the production team and gave work to two dozen others on and off screen. Until the advent of digital terrestrial television (DTT), the number of Deaf people employed in television remained in single figures.

From the early 1980s, the BBC and some ITV companies provided BSL-interpreted news/current affairs slots. Most employed hearing interpreters, but Tyne Tees Television developed a pool of Deaf presenters and interpreters.

The 1996 Broadcasting Act set a 5% target for sign language by the tenth anniversary of the start of the service. The ITC can set interim targets, beginning with 1% in 2000. The BBC has committed itself to match these figures. At the moment the BBC employs five on-screen interpreters, all hearing, apart from one who is hearing impaired.

The biggest supplier of signing for DTT is Signpost, part of Tyne Tees TV. Working mainly with subtitling company ITFC, Signpost currently interprets

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about 20 hours per week of programmes for ITV, ITV2, C4, FilmFour, C5, UKTV, ITVdigital, Discovery and Nickelodeon. All of Signpost's translator/interpreters are Deaf. Two are full time, plus seven trainees (six full time) and a pool of 15 freelancers. Trainees are also being trained in other aspects of television production. Training is supported with funding from the regional development agency One North East and the European Social Fund (ESF).

Some broadcasters employ hearing interpreters on a freelance basis.

Gaps and Shortages

- There is a severe national shortage of BSL/English interpreters (only about 200 for a population of 60 - 70,000 Deaf people);
- There is a shortage of trained and experienced Deaf researchers with journalistic skills;
- The training of more interpreters is developing extremely slowly.

Recommendations

The ancillary services sector and Skillsset should audit BSL provision for Deaf people across all sectors of the visual media, including the Internet, identifying gaps and shortfalls, and enabling Deaf people themselves to prioritise future development.

Audio Description

Background

The 1996 Broadcasting Act requires digital terrestrial broadcasters to audio describe 10% of their programme output by the tenth anniversary of the start of the service. The ITC can set interim targets starting with 2% in November 1999. Due to technical delays this was postponed until May 2000.

Audio description is a process that uses specially prepared scripts to explain on-screen action, describe locations, characters, body language and facial expressions for the benefit of visually impaired viewers.

Without encroaching upon programme dialogue or sound effects, TV audio description is a means of enhancing the enjoyment and understanding of the 1.7 million people in the UK with serious sight problems who watch television. It enables them to watch their favourite programmes without missing out on important plot twists or directors' tricks.

Between April 1992 and December 1995, the European Audetel Consortium undertook an investigation of the technical, artistic, logistic and economic issues associated with audio description. This included a 4-month long experiment transmitting AD programmes on ITV and BBC.

APPENDIX B - SECTORAL REPORTS AND RECOMMENDATIONS

ADePT (Audio Description Preparation Technology) offers a new technology where describers use a server to store video, script and voice. Only at the final stage of the operation is the voice transferred on to DAT, or it can be laid back directly on to the Digibeta masters. Alternatively, .wav files can be zipped and sent to clients.

Audio describers came from a variety of backgrounds: broadcasters, writers, teachers and some seeking a change of career. Most came from an advert placed in the press, others by word of mouth and some recommended by the RNIB.

Gaps and Shortages

There is currently no formal training process in existence for Audio Describers and the standard of Audio Description can vary substantially from channel to channel. With so few people (approximately 40) able to receive the service, it becomes difficult to establish and evaluate a common standard. Until the issue of funding the Audio Description module is resolved, access will remain restricted and skills needs for description are not a priority.

The Scottish Games Cluster

Dundee is today at the forefront of one of the world's most vibrant new industries: games. At the heart of the city's Creative Industries Campus is the University of Abertay - the first UK University to set up a BSc and Msc in Computer Games Technology and host to the International Centre for Computer Games and Virtual Entertainment. Scotland, alongside London, has the largest number of games development employees in the UK. Scottish companies, universities, further education colleges, enterprise companies and other partners, such as the Scottish Games Alliance, are collaborating to fuel the success of the Scottish games cluster.

10. COMPUTER GAMES

Introduction

The computer games sector is young and commercially successful. There are approximately 250 development studios employing an estimated 20,000 staff (6000 in software development), with a turnover of over £300 million per annum.

The studios are relatively small and often take the development risk. The current trend is for many of the leading UK development companies to have been bought out by international publishers.

The computer games sector was not covered by Skillset's annual census in 2000.

Work by Human Capital⁹⁶ indicates that the largest studios employ approximately 100 people - a medium-sized studio would employ approximately 30. The employment profile indicates an extremely young, well-educated workforce, where permanent employment, as opposed to freelancing, is the norm.

Studios are located across the UK, but London, the south-east and Scotland account for 49% of the workforce.

Software development is the 'core' occupation, employing 6000 people. Other occupations include:

- publishing (2500)
- retail (8000)
- distribution/packaging (2000)
- marketing (2000).

Pre-entry/New Entrants' Training

A small number of specialist courses have been developed to 'train' computer games developers. Human Capital identified seven courses, with a further 15 having modules relating to the sector. 3D model-making courses and pure academic courses such as maths and design are also relevant, and provide a source of skills for the sector. There is little information about post-entry training, but anecdotal evidence suggests that these new companies provide on-the-job training in an unstructured way. They share with digital media an approach that emphasises individual/personal development.

Continuing Professional Development - In-Service Training

The newness of the sector and the technology means that there are currently few formal arrangements for CPD. Models of collaboration between universities and local businesses are emerging. These provide support for businesses and provide on-going training or development services for the sector in the form of 'business clusters'. This innovative approach could provide a model for other sectors.

⁹⁶ Computer Games and HE. (DTI 2001).

Skills Gaps and Shortages

The sector needs to continue to recruit high-quality graduates, many of whom will emerge from the specialist courses, but they will also come from maths, design and computer technology degree courses.

The key skills gaps currently are in business management and marketing. It is vital that the new companies consolidate and develop, for which they need better project management and business management skills.

Key Issues

The Human Capital research indicates a key role for HE institutions in providing 'prepared' new entrants, a research base and an on-going business development service.

Sector Forum

The sector has now formed a new trade association - TIGA (The Independent Games Developers Association). TIGA currently has 36 members and has identified training and development needs as a priority.

Recommendations

TIGA, with Skillset's support, should:

- undertake research to establish the employment profile, identify skills gaps and shortages and, if possible, forecast potential growth and skill needs within the sector;
- facilitate clear relationships between the companies/sector and FE/HE providers, exploring the possibilities of industry accreditation and structured links for work placements;
- work with the e-skills NTO to identify common issues and solutions.

Employers should:

- input into Skillset's careers initiatives, in particular **skillsformedia**.

Government should:

- Provide direct business support for these new companies, including business-related training, and assistance with international development and trading issues.

11. BUSINESS TO BUSINESS

Introduction

Business-to-business communication is currently estimated to have a turnover of around £2.5 billion. It has been one of the fastest-growing industry sectors, with companies specialising in effective communication using a range of media including, increasingly, interactive media. Most companies producing corporate communications have an average turnover of around £2 million and employ fewer than 25 staff.

The IVCA is the largest trade association of its kind in Europe, affiliated to over 15,000 members worldwide. Skillset's first Census estimated a total of nearly 4000 people working on business-to-business production, although many workers in this sector are also active in digital content production and television production. IVCA stages a range of events, including an Award for Enterprise to celebrate best practice in training initiatives, to promote the sector's objectives.

Current Provision

Recent research conducted by the IVCA, in the IVCA People's Skills Scoreboard 2000, found that most staff in production companies held administrative roles. The nature of work in the sector means that there is almost total reliance on freelancers for production, technical and creative roles.

Although there are a number of corporate communication courses in HE, the sector has not as yet formed close links with colleges and universities. Again, this is partly because many production workers in the sector may have trained in media practice or interactive media courses.

Training in the sector is not highly developed. The IVCA People's Skills Scoreboard, now in its second year, is attempting to provide an index of existing training provision and to understand the link between training provision and company performance. In order to deliver content successfully, many established companies believe they now have to reposition themselves and retrain their staff for an entirely new business and creative environment. As IVCA's Project Coordinator notes:

'Nobody thought things could move so fast, and as a result there are not enough people with the right skills to help us all go forward. That must be addressed, and addressed as a first priority.'

Some companies have tried not to rely on 'the usual band of freelancers', but they are the exception.

A common thread that runs through reports of activity in this sector is the use of self-tuition programmes, particularly e-learning, sometimes as a spin-off of

APPENDIX B - SECTORAL REPORTS AND RECOMMENDATIONS

work done for corporate clients. Formal mentoring schemes and peer monitoring are also being used.

Although IVCA encourages its members to pay a training levy with their subscriptions, few do.

Skills Gaps and Shortages

As yet, detailed knowledge of the sector is lacking, but it is likely that the skills needed are similar to those identified in the television production and digital content production sectors.

In particular, the overall shortage of workers with key ICT skills has already been noted. Companies have also identified a lack of entrepreneurialism and general management skills. In a sector that is vulnerable to the economic cycle, a lack of business skills is especially damaging.

In general, the shortage of good interactive media courses in post-16 education is an issue. Many such courses do not place enough emphasis on the skills that are in demand in the workplace.

A general point that the IVCA has noted is that the sector, which has traditionally piggy-backed on training schemes in television production, may need to plan collectively for its own training needs in future.

Recommendations

IVCA, with Skillset's support, should:

- complete its mapping work of the business-to-business sector;
- obtain the necessary resources to develop and implement a sectoral skills strategy, including establishing a full-time training officer at IVCA;
- undertake further research to identify the most effective ways of linking with FE/HE courses.

Business-to-business companies should:

- identify and spread current good practice, such as peer monitoring and mentoring, to the sector as a whole;
- support industry-wide training, including support for the NTO;
- ensure current careers information is accessible via **skillsformedia** and other sector-based information services.



APPENDIX C - GLOSSARY OF TERMS USED

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APPENDIX C - GLOSSARY OF TERMS USED

Adapt - Human Resource Community Initiative funded through the European Social Fund (ESF)

ADSL - Asymmetric Digital Subscriber Line

AGCAS - Association of Graduate Careers Advisory Services

AMPE - Association of Media Practice Educators

Analogue - Analogue transmission is achieved by adding signals of varying frequency or amplitude to carrier signals of a given frequency.

APA - Advertising Producers Association

ASPEC - Association of Studio and Production Equipment Companies

BAFTA - British Academy of Film and Television Arts

Bandwidth - The capacity of the transmission medium in the communications network. Bandwidth is directly proportional to the amount of data transmitted or received per unit time.

BATS - British Animation Training Scheme

BECTU - Broadcasting, Entertainment, Cinematograph and Theatre Union

BJTC - Broadcast Journalism Training Council

BKSTS - British Kinematograph Sound and Television Society

BSAC - British Screen Advisory Council

BSL/English - British Sign Language/English

BTDA - British Television Distributors Association

CCET's - Community Consortia for Education and Training (Wales)

CCG - Comataigh Croaladh Gaidhlig - Gaelic Broadcast Committee

CDN - Cultural Diversity Network

CPD programmes - Continuous Professional Development

CRCA - Commercial Radio Companies Association

Creative Industries Task Force - set up by Government to measure the economic contribution of the creative industries to the UK and to identify the opportunities and threats they faced. The Taskforce has produced two reports, November 1998 and March 2001.

Cyfle - The Welsh Media Training Organisation (Cyfle is Welsh for Opportunity)

DCAL - Department of Culture, Arts and Leisure (Northern Ireland)

DCMS - Department for Culture, Media and Sport

DE - Department of Education (Northern Ireland)

DETI - Department of Enterprise, Trade and Investment (Northern Ireland)

DEL - Department for Employment and Learning (Northern Ireland)

DFES - Department for Education and Skills

DREAM - Digital Regeneration of Enterprises in Animation and Multimedia

DTI - Department of Trade and Industry

EdExcel - A leading UK and worldwide examining and awarding body

ELWa - Education and Learning Wales

EMTA - the National Training Organisation for Engineering Manufacture.

ESF - European Social Fund

Equity - Actor's Union

Facilities - equipment hire or sales companies and studios

FE - Further Education

FEU - Federation of Entertainment Unions

Film Policy Review - Joint Government/ industry initiative set up in 1997 to offer a comprehensive review of the UK film industry. Recommended a series of proposals intended to create a more robust and competitive industry - to benefit British audiences and the UK economy.

APPENDIX C - GLOSSARY OF TERMS USED

Foundation degrees - courses underpinned by academic learning which focus on the acquisition of generic and technical skills gained partly from learning in the workplace and completed in two years or an equivalent period part-time.

FTF - Freelance Training Fund

FT2 - Freelance Film and Television Training

Future Skills Scotland - Scottish Skills Observatory and Labour Market Intelligence Unit

Future Skills Wales - Welsh Skills Observatory and Labour Market Intelligence Unit

Gaelic Broadcast Committee - CCG - Comataigh Croaladh Gaidhlig

GLA - Greater London Authority

GNVQs - General National Vocational Qualifications

Graduate Apprenticeships - Frameworks which integrate study at degree or diploma level with structured work based learning

Grips - assist the camera crew with the use of specialised equipment designed for moving and elevating the camera during the shot.

GTT - Gaelic Training Trust

GWR - Great Western Radio

HE - Higher Education

HEIs - Higher Education Institutions

HEROBIC - Higher Education Reach-out to Business and Community Fund

HESA - Higher Education Statistics Agency

HIE - Highlands and Islands Enterprise - Economic Development

Agency for 10 Scottish LECs

ICRTS - Independent Companies Researchers Training Scheme

ICT - Information Communication Technologies

IER - Institute of Employment Research

IIP - Investors in People

ILAs - Individual Learning Accounts

Intellectual property - Any intangible asset that consists of human knowledge and ideas

IPTF - Independent Production Training Fund

IPTS - Institute of Prospective Technological Studies

ITBs - Industrial Training Boards

ITC - Independent Television Commission

ITCE - Information Technology, Communications and Engineering

IVCA - International Visual Communication Association

Labour Force Survey - Quarterly employee sample survey conducted by the Office for National Statistics (ONS)

Learn Direct - a service set up by UFI to bring learning and skills into people's lives through online learning and information about courses.

LECs - Local Enterprise Companies (Scotland)

LEDU - Local Economic Development Unit (Northern Ireland)

Lifelong Learning - the commitment to maintain and update skills throughout ones working life

LLSC - Local Learning and Skills Council

LSC - Learning and Skills Council

MAs - Modern Apprenticeships

MEDIATE - Grouping of media related National Training Organisations

MU - Musicians Union

Multi-tasking - being able to perform a number of creative or technical skills across a number of platforms.

APPENDIX C - GLOSSARY OF TERMS USED

NACCCE - National Advisory Committee on Creative and Cultural Education

NFTS - National Film and Television School

NIIMA- Northern Ireland Interactive Multimedia Association

NSTF - National Skills Task Force

NVQs - National Vocational Qualifications

OECD - Organisation for Economic Co-operation and Development

OFCOM - Office of Communications

PACT - Producers Alliance for Cinema and Television

People's Skills Scoreboard - Developed by DTI/DFEE for NTOs to create and monitor industry-wide training indicators

QCA - Qualifications and Curriculum Authority

Qualifications Mapping Project - Database and classification of all qualifications that relate to the culture and media sectors

RCTI - Research Centre for Television and Interactivity

RDAs - Regional Development Agencies

RIFE - Regional Investment Fund for England

RTS - Royal Television Society

RVQ - Related Vocational Qualification

S4C - Sianel Pedwar Cymru - Wales' Fourth Channel

Sabhal Mor Ostaig - College on Skye, delivering courses through the medium of Gaelic

SBS - Small Business Service

Scottish Enterprise - Economic Development Agency for the 12 LEC regions of Scotland

Scottish Executive - the executive of the Scottish Parliament

SEEDA - South East Economic Development Agency

Sgrin - Welsh Media Agency

STC - Sector Training Council (Northern Ireland)

SIF - Skills Investment Fund

SIC - Standard Industry Classification

Skills Foresight - Analysis of future skills requirements

skillsformedia - careers and training advice and guidance service operated by Skillset and BECTU

Skills Passport - Record of training and or achievement.

Skills Wales Fund - a training fund for individuals working in the media industry in Wales. An applicant's training need is identified and then matched with all possible training solutions including short courses, secondments or mentoring. The fund is supported by Skillset, the National Assembly for Wales and the European Social Fund.

SMEs - Small to Medium Sized Enterprises

SOC - Standard Occupational Classification

SQA - Scottish Qualifications Authority

Sufl - Scottish University for Industry

SULF - Scottish Union Learning Fund

TAC - Teledwyr Annibynnol Cymru - Welsh Independent Producers Association

TCS - Teaching Company Scheme

Technical Certificates - a taught off the job qualification delivering the underpinning knowledge and understanding of an NVQ

T&EA - Training and Employment Agency (Northern Ireland)

TNA - Training Needs Analysis

APPENDIX C - GLOSSARY OF TERMS USED

Ufi - University for Industry - Working as a public-private partnership in England, Wales and Northern Ireland, Ufi aims to put individuals in a better position to get jobs, improve their career prospects and boost business competitiveness. Ufi's services are being delivered through learndirect.

ULF - Union Learning Fund - Government funding for trades union managed lifelong learning initiatives

UTV - Ulster Television

VET - Vocational Education and Training

VFG - film, broadcast and lighting equipment rental company

VQs - Vocational Qualifications

VTR - Video Tape Recorder

WA - Welsh Assembly

WSTF - Welsh Skills Task Force

YMTC - Yorkshire Media Training Consortium



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APPENDIX D - CONTRIBUTORS



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We are deeply indebted to all those individuals and organisations who gave willingly of their time and experience to contribute to the group's work.

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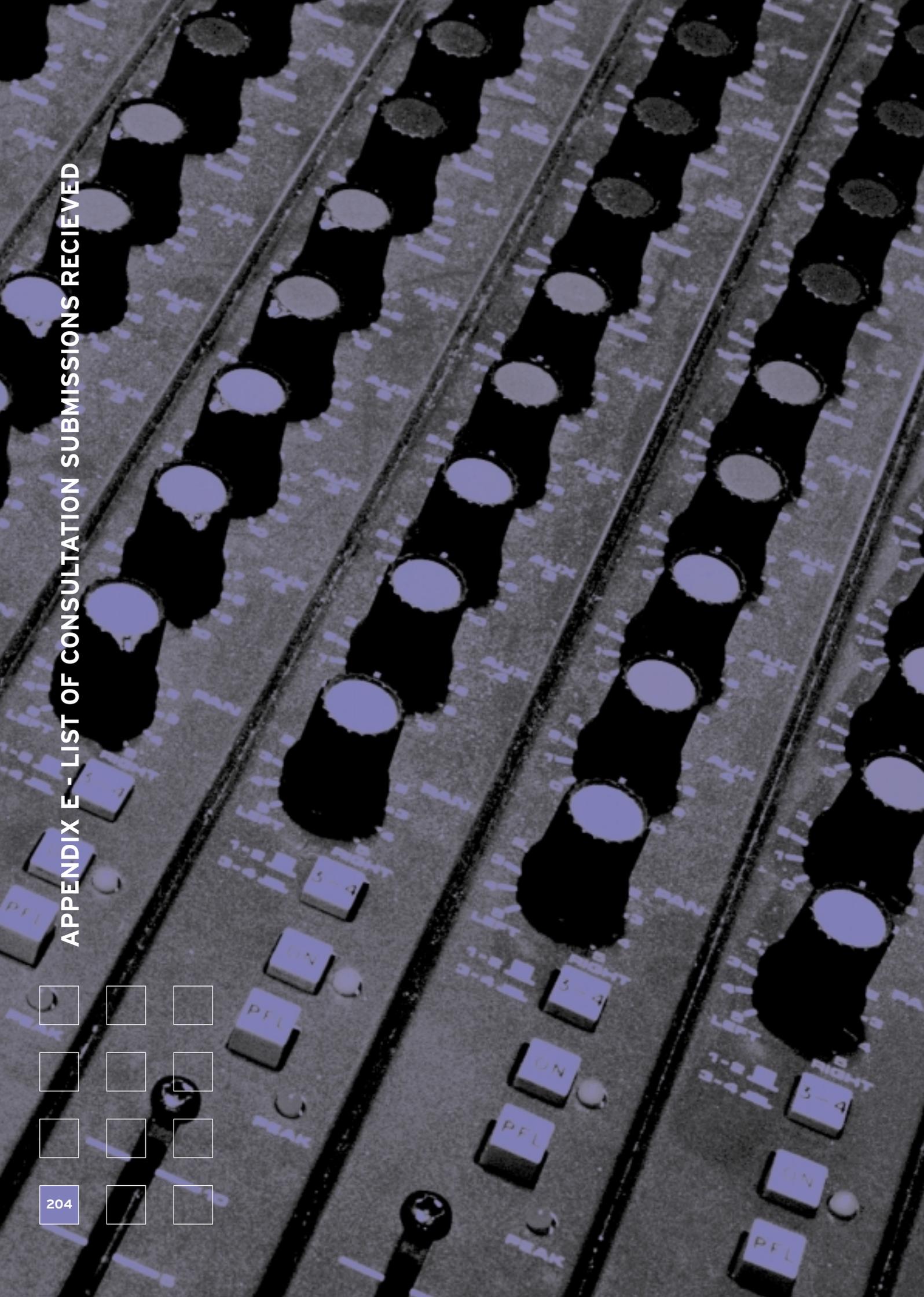
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APPENDIX E - LIST OF CONSULTATION SUBMISSIONS RECEIVED

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Companies

Aardman Animations
BBC News
BBC Training & Development
BSkyB
Carlton
Channel 4
Channel 5
EMAP Radio
FLR 107.3
Framestore
Granada Media
GWR
Meridian Broadcasting
MTV Networks
Radio Tay LTD
S4C
Siriol
Teddington Studios
Teleimagination
The Learning Factory
TSMS
United Broadcasting and Entertainment

Trade and Professional Bodies

Association of Media Practice Educators - AMPE
British Television Distributors Association - BTDA
Broadcast Journalism Training Council - BJTC
Cinema Exhibitors Association - CEA
Guild of Television Cameramen
Independent Games Developers Association - TIGA
Independent Producers Training Fund - IPTF
Media Communications and Cultural Studies Association - MECCSA
Producers Alliance for Cinema and Television - PACT
Royal Television Society - RTS
Teledwyr Annibynol Cymru/Welsh Independent Producers - TAC
Women in Film and Television

Trade Unions

BECTU
Equity
NUJ

National and Regional Training Consortia

Cyfle
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Northern Ireland Film Commission

APPENDIX E - LIST OF CONSULTATION SUBMISSIONS RECEIVED

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Yorkshire Media Training Consortium

Agencies

Scottish Enterprise
SEEDA - South East Economic Development Agency
Welsh Development Agency

Education Institutions

Bexley College
Bournemouth Media School
Liverpool John Moores University
London College of Printing School of Media
MEDIaworks, University of West of England
National Film and Television School
Newham Sixth Form College
North Wales School of Art and Design
Northern Film School, Leeds Metropolitan University
South East Essex College
University of Loughborough School of Art and Design
University of Westminster
West Herts College

Training Organisations

ARTTS International
Earshot
FT2
Hulme Adult Education Centre
Television Arts Performance Showcase - TAPS
The Forum for Technology and Training
Vera Media
West Herts Media Training Centre
Youth Culture Television - YCTV

Other

Deaf Broadcasting Council
Independent Television Commission - ITC

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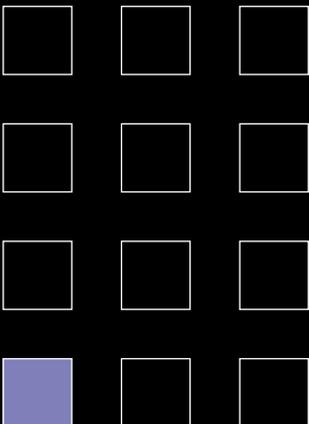
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