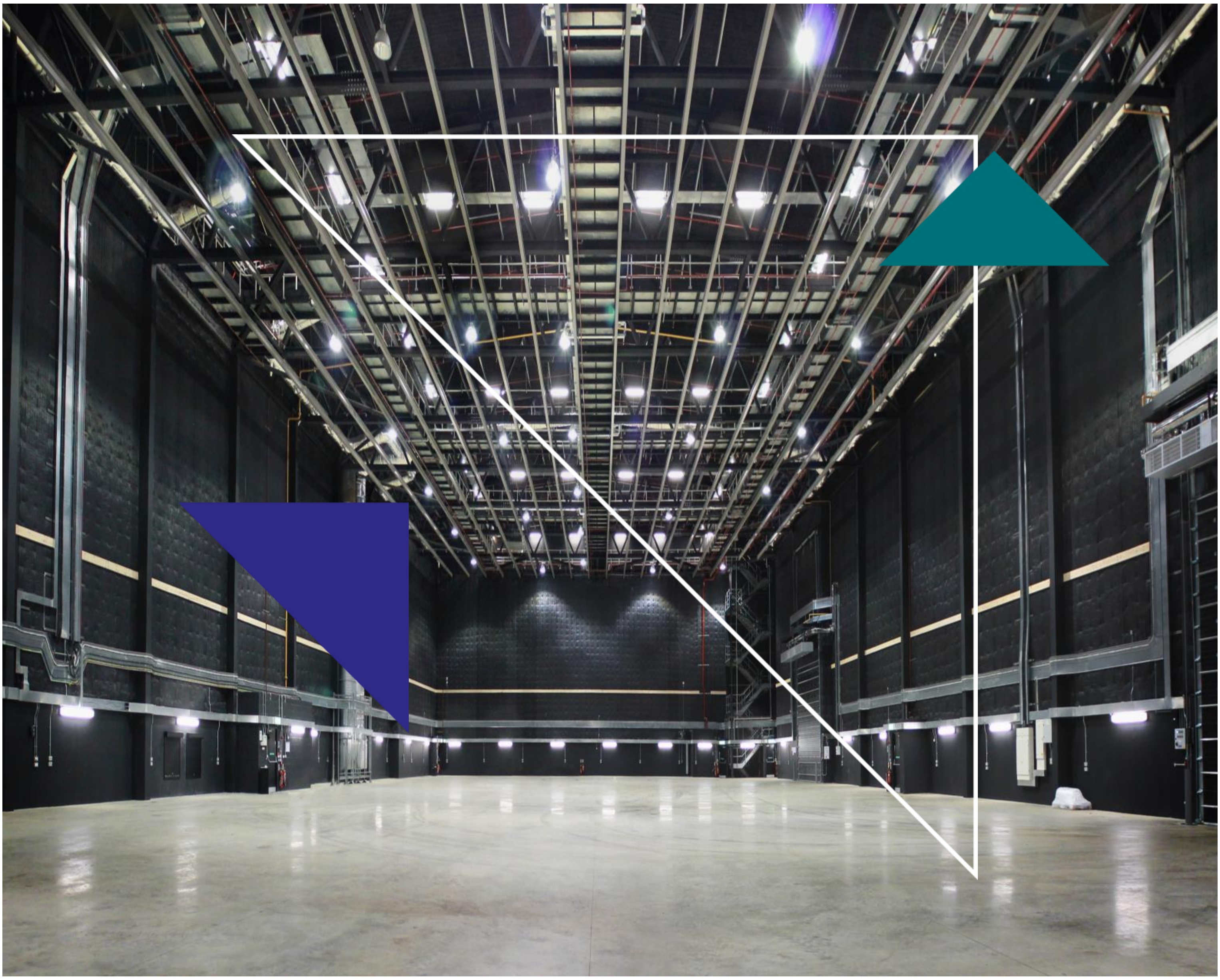
Version 1.0

Film and TV Production Sector Action Plan

SEPTEMBER 2022



Contents

Preface	i
Film and TV Production in Hertfordshire	1
Our Vision	5
Priorities for the Sector	7
Delivering our Action Plan	10
Resourcing our Action Plan	12
Annex A: Detailed Action Plan	13

Preface

This is one of a suite of Strategies and Action Plans which is being developed by Hertfordshire LEP, working alongside Hertfordshire Growth Board. It is designed to help reinvigorate the economy of Hertfordshire following both the pandemic and the UK's departure from the EU. It is founded on principles of 'good' economic growth which is both socially inclusive and environmentally sustainable.

What we have learned

Over the last decade – and guided firmly by our Board – Hertfordshire LEP has developed a strong, coherent and consistent strategic narrative for Hertfordshire. Previously, Hertfordshire was perceived as an apparently prosperous and 'leafy English shire county'. There was, with hindsight, a hint of complacency and some detachment from the realities of economic, social, technological and environmental change.

Through successive strategic statements – including an early Growth Strategy (in 2011/12), a Strategic Economic Plan (in 2014, and then updated in 2017); and a draft Local Industrial Strategy (2019) – Hertfordshire LEP has sought to change the discourse. It has highlighted the real opportunities available to businesses and communities across Hertfordshire, but also both the risks and the responsibilities that come with them. At the same time, it has 'shone a light' on what isn't working within Hertfordshire. It has highlighted some continuing tensions and contradictions that really do need to be addressed.

Looking forward

As we – like the rest of the UK – come to terms with the implications of the pandemic and the realities of life outside the EU, the LEP is developing a suite of strategic statements that will guide it through to the 2030s. These capture the learning of the last decade. They also anticipate a future that is likely to be guided by stronger imperatives linked to economic well-being in a rounded sense. Over the next decade, technological change will continue apace but environmental considerations will be prominent, as will commitments to inclusivity. To be clear, economic growth will still be essential, but it will find new expressions in a global political economy characterised by new alliances, expectations and possibilities.

For Hertfordshire LEP, this will mean closer working relationships with partners, particularly with Hertfordshire Growth Board – whilst still recognising the crucial importance of a business-led partnership in defining, debating and delivering an agenda for economic growth. It will also mean closer working relationships with neighbouring areas, recognising that businesses have scant regard for administrative boundaries, and much will be gained from working across functional economic areas (in terms, for example, of supporting key clusters).

Our Strategies and Action Plans

The suite of strategic statements will be a live resource and it will evolve over time. It will include:

- foundational strategies which will focus on the breadth of enterprise and innovation across 60,000 businesses, and the criticality of employment and skills across almost 1.2 million people.
- action plans which accelerate the growth of key clusters and sectors: these are distinctive in their character and offer particular opportunities for high value and 'additional' growth which will equip Hertfordshire to compete internationally as well as nationally.
- strategies for responsible growth in Hertfordshire including in relation to clean growth, inclusive growth, and growth which embraces the possibilities of digital technology in an informed and responsible manner.

All of these strategies will be developed in partnership. In delivery, some will be led by the LEP. Others will primarily be the responsibility of other partners, notably Hertfordshire Growth Board. In all cases, they are crucial to the future of Hertfordshire's economy and the LEP will help to drive them forward.

This document

This document presents our Action Plan for the Film and TV Production Sector. This is amongst the most dynamic parts of Hertfordshire's economy. It has seen significant investment in Studio space over recent years, and more is planned and proposed. It presents a substantial opportunity currently, and it is one that we intend to harness to the full. Our Action Plan explains how we will do this.

This Action Plan is a living document and will be regularly updated.

Film and TV Production in Hertfordshire

Film and TV Production has a long history in Hertfordshire – through Elstree Studios, BBC Elstree and Leavesden Studios. The UK is seeing huge levels of interest in new Studio (and stage) space and Hertfordshire is a major focus. This presents a real opportunity to build on our heritage and reinforce our position at the core of Film and TV Production in the UK.

Global growth and significant investment in the UK...

Fuelled by changing viewing habits and technological changes, there has been substantial recent growth in Film and TV Production globally. Most commentators expect this growth to continue.

With a long history of Film and TV Production and an internationally favourable tax regime, the UK is capturing a significant share of this growth: the major streamers – such as Apple, Amazon and Netflix – are investing substantially to secure additional production capacity in the UK. US Film Studios are also recognising the benefits of producing in the UK, leading to increased inward investment.

...and a major footprint in Hertfordshire[1]

Driven in large part by access to Heathrow Airport and central London, the hub of UK Film and TV Production is defined around a 'wedge' that extends from central London (Soho) out through west London across an arc that (loosely) follows the M25 – approximately from the M3 in the west to the A1(M) in the east. Hertfordshire is fully part of this broader footprint.

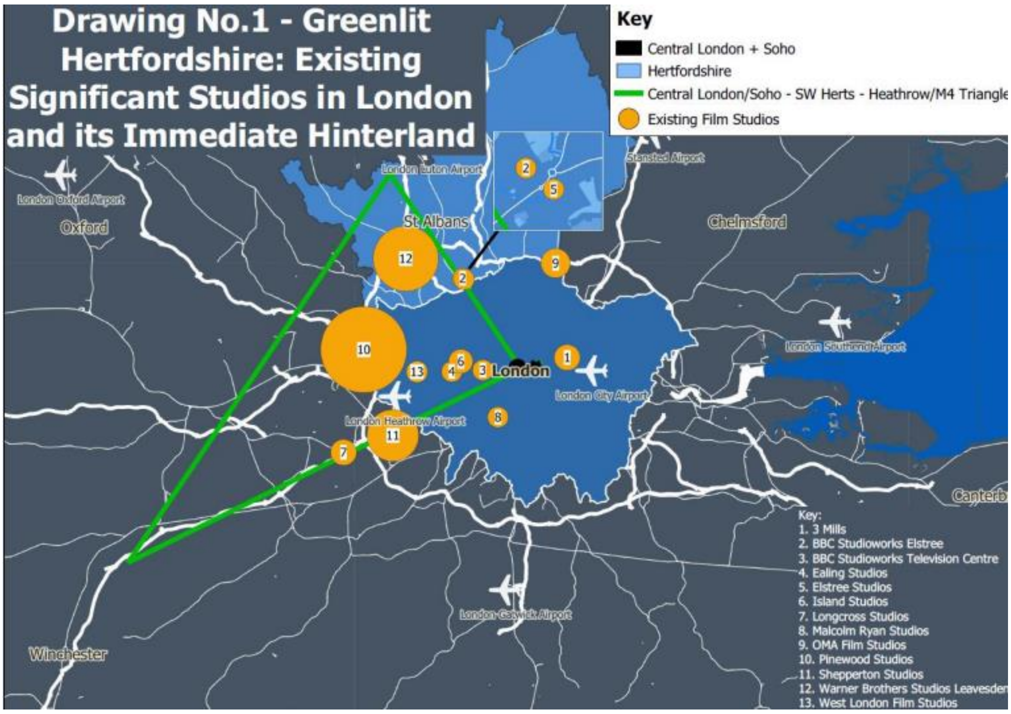
The history of Film and TV in Hertfordshire can be traced back well over a century. Over this time, its fortunes have ebbed and flowed.

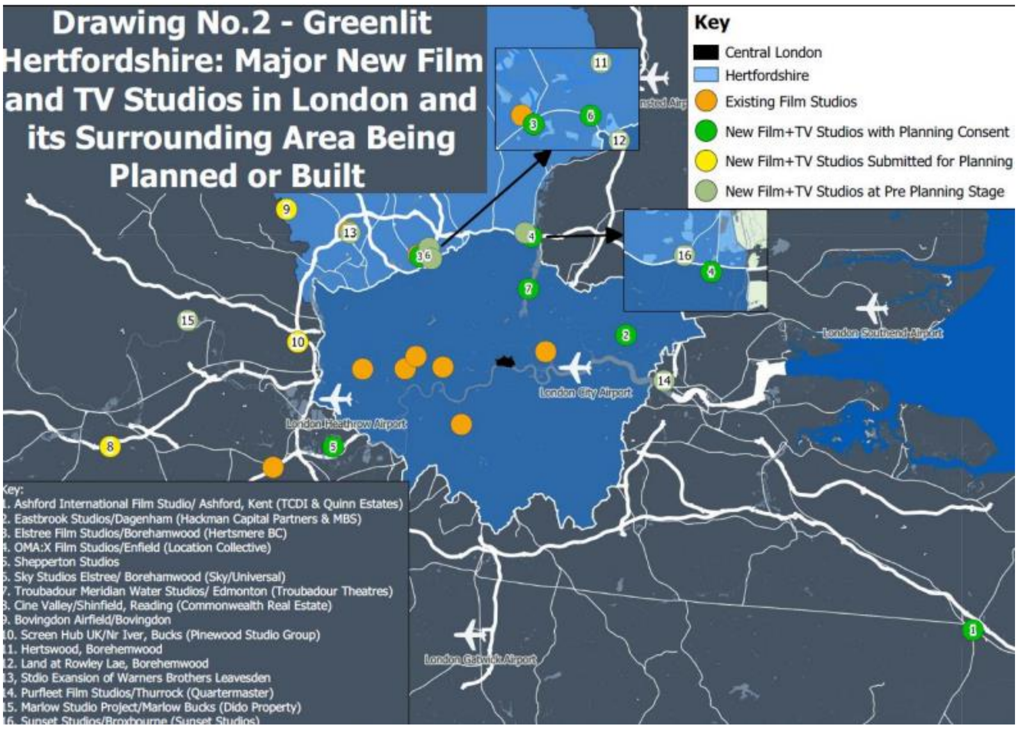
Of the current Studios in Hertfordshire, **BBC Elstree** and **Elstree Studios** are the oldest. Elstree Studios thrived through to the 1970s (with, for example, early Star Wars films), but then largely fell into disuse. In the 1990s, it would have closed without the intervention of Hertsmere Borough Council. Now it is seeing investment and planned expansion.

Leavesden Studios (to the north west of Watford in Three Rivers) came into being in the late 1990s with the re-use of a redundant site which had been vacated by Rolls Royce. In 2010, the site was acquired by WBSL, a subsidiary of Warner Bros. Entertainment. Since then, the size and ambition of the facility has increased considerably following an early £150m investment programme. Further investment has followed and more expansion is proposed.

[1]For a full version of the evidence base underpinning this Action Plan, see 'Film and TV Production Sector in Hertfordshire: Evolution and Prospects'. Report by SQW to Hertfordshire LEP (forthcoming).

Figure 1: Existing Studio space and planned/proposed provision of Studio space across Hertfordshire and the wider area around London[2]





[2] Taken from 'Greenlit Hertfordshire: Working towards further Film and TV development opportunities for the county'. Report by Markides/Civix to Hertfordshire LEP, September 2021

There are currently a total of 13 major Film Studios in London and its immediate hinterland, providing a total of 1,629,000 sq. ft. of Studio space and 110 sound stages, 54 of which are larger than 10,000 sq. ft.

All but two are either in south west Herts or west of London, forming part of a 'Central London and Soho/south west Herts/ west London and M4 corridor triangle' that has characterised major Film Studio locations since the early days of Film.

A total of 16 new Studio developments in greater London are currently being planned or built, totalling some 3.8m sq. ft. of space. Seven of the 16 are in Hertfordshire, and one involves the largest single new proposal in the UK (the 608,000 sq. ft. Hertswood Studios in Borehamwood).

If all proposals are delivered, and combined with the Studios already operating, this would take total provision of Film and TV Studios in London and surrounding areas, predominantly Hertfordshire, to just under 5.5m sq. ft. across close to 300 sound stages.

Scale of the sector - currently and in the future

From official data sources, it is estimated that the Film and TV sector currently accounts for over 4,000 jobs in Hertfordshire (which are concentrated in the south west of the county). However this represents a substantial underestimate because of the high incidence of freelancers, many of whom are 'invisible' through official data sources. Applying ratios from national surveys suggests that the actual number of jobs could be up to 7,200 in Hertfordshire. In addition, there are jobs in the wider supply chain.

Looking ahead – and based on estimates of the current and planned or proposed investment in Studio space – Film and TV employment in Hertfordshire could rise (under different scenarios) to between 9,200 and 19,100 jobs. This suggests a doubling of employment in the sector in Hertfordshire over a small number of years.

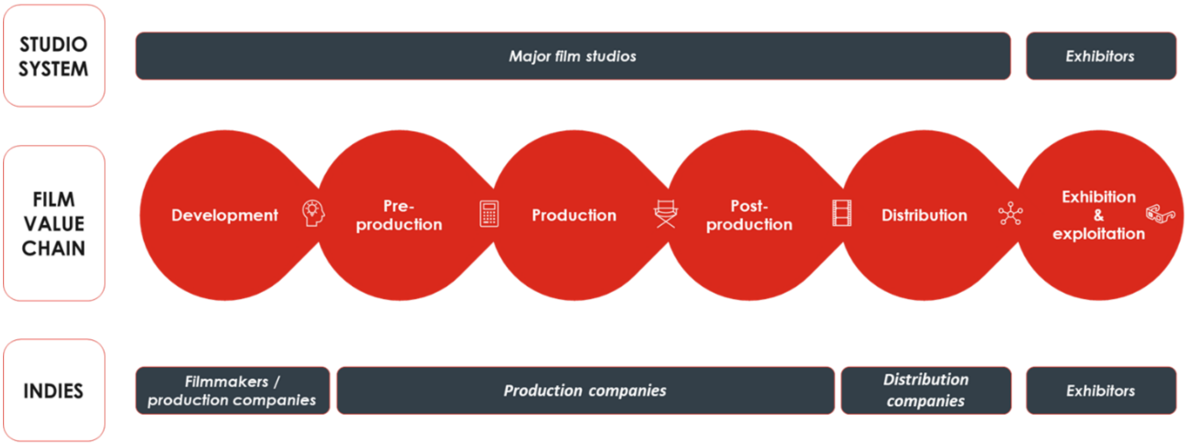
How Films and TV shows are made….

The 'value chain' linked to Film and TV Production however is complicated – and it is also changing. Major Studios and production companies define its core. Alongside the 'Big Five' majors – Universal, Paramount, Warner Bros., Sony and Disney – are independent production companies whose recent growth has been fuelled by a fragmentation of viewing habits precipitated primarily by the possibilities of streaming.

But despite the size of the corporates, the sophistication of the technologies and the fact of disruption through the streamers, the larger part of the Film and TV Production process has changed little over decades. Crews come together for each production, based largely on existing relationships and 'word of mouth' and then they disperse, 'like circus travellers', as one contributor to this Action Plan put it.

The 'system' is organised but fragmented. It is managed and yet highly fluid. At the heart of it, the role of freelancers has been – and remains – critical. In seeking to grow the sector, this very distinctive structure presents a particular set of challenges. This Action Plan needs to define a response.

Figure 2: Understanding the value chain



Source: SQW

Our Vision

We believe that our Film and TV Production Sector is at the vanguard in the context of accelerated national and global investment. We have an opportunity, now, to make that count. If we succeed, we will deliver benefits to residents, communities and businesses in Hertfordshire. We will also achieve wider societal outcomes across the UK and beyond.

Our Vision for Film and TV Production in Hertfordshire

In the context of substantial planned/proposed investment in Studio (and stage) space, over the next three to five years, Hertfordshire will see the accelerated development of what is already a world class Film and TV Production 'ecosystem'.

This will result in:

- advancing what are already some of the best Film and TV Productions in the world
- improved economic outcomes in Hertfordshire (and the UK)
- an enhanced quality of life

As a result, by 2027, Hertfordshire will be home to a Film and TV Production 'ecosystem' which is operating at even greater scale. It will be recognised around the world for its excellence and creativity.

It will be characterised by:

- a vibrant set of Studios and a constant flow of high quality productions
- a strong pipeline of talent across all key roles and functions
- innovative small businesses that help to boost productivity and act as a catalyst to accelerate growth across the Film and TV Production supply chain
- exemplary environmental performance with the extensive re-use of materials and Net Zero outcomes
- a supply of commercial property, and effective levers through the development process

Across both the Film and TV Production Sector, it is critical that we deliver six key outcomes. Led by the private sector, achieving these will need to be a shared commitment across partners in Hertfordshire – the LEP, the Growth Board, Hertfordshire County Council and the district/borough councils.

Figure 3: Key Outcomes for this Action Plan

1: A reliable **supply of talent** consistent with the scale of studios which are either planned or proposed and the productions that will use them

2: Novel **business models** across the wider ecosystem consistent with productivity gains

3: **Net Zero** outcomes in Film and TV Production

4: **Commercial property solutions** for Film and TV Production (including the wider supply chain)

5: Outstanding **digital infrastructures** for Film and TV Production

6: Hertfordshire as a **location** for Film and TV Production which is recognised around the world, promoted effectively and valued fully

.

Priorities for the Sector

In relation to Film and TV Production, the opportunities for growth are substantial, driven by burgeoning investment globally. In order to achieve the outcomes set out in the previous section, there is a series of priorities that we need to address locally. Many of these are on the 'supply side'. They represent risks to the sector; addressing them will be imperative.

The scale of the growth opportunity surrounding Film and TV Production presents both challenges and opportunities.

Notwithstanding the investment in Studio space, it is important to recognise that employment (and associated output) growth is not inevitable. Despite the advantages of the UK tax regime, the sector as a whole is potentially mobile and arguably there is a small 'window' in which the investment of recent years will need to 'come good' and generate appropriate returns.

In this context, evidence gathered whilst preparing this Action Plan (mainly through consultations with the Studios and across the wider ecosystem) has pointed to supply side issues which need to be addressed with some urgency. These are defined in relation to Hertfordshire, although most apply across the broader geography which extends around the M25 'arc' (from the M3 to the A1(M).

Workforce availability and skills

There is substantial evidence of skills and labour shortages even before new Studio space substantially comes on-stream. The evidence suggests that the freelance model is under pressure and yet there are systemic failures in investing in skills and building capacity.

The freelance model means that 'organised training' – through for example structured apprenticeships – is very difficult and the pressure in the system means that interns/trainees are hard to accommodate. Everywhere there is a call for 'experienced' people who understand the pressures and possibilities of Film and TV Production, but breaking into a sector that relies crucially on trust, relationships and networks is extremely challenging. The pipeline of talent is falling behind the growth in demand. The consequence is capacity issues with an ageing and overstretched workforce as freelancers are increasingly operating at full pace continuously – a situation which has 'ramped up' over the last two to three years (pandemic notwithstanding). To quote one consultee:

'The market is so busy, people are constantly in work. The industry is very intense – it takes its toll, and people can easily burn out. Ideally, people would take a break between shows and it used to be like that, but recently (particularly over the last three years), this has changed – there is a lot of turnover on every single show, with people 'jumping ship' before the show is even finished and moving on to a new opportunity.'

There is an urgent need to respond to this – and the issues are recognised universally across the Film and TV Production sector.

Business models

The sector as a whole is full of contradictions.

On the one hand it is technologically sophisticated and is changing quickly (particularly with the arrival of the streamers), but on the other, it hugely conservative and committed to a business model that is not easily 'scaleable'. There is some evidence of vertical integration, particularly as the costs of employing people on a freelance basis start to escalate, but this is only at the margins and the 'essence' of the creative process is defined around structural flexibility.

There is a need to reflect on the steps that could be taken to engineer some efficiencies and productivity gains whilst recognising that creativity and originality remain the lifeblood.

Environmental performance

The environmental performance of Film and TV Production is increasingly recognised as a source of concern, particularly given national commitments to Net Zero. Again 'the model' has essentially been defined by its ephemerality and the fact that 'every production is different'.

Some steps have been taken to re-use and recycle resources, but this process has much further to go. In this context, it is notable that some of the major Studios have committed to environmental improvements. These need to be encouraged and used as a catalyst for wider changes across the ecosystem.

Sites and premises

There is a major set of issues linked to sites and premises. Studios (and stages) – both those that exist and those that are planned or proposed – have a sizeable footprint and employment land supply is under pressure, particularly in south west Hertfordshire. There is a need to think creatively about how land assets are used. There is on-going pressure for residential uses in Hertfordshire, and the land-take associated with Studios and stages is relatively large – so the economics may be complicated in development terms. Moreover there is a need to negotiate appropriate S106 agreements and recognise the full potential of the sector in local planning policy. There is also a need to 'stretch' the footprint, particularly in relation to functions that do not require immediate co-location with major Studio sites.

Digital infrastructure

Within Hertfordshire, the expansion of Studio and stage space is creating significant demands in terms of the wider digital infrastructure. This is particularly important in relation to post-production. Evidence from consultations across the Film and TV Production sector suggest that the principal providers are struggling to respond.

There is an important link here to the Digital Strategy which is being prepared by Hertfordshire LEP and Hertfordshire Growth Board. The needs of the growing Film and TV sector must be reflected fully within it.

Hertfordshire locations

With the growth of Studio space, different parts of Hertfordshire are increasingly being used as Film and TV locations. This in itself presents a range of opportunities: local authorities can generate income from the use of council-owned land and buildings for filming purposes; the presence of Film and TV crews provides demand for a range of local service providers; and the screening of 'sites in Hertfordshire' ought to raise the profile of the county more generally. Some local authorities have recognised the surrounding potential, but this could be done on a more consistent basis county-wide, building on the work of Visit Herts.

Our Action Plan

The priorities outlined above need to be translated into deliverable actions. These are set out in detail in Annex A. Our actions are SMART (specific, measurable, achievable, realistic and timed) and there must be a commitment to delivering them.

Delivering our Action Plan

What now matters is that our Action Plan is delivered. This will need to be a partnership commitment which is shared by Hertfordshire LEP, Hertfordshire Growth Board and various other partners. Fundamentally, however, it must be owned by – and responsive to – the Film and TV Production Sector.

Industry Panel

We are setting up an Industry Panel which will drive forward this Action Plan.

The Industry Panel will be chaired by one of the LEP's private sector Board members. It will include four to six other industry leaders from different parts of the Film and TV Production Sector. This will include representation from the major Studios, but also from among the wider ecosystem (including some small businesses). Given its international dimension, it will also include senior input from the Department for International Trade.

The Industry Panel will meet around four times a year and it will focus solely on the delivery of this Action Plan. It will receive regular reports of progress and – with an operating model akin to that of a Select Committee – it will 'call in' key delivery partners from time to time.

It will also take a view on whether the actions identified continue to be the right ones and/or whether other actions need to be prioritised.

In short, its key functions will include:

- Scrutiny – holding different parts of the public sector architecture to account.
- Challenge – testing whether the 'right steps' are being taken.
- Leverage – helping to ensure, through the Plan, that private sector resources are fully aligned and supporting overall delivery.
- Learning – making sure that we learn what works and what doesn't, and ensuring that the Action Plan is attuned to the realities of changing market and other drivers.

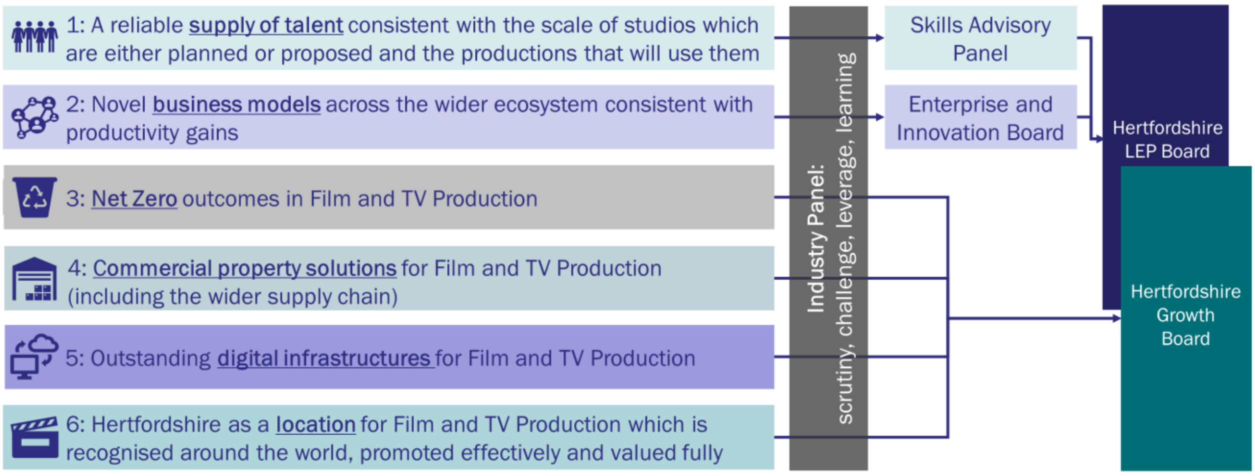
LEP Film and TV Production Sector Lead

Providing a secretariat function to the Industry Panel will be a LEP Creative Sector Lead. This is a new senior post to be filled by someone with significant relevant industry experience. As well as supporting the Panel, the job holder will work across the wider sector – literally 'keeping an ear to the ground' whilst also supporting the delivery of the Action Plan.

Hertfordshire LEP Board and Hertfordshire Growth Board

In seeking to brigade resources to achieve the six key outcomes, both the LEP Board (principally through two Programme Boards) and Hertfordshire Growth Board will have key responsibilities. Two of the key outcomes rest with the LEP Board and four with the Growth Board – but in delivery, all six need to be advanced together and in a synergistic and complementary way.

Figure 4: Advancing the Action Plan: Delivery, governance and accountability



Resourcing our Action Plan

We will need to work together to resource the delivery of our Action Plan.

In delivering this Action Plan, the private sector will play a key role – including with regard to resourcing. Fundamentally, it will be private sector investment and leverage that fuels the growth of the Film and TV Production sector.

Public sector resource will be needed to address some market failures, principally on the supply side. These in turn will unlock a growth process that ought to deliver substantial economic impacts in Hertfordshire and beyond.

In committing to the delivery of our Action Plan, we recognise that we will need to work creatively across a range of resourcing solutions. We expect to create a *de facto* funding pot, drawing on:

- UK Shared Prosperity Fund – particularly elements linked to skills, innovation and business support.
- UKRI Creative Industries Clusters Fund – if there are future rounds.

Locally, we expect Hertfordshire County Deal will contribute to the delivery process. We will also commit to investing LEP Programme budgets, where the business case is a strong one.

In addition, we expect to work with a range of national programmes linked to the Department for Digital, Culture, Media & Sport (DCMS), Arts Council England, Screen Skills, British Film Institute, and others. Hertfordshire's Film and TV Production sector is of national importance and we expect this to be reflected through national funding decisions.

Annex A: Detailed Action Plan

The Film and TV Production Sector needs to grow in response to significant new investment in Studio and stage space. Building on various actions that are already underway, further steps must be taken to ensure that this opportunity is realised both fully and well. In many cases, these interventions are urgent. They are set out in outline below, and organised according to the Action Plan outcome to which they will principally contribute.

Table A1: Priority actions for the Film and TV Production sector

Action	Rationale	Deliverables	Priority (HML)	Lead organisation	Resources	Outcomes & Timescales
Outcome 1: A reliable supply of talent consistent with the scale of studios which are either planned or proposed and the productions that will use them						
1-1: Convene an industry-led Film and TV Production Skills Taskforce and develop a comprehensive plan for the sector.	The issues facing Film and TV Production in relation to the supply of skills are significant and urgent. If they are not addressed, the potential represented by investment in Studio and stage space will not be realised.	Comprehensive skills plan for the Film and TV Production sector.	High	This should have representation from the main national players (e.g. Screen Skills, BFI) as well as the Studios in Hertfordshire and a range of supply chain partners.	LEP	By 2025, major skills gaps in the availability of local production skills are addressed as a result of input from an effective and influential industry and skills provider backed task force.
1-2: Explore the feasibility of establishing a Film and TV Production sector training facility at Leavesden Park.	Leavesden Park is a key location in relation to Film and TV Production and it would be an ideal location for any dedicated training facility.	Initially a feasibility study and then potentially a dedicated training facility at Leavesden Park.	High	Warner Bros which is the owner of Leavesden Park.	Warner Bros, Skills Academy, University and colleges	A production skills hub, offering access to state-of-the-art equipment and technology for the training of Film and TV students.

Action	Rationale	Deliverables	Priority (HML)	Lead organisation	Resources	Outcomes & Timescales
1-3: Put in place a mentoring scheme for those progressing to senior roles in Film and TV Production.	Given the scale of demand, there is a need to encourage rapid progression among those already within the sector from junior to more senior management roles. This will be achieved through an industry-led mentoring scheme.	This will be an ongoing project, but it should increase the number of more senior managers within the Film and TV Production Sector.	Medium	Warner Bros – working with other Studios.		A fully functioning mentoring programme established to facilitate knowledge transfer from the corporate sector to the freelance and SME side of industry.
1-4: Establish an early dialogue with Screen Skills, BFI and other national bodies.	Given the issues facing the sector, it is essential that national workforce development initiatives (e.g. Future Film Skills Programme) are delivered fully in Hertfordshire – and that local needs are understood fully at a national level.	Delivery of national skills and workforce development programmes more fully in Hertfordshire.	High	Hertfordshire LEP to lead the dialogue with support from the Industry Panel as appropriate.	Hertfordshire LEP and industry stakeholders	By end June 2022, LEP convenes platform for industry to help articulate industry's skill requirements to 2030.
1-5: Investigate the possibility of local versions of national interventions targeted specifically at freelancers (e.g. Skills Investment Fund).	The structure of the ecosystem is very challenging in relation to the delivery of skills and training because of the very high incidence of freelancers and the absence therefore of businesses to work with (using 'normal' routes like apprenticeships). There is a need to do something different, building on models	This will deliver new training schemes targeted on freelancers.	High	Hertfordshire LEP working with others – notably Elstree Screen Arts Academy, Creative England, NESTA.	Hertfordshire LEP and industry stakeholders	Market failure in the upskilling of freelancers is addressed through the provision of affordable skills training delivered locally.

Action	Rationale	Deliverables	Priority (HML)	Lead organisation	Resources	Outcomes & Timescales
	that have been developed nationally.					
1-6: Support the development of local initiatives led by the University of Hertfordshire, West Herts College, and Elstree Screen Arts Academy.	Local providers are already in the process of developing responses to the skills challenge but there is a need to build industry awareness and trust. This could involve an industry-led accreditation system to increase employer confidence in FE and HE courses.	This will ensure that the supply side in Hertfordshire is able to respond more fully to the needs of the sector.	High	West Herts College and University of Hertfordshire.	FE & HE providers	Locally tailored and accredited skills programmes are established for local students and provide clear pathways to employment in the industry.
1-7: Develop mentoring arrangements for new entrants to the sector.	Building networks is a critical part of life as a freelancer – and a critical part of the solution to bringing in new entrants. There is scope to linking to Screen Skills Trainee Finder (for Film and high end TV) and work with major Studios and productions in Hertfordshire, to put in place pilot initiatives to mentor new entrants to the sector and to accelerate the development of networks.	This will result in a clearer and smoother pathway for those considering entering the sector.	Medium	TBC		By end of December 2022, we will have established an effective, self-financing network to enable rapid crew building for productions taking place in Hertfordshire. Managed by industry for industry, it will provide brokerage services: it will enable job seekers to find work and production firms to find talent.
1-8: Promote Hertfordshire Opportunities Portal (HOP) to the	This is an infrastructure that already exists, and it could play a key role in attracting young people and matching	This will result in tailored pages on the HOP website and greater input to them	Medium	Hertfordshire LEP		By summer 2020, HOP will provide a clear channel by which firms can attract

Action	Rationale	Deliverables	Priority (HML)	Lead organisation	Resources	Outcomes & Timescales
major Studios and encourage its use.	them with opportunities in the wider Film and TV Production ecosystem.	from the Film and TV Production sector.				students looking to break into the industry.
1-9: Animate and support links between the major Studios and schools in Hertfordshire.	There is a need to attract new entrants and also to increase diversity across the Film and TV Production sector workforce.	This will lead to a series of relationships between schools and the Film and TV Production sector, resulting in visits to Studios, etc.	Medium	Hertfordshire Careers and Enterprise Company and Studios.		By the end of 2022, we will establish a showcasing visit programme coordinated by the Careers and Enterprise Company linked to Film and TV studios in Hertfordshire which encourages regular links between industry and schools.
Outcome 2: Novel business models across the wider ecosystem consistent with productivity gains						
2-1: Put in place an innovation challenge fund.	Given the continuing reliance on the freelance model, and the need for 'disruption' and productivity enhancements, this fund will support innovation in the sector and the development of new arrangements within the supply chain.	There will be a new scheme which can be a flagship for change and creativity in relation to business models.	Medium	Hertfordshire LEP/ ESTU		Establish small revenue and capital grant innovation programme modelled on the LEP's pilot Service Innovation Programme.
2-2: Raise awareness of the opportunities within the Film and TV Production sector for SMEs across Hertfordshire.	There are opportunities for a raft of service providers in Hertfordshire to work with, and for, Film and TV Productions in the county. However there is a need to	Information and insight will be channelled through Hertfordshire Growth Hub.	Medium	Hertfordshire Growth Hub		Establish sector specific "market place" and publicise on line, to enable firms to locate each other.

Action	Rationale	Deliverables	Priority (HML)	Lead organisation	Resources	Outcomes & Timescales
	'build the market' and raise awareness on both sides.					
Outcome 3: Net Zero outcomes in Film and TV Production						
3-1: Encourage greater co-operation between Studios and production companies to reduce environmental impacts.	The environmental challenges facing the Film and TV Production sector are significant and urgent. The sector has performed poorly in these terms and given wider commitments to Net Zero, an industry-level response is imperative. There are many possibilities – linked for example to recycling and energy management facilities.	This will result in a series of good practice case studies and a commitment to knowledge sharing, etc. It could also lead to the development of more formal protocols across the sector.	High	Major Studios		Best practice in energy and resource efficiency is accelerated through business-to-business knowledge transfer.
3-2: Support the development of a pilot initiative to enable the re-use of materials linked to Film and TV Production.	Given Net Zero challenges, there is scope for a pilot initiative to enable the re-use of materials such as set components, costumes and props, including through an on-line sharing platform and the provision of warehouse space (for storage).	This will lead to a pilot initiative which may subsequently be rolled out (working alongside national ventures like the Albert Initiative).	Medium	Hertfordshire Climate Change and Sustainability Partnership (HCCSP) and Major Studios.		Studios are able to access local sustainability experts through HCCSP and mitigate their impact on the local environment.
3-3: Potentially working with BRE, develop measures to incorporate	Substantial new Studio space is either planned or proposed in Hertfordshire and it is essential that this is designed	This will result in improved construction approaches within the sector,	High	BRE working with major Studios		Environmental impact of new studio capacity is mitigated by providing access to specific building

Action	Rationale	Deliverables	Priority (HML)	Lead organisation	Resources	Outcomes & Timescales
passive design solutions and other features to reduce energy and water use in new Studio space in Hertfordshire.	in a way that is consistent with Zero Carbon imperatives. Through BRE, Hertfordshire has world class credentials in this context, and there is a real opportunity to use these to support the 'good' development of the sector.	particularly in relation to major Studios.				expertise in new materials and construction techniques.
Outcome 4: Commercial property solutions for Film and TV Production						
4-1: Develop a schedule of potential sites for use by the Film and TV Production sector and to attract internationally mobile Foreign Direct Investment.	There are major issues linked to the provision of sites and premises. In this context it would be appropriate to identify mechanisms to prepare a schedule of potential sites (both permanent and 'meanwhile') and an appropriate vehicle for to bring these forward; and to develop a longer term sites pipeline, focusing on opportunities within emerging Local Plans to identify longer term opportunities to further grow the cluster, particularly over the years 2023 – 2028.	This will produce a schedule of sites that is available for all partners to use and will feed into inward investment activities to attract further investment into the county.	Medium	Local authority districts/boroughs		Film and TV sites register (greenfield and brownfield) established by end June 2022 and supports inward investment activity.
4-2: Actively encourage planning policy statements	The Film and TV Production sector is strategically important for Hertfordshire.	Local Plans will be aligned to the needs of the Film and TV Production sector	Medium	Local authority districts/boroughs		Strategic Planning Policy statements specific to Film and TV are developed and

Action	Rationale	Deliverables	Priority (HML)	Lead organisation	Resources	Outcomes & Timescales
to recognise the strategic importance and potential of the Film and TV sector.	However there are significant challenges in securing appropriate sites given the loss of employment land across the county. Positive planning policy could help in this context.	as they are revised and refreshed.				referenced in major planning decisions for new studio space.
4-3: Use the development process to help advance the wider Action Plan for Film and TV Production.	There is substantial developer interest currently and it is important that steps are taken to ensure that S106 agreements linked to new Studio space are aligned with the needs of the sector, particularly in respect of workforce skills.	The development process will be harnessed to deliver wider outcomes.	High	Local authority districts/boroughs		Proceeds of development gains are recycled back into activities which further support the growth of the industry and support community participation in the sector.
Outcome 5: Outstanding digital infrastructures for Film and TV Production						
5-1: Ensure that Hertfordshire's digital strategy is advanced with the needs of the Film and TV Production sector firmly in view.	There is evidence that Hertfordshire's digital infrastructure is struggling to keep up with the pace of growth in the Film and TV Production sector. The more general issues are considered in the Digital Strategy which has been developed by Hertfordshire Growth Board. The actions within it need to be developed and delivered.	This will result in fit-for-purpose digital infrastructure which enables – rather than slows – the growth of Film and TV Production in Hertfordshire.	High	Hertfordshire Growth Board		Small firms operating in the sector have access to world class full fibre broadband.

Action	Rationale	Deliverables	Priority (HML)	Lead organisation	Resources	Outcomes & Timescales
Outcome 6: Hertfordshire as a location for Film and TV production which is recognised around the world, promoted effectively and valued fully						
6-1: Provide access to local authority experts to manage Film activities at locations within Hertfordshire through an enhanced Hertfordshire Film Office.	Many Film productions require filming to be carried out on public highways. The sector requires that the process of carrying out any filming is well supported by the public sector, runs smoothly and efficiently, minimises any disruption to highway users and if possible helps minimise the cost of filming to production companies.	We will develop a collaborative approach to handling and managing filming requests and coordinate local responses efficiently and effectively. We will also seek to work as part of Creative England's 'Filming in England' Partnership.	High	Hertfordshire County Council (Highways), local authority districts and boroughs, and Creative England.		A well-resourced, well trained and effective Hertfordshire Film Office is relaunched in winter 2022.
6-2: Develop a managed approach to the growth of Film tourism across Hertfordshire.	Building on the progress that has already been made, there is a need for a greater dialogue and more collaboration between Film and TV producers and local authorities in Hertfordshire to ensure that the potential of 'Film tourism' is fully recognised and supported – and that the environmental effects are appropriately mitigated. Potentially Film tourism is itself an additional major contributor to the local economy.	This action will build on the on-going work of Visit Herts. It will lead to the development of a clear and consistent approach to the promotion and management of Film tourism across the county. It will build on good practice which already exists and make it more consistent.	High	Visit Herts, local authority districts and boroughs, and Hertfordshire County Council.		Number of day and long stay visitors related to the Film sector is increased on 2019 baseline.

One Garden City, Broadway, Letchworth Garden City, Hertfordshire SG6 3BF
01462 244700 | info@hertfordshirelep.co.uk | www.hertfordshirelep.com | Twitter: @HertsLEP