INTERNATIONAL STRATEGY FOR THE UK CREATIVE INDUSTRIES

2019 → 2022
THE GOVERNMENT WELCOMES the publication of this industry-led strategy. Exporting is vital to the UK economy and lays the foundation for a truly Global Britain. The UK’s Creative Industries are an exporting powerhouse and a key sector for the UK’s future prosperity, as recognised by the Creative Industries Sector Deal.

From Harry Potter to Grand Theft Auto, Saatchi & Saatchi to Savile Row, they are the face of our world-class artistic and cultural output, garnering respect from around the globe. According to DCMS, the value of the creative industries to the UK is up from £94.8bn in 2016 to £101.5bn now and has grown at nearly twice the rate of the economy since 2010.

This strategy sets out how working in collaboration, government and industry can together promote the UK as a global powerhouse of creativity, a great place to invest and seize opportunities overseas; as well as support creative business in facing global economic challenges.

Government looks forward to the Creative Industries Trade and Investment Board developing an action plan for the recommendations within this strategy.

Above left
The Rt Hon Jeremy Wright QC MP
Secretary of State for Digital Culture, Media and Sport

Above right
The Rt Hon Liam Fox MP
This is a vital part of the Creative Industries Sector Deal struck between Government and the Creative Industries Council as part of the Industrial Strategy. With the closer collaboration that this is delivering, we will step up to the challenge of leading on the strategy for industry and Government to expand our export support work with Britain’s creative businesses.

With exports in goods from the sector worth £13.2bn in 2016 and services exports worth £27.1bn, we are well placed to build on our strengths to place the creative industries at the heart of Britain’s future prosperity. Our ambitious target is to increase creative exports in goods and services combined by 50 per cent between 2018 and 2023 and significantly increase the number of exporting creative businesses across the UK.

We now contribute more than £100 billion to the UK economy and our track record over the last few years has been strong. In the next five years, we can show again that backing British creativity will help us promote the UK as a great place to live, work, visit, do business and invest, grow the economy and maximise participation in culture. The international profile and diversity of Britain’s creative industries is a bedrock of the country’s soft power and influence overseas too.

This strategy begins a new stage in industry’s relationship with Government, where we work together to drive the success of our vibrant and exciting sector. We look forward to developing an action plan for the strategy to make sure that creative talent from all walks of life and across the whole country gets the opportunity to contribute to Britain’s success and tell our collective story.

The UK’s reputation for ideas, flair, talent and imagination comes from the combination of our rich cultural heritage and cutting edge creative companies. This lies at the foundation of our international success and the Industrial Strategy rightly places these at the heart of our competitive advantage in a fast changing global economy. Through this strategy, the Creative Industries Trade and Investment Board can help the sector continue this great British success story.
INTRODUCTION

The establishment of the Creative Industries Trade and Investment Board (CITIB) was agreed in 2018 within the Creative Industries Sector Deal as part of the Industrial Strategy.

The aim of the Board is to elevate industry leadership and ownership of the trade and investment strategy. The Board has established two ambitious targets. First, increasing creative industries goods and services exports 50% by 2023 and second, significantly increasing the number of creative businesses exporting.

This document sets out how the Board aims to work with Government to meet the targets and what actions are required to achieve them. In support of the strategy, Government and industry have been consulting on priorities for each of the subsectors. The Board will review the strategy and update it each year on a rolling basis. The Board also sees inward investment as a priority and will set up a bespoke group to focus on this area.

The Government provides critical support to international trade, especially through the Department for International Trade’s (DIT) funding schemes. These support industry export campaigns and help ensure we have a substantial presence at key trade events across the world. Coordinated support of this kind is particularly important for the creative industries, as it is comprised of a diverse range of sub-sectors and a large number of small and micro-businesses.

However, it has been recognised that the effectiveness of this support, combined with industry’s own investment, could be significantly improved through a more strategic, industry-led approach.

In the past support has been fragmented, difficult to navigate and prone to change at short notice. It has also tended to be focused on generically designated priority markets, rather than those identified as having the highest potential for the creative industries. This has meant opportunities have been missed through the lack of scope for advanced strategic planning.
This led to the establishment of the CITIB, as part of the Creative Industries Sector Deal agreed between Government and industry in 2018, under the leadership of the Creative Industries Council. The CITIB includes representatives from all parts of the creative industries, as well as Government, and is tasked with developing and overseeing a cross-industry strategy to maximise the effectiveness of Government and industry plans, to ensure they are complementary, aligned and allow businesses to embrace new opportunities. As agreed in the Sector Deal, the Government will use this strategy to guide them in ensuring resources are targeted to maximise opportunity.

This marks a shift from the previous system where DIT set annual strategy, funding allocation, eligibility criteria and approved grants, to one with more decision-making in the hands of industry representatives. As part of these changes, industry has committed to investment, which, on aggregate, at least matches the total government contribution. The Board will establish a transparent reporting mechanism to measure this.

To achieve its goals this strategy sets out actions for industry and Government, working together in order to:

- **Take more small and medium sized businesses out to market**
- **Establish greater industry leadership in its partnership with Government**
- **Provide strategic guidance on key markets to target and priorities for resourcing**
- **Inspire new exporters**
- **Increase inward investment into UK creative businesses.**

Through its Inward Investment Subgroup, the Board will also explore, support and advise on high-value opportunities for inward investment and foreign direct Investment.

This will inform funding processes in DIT including annual spending plans developed between DIT and each subsector, to be overseen by the CITIB.

Our target is to increase creative industries goods and services exports **50% by 2023**.
Since the establishment of CITIB, there have been significant changes in the way industry works with Government.

This has included a developing programme of industry-led activity both within individual subsectors and across the sector as a whole.

At a subsector level, some trade associations have taken a proactive lead in expanding their programme of international activity and in developing digital tools to aid export growth. Many subsectors have begun to establish their own Export Accelerator tools following the successful Producers Alliance for Cinema and Television (PACT) initiative.

Export Accelerators are custom-designed online tools to help UK producers create their own export strategy for their businesses. The resources can be one-stop shops to help firms create their export strategy, and include advice on how to do more effective business overseas as well as listing upcoming opportunities to attend overseas markets and missions. The model is adaptable and can be designed to suit the needs of individual subsectors. The Board also recognises that improved results and a greater scale in international business support can be achieved when industry takes the front foot in planning and where businesses are included in the planning process earlier than usual.

An example of this is Promote UK, a partnership between the advertising associations and DIT focusing on advertising services export promotion, is seen to be a model that could be replicated with other sub-sectors. These developments were given a welcome boost in September 2018, when the Department for Digital, Culture, Media and Sport (DCMS) committed an additional £1m of funding to create a programme of activity to enhance trade and investment activity in the creative sector. In a process that reflected the new industry led approach, subsector representatives to the Board submitted a list of potential activity, which the Board then reviewed to identify the most high value opportunities before making its recommendations to DIT.

This process widened the range of types of activity usually funded by DIT and demonstrated how industry and government can improve the provision of export support and how they can add greater value by working together more closely. Industry views this initiative as a success and it demonstrated the capacity of the sector to make productive use of additional government funding when it becomes available. With this funding the Board promoted the UK creative sector in 10 countries. Industry and Government have been able to report that this activity has generated a pipeline of more than £200m of export opportunities.

The funding also brought more than 150 overseas buyers and influencers into the UK to meet with UK creative companies and created digital assets to promote the UK fashion, craft, textiles, games and advertising sectors to a global audience. The Board’s decisions improved the UK Film, TV and Games investment offer to key overseas influencers—a market which is worth more than £2bn in inward investment into the UK every year—and created more than 40 different pieces of activity that will enhance trade and investment in the UK creative sector. The funding amplified the UK Design offer in the Food & Drink, Hospitality, Healthcare and Retail sectors.

The activity recommended by the Board also facilitated more than 250 UK companies in building their own export strategies and took more than 150 UK companies overseas to give them access to thousands of buyers and influencers in key overseas markets.

Sub sectors and working groups have also come together to form more bespoke groups focusing on specific sub sectors. We have seen groups form around design, advertising, music, immersive technology and inward investment. Industry has also brought in a full time secretariat and convenor to coordinate the work of the Board.
KEY MARKETS
AND PRIORITIES FOR INTERNATIONAL BUSINESS SUPPORT

Government provides critical support, alongside industry’s own investment, to industry-led export promotion activities, for example in facilitating industry participation in key trade events and campaign activities around the world. These activities have a good track record of success in helping UK creative businesses close commercial deals in overseas markets. However, the Sector Deal recognised that this support could be significantly more effective with a greater level of cross-industry coordination.

A key focus for the Board is to develop a shared, industry-wide view of strategic priorities for export support, in order to guide both Government and industry spending. In particular the Board has assessed the key export markets for each of the creative industry subsectors, in order to prioritise support for activities in those markets where the commercial opportunities are greatest for UK creative businesses and which therefore offer the greatest potential for growing British creative exports.

There is inevitably some variation between subsectors, and it is important that the allocation of export support resources continues to allow for this. However there is substantial common ground and the Board considers that, in order to maximise the impact of support, a priority should be put on those markets which are identified as high potential for most or all creative industry subsectors, and that, where possible, support should be coordinated across the industry.

The Board has identified five key strategic markets which should be prioritised for Government and industry export support:

- China
- USA
- Europe
- Middle East
- Japan

These key markets include territories offering large opportunities for growth over the next few years as well as mature markets ideal for British businesses to begin exporting for the first time.

While these markets are the priority focus at strategic level, they should not be the exclusive focus. There will be territories and events outside these markets which are of equal importance to individual subsectors; these are likely to include, for example, India, South Korea, the African continent, Australia and the Gulf countries. Industry will work in partnership with Government to ensure that, regardless of geography, specific high value opportunities are brought forward and considered for bespoke activity.

Support should also be made available for activities in other markets, where these are identified as top priorities for individual subsectors.

The Board will keep these priorities under review, for future iterations of this strategy.
There is a large number of key trade shows and other events across the industry which provide opportunities for UK creative businesses to showcase their products, build their international profile and find new commercial opportunities. The Board has identified over 80 such events which could potentially be supported in 2019 alone. Many of these are specific to individual subsectors. However there will be some flagship events which are of importance to several subsectors: examples include Cannes Lion, SXSW, the Dubai Expo and a number of events in Japan in the build up to the Rugby World Cup and the Tokyo Olympics. The divergence of creative industries with its large number of sectors and diverse set of SME’s is a significant factor in the number of events and markets that may fall out as a priority for the sector as a whole.

The Government has appointed nine Trade Commissioners to lead efforts in each region of the world to promote UK Trade and prosperity. HM Trade Commissioners (HMTCs) lead Government activity in market and cooperate closely with Ambassadors and High Commissioners. They control budgets for supporting British exports. HMTCs can therefore play a key role in helping to build the profile of UK creative industries in our priority markets and identifying new commercial opportunities for our businesses.

The Board will work with DIT to develop links with Trade Commissioners in the identified priority markets, and ensure that they are well placed to promote the UK’s creative industries.

The Board will aim to provide regular written briefs to relevant Trade Commissioners and will explore the possibility of an annual roundtable event for UK industry and HMTCs covering key markets.

DIT has more than 100 offices in over 90 countries which is a potentially vital resource.

The Board recommends that DIT reflect the Boards key markets and sub sector priorities in the deployment of its own teams in market.
As well as supporting specific events, DIT and DCMS organise regular ministerial visits and trade missions to overseas markets in order to boost the UK’s trade and investment relationships. These can offer important additional opportunities for trade promotion, and for businesses to establish and strengthen contacts in key markets. The Board proposes to work with DIT to maintain an overview of upcoming visits so that, where appropriate, it can help to ensure that participation by the creative industries is coordinated and benefits for the sector maximised.

The Board proposes to work with Government to ensure that, where relevant, ministerial trade visits overseas and trade missions are coordinated to ensure that industry can make the most of these opportunities.

The priorities set out above are primarily intended to guide the direct support for international trade provided by DIT as well as associated industry activities. However, there are other Government initiatives which can also make an important contribution to the growth of our industries’ trade abroad.

Two important examples are the GREAT campaign and Innovate UK.

The GREAT campaign, a major international promotional campaign, launched in 2012, which “showcases the best of what our whole nation has to offer to inspire the world and encourage people to visit, do business, invest and study in the UK.” The UK’s global leadership in the creative industries is a key feature of the campaign, which has also recently set up a specific “Exporting is GREAT” strand which includes a range of advice and guidance aiming to inspire and support 100,000 new UK exporters across the economy by 2020.

The creative sector is a key element of each pillar of the GREAT campaign.

Industry is committed to working in partnership with each pillar of the GREAT campaign and each sector will explore opportunities to work with individual pillars to maximum effect.

Innovate UK, a part of UK Research and Innovation, supports innovative businesses to access global markets, link with global partners and become integral to global supply chains, as part of its mission to accelerate innovation and drive R&D investment across the economy. Innovate UK has recently piloted a new international programme aimed at growing new global supply chains, and in 2018/19 ran some 30 Global Expert Missions and Global Business Innovation Programmes, two of which had a specific creative industries focus. The Board and Innovate UK will ensure that activity is more effectively co-ordinated so that where our objectives complement each other we work in partnership to promote UK excellence and innovation in key markets.

The Great Campaign and Innovate UK are both represented on the Creative Industries Trade and Investment Board.

The Board will work with relevant parts of Government to ensure that, as far as possible, key sources of international trade support outside DIT – including the Great Campaign and Innovate UK programmes – are also aligned with this strategy.
FUNDING COMMITMENTS

The Board welcomes the DIT’s plan to spend at least £4m in 2019/20 to support export activity in the creative industries via its campaigns in priority markets and the Tradeshows Access Programme (TAP), or equivalent funding streams. The priority market campaigns and TAP programmes are the DIT’s main channels for providing direct export support: the activity to be funded each year in relation to the creative industries will be set out in annual plans agreed with each subsector and, in aggregate, with the Board in line with this strategy.

- TAP is a grant scheme, which enables businesses to attend key trade fairs. Where DIT agree with industry partners to establish which overseas trade shows they will provide grants for UK businesses to attend. The programme provides grant funding for eligible businesses towards the costs of exhibiting at overseas trade shows. Attending overseas trade shows helps firms gain essential market knowledge and DIT assist firms in making new contacts, gaining experience in attending and getting the most from these events.

- The predominance of SMEs in the creative sector makes the TAP programme a vitally important mechanism to explore new markets and reach new customers. In the last three years companies from film, TV, Games, publishing, advertising, craft and design sectors have all enjoyed TAP support and generated £100’s of millions in export revenue.

Industry confirms its commitment, as set out in the Sector Deal, to investment in similar support activities, which in aggregate, at least matches the total Government commitment. In order to monitor this, each subsector will report annually to the Board secretariat on total cross-sectoral investment in relevant activities. The Board will report an aggregate figure to DIT. Resources within scope for this purpose are those which:

- are focused directly on support for international trade
- are provided on a cross-sectoral basis, for example through trade bodies (as opposed to investment by individual businesses in their own export activities).

The Board will monitor and report on industry’s commitment to match the Government contribution to export support. The Board recognises that Government will only be able to provide a proportion of the funding support needed to take forward all of the critical actions that will be needed to enable Creative Industries to reach its potential. Government and Industry are committed to working in partnership through the Board to explore other sources of funding.

The Government contribution for the current year matches the level for 2018/19. The Board recognises that the budget for future years will depend on DIT business planning, but hopes that the overall level will be at least maintained given the importance of these streams to the achievement of our overall ambition. The Board will welcome further engagement with DIT on this, including the potential case for increased contributions, in line with the match-funding commitment.

In the medium term, the Board would like to pursue further increases in the degree of industry control and coordination over international trade support funding and activities – as described in more detail in the next section. DIT have agreed to work with the Board towards this aim over the period of this strategy.
As a sector, the creative industries have a high proportion of small businesses and micro businesses (some 95% of businesses in the sector have fewer than 10 employees). Although the industry as a whole has a strong track record in exporting, it is estimated that around half of all creative businesses do not export at all. A bespoke approach is required from both Government and industry bodies in order to reach these businesses, increase the number of exporters and ensure they are to make the most of the support available and reach their full potential.

The Board considers that industry is best placed to understand in detail the specific needs of businesses in individual subsectors. The Board will therefore commit to a number of industry-led activities designed to provide specialist help and enable new exporters to engage with and benefit from Government programmes.

**Export Accelerators**

**Aim:** to offer sector-specific practical export planning support enabling businesses to build and execute their own strategies.

Export Accelerators are custom-designed online tools to help UK producers create their own export strategy for their businesses. The resources can be one-stop shops, including step-by-step guidance for firms to create their export strategy, as well as advice on how to do more effective business overseas and access to sector-specific information on key markets and opportunities to attend overseas markets and missions. PACT has a well-established accelerator programme, which the Board views as a highly successful model with potential to be adapted to provide businesses across the creative industries with practical export planning support.

PACT originally launched its Export Accelerator as a series of workshops that toured the nations and regions. Experts from a range of backgrounds delivered hands-on, practical sessions which provided producers with the basic structure to create their own export strategy. PACT launched an online version of the accelerator in autumn 2018. The basic accelerator model is highly adaptable and be designed to suit the needs of individual subsectors. Several subsectors have begun to follow PACT’s lead in developing Export Accelerator programmes of their own. The Board is keen to see this approach expanded across the sector, in order to substantially increase the number of creative exporting businesses around the UK.

Each subsector will consider how best to provide support for new exporters, including the case for establishing its own export accelerator programme, with plans in place by the end of 2019.

**Workshops**

**Aim:** to build supportive networks for businesses looking to export

Many industry bodies run programmes of workshops to bring members together and offer insights and expertise on a range of business areas, including building international trade. In addition, the Creative Industries Council and the Creative Industries Federation have been developing an industry-led Creative Kickstart programme — a series of events providing specialist advice to creative enterprises in specific locations, on topics ranging from access to finance and financial management through to exports and IP.
Starting later this year, Creative Kickstart will be delivered by the Creative Industries Federation, together with a number of partners within the sector and beyond. CITIB will work with the Creative Industries Federation and others on the design and delivery of workshop sessions that give focus to exports and international profile to help creative businesses outside London to grow. Such workshops can empower creative enterprises looking to grow to address key business challenges and opportunities by equipping them with the knowledge and insights needed from experts and industry leaders, as well as facilitating business connections, mutually beneficial partnerships and knowledge-sharing between creative enterprises and entrepreneurs in a local area.

Export Advocates, Export Champions and Industry Ambassadors

**Aim:** to harness the expertise of established industry leaders to inspire new exporters and help promote the creative industries abroad.

Businesses which have already successfully developed trade links with international markets can play a key role in encouraging others in their sectors to start exporting and offering practical advice in how to do so. As part of the Export is GREAT programme the Government are creating advocates who’s “export stories” can be told and amplified to inspire companies to think about exporting opportunities for themselves. The sector will work in partnership with Government to ensure that the creative sector is well represented in the advocates campaign.

In addition, the sector will work independently to develop a network of individual Champions for our industries to augment existing initiatives and help to raise the profile of exporting among new businesses, Industry will work to identify leaders within each subsector of the creative industries to offer expertise and guidance to support other companies on their exporting journey by promoting peer-to-peer learning. By doing this for the creative sector we will complement the activity delivered by Export is GREAT.

The Board will work with DIT to build a network of Export advocates to showcase in the Export is GREAT programme and recruit its own champions to offer more focused support to new exporters.

Alongside this, industry will aim to recruit a number of industry leaders with an established presence in key markets as Creative Industry Ambassadors to help promote UK creative industries abroad. These would be senior figures from industry businesses which already have substantial presence in overseas markets.

They would be furnished with knowledge and briefing material so that they can promote the wider strengths of the UK’s creative sectors in the course of their travels abroad, and at cross-industry events domestically.

Trade associations for each subsector could recruit a small number of these individuals each and provide them with relevant training and support. Overall, a diverse network of Creative Industry Ambassadors could help to amplify the export promotion work of trade associations and others, help the industry to open new avenues abroad and demonstrating the strengths of the UK creative industries and the contribution they can make both domestically and abroad.

**Board members will aim to recruit industry leaders with an established presence in key markets as Creative Industry Ambassadors to help promote UK creative industries abroad.**

These initiatives will help to provide the bespoke support and advice needed in order to substantially increase the numbers of UK creative businesses exporting successfully, and to help them engage with the wider financial and advisory support available through. In particular, where appropriate, the industry will look to work with and add value to existing more generic activities such as Exporting is GREAT and Open to Export.

Export is GREAT is a key pillar of Government support to inspire UK companies to think about exporting. Industry are committed to working in partnership with the Export is GREAT team to ensure that the sector maximises the value of any collaboration.
Working with Larger Companies

- More than 95% of companies in the creative sector are SME’s and many of these have fewer than 10 employees. In that respect much of this strategy is focused on support that will most effectively enable SME’s develop and maximise their export opportunity.
- However, Government is still committed to ensuring that it is able to add value to larger companies export activity.
- DIT will aim to maintain focused account management relationships with key UK companies across the sector.
- In addition, the group is committed to work in partnership with the Creative Industry Councils to bring forward and address policy issues that may unlock export potential.
- Government will continue to work in partnership with the largest and most innovative exporters in the sector to provide appropriate platforms in overseas markets. This will include but not be exclusive to Government to Government opportunities such as the UK-China High Level People to People Dialogue.
- Government will look to build and maintain networks and forums which can bring key companies together, both in the UK and in overseas markets.

The creative industries have a high proportion of small and micro businesses with 95% having fewer than ten employees.

Inward Investment

As well as increasing exports, the Board recognises the vital importance of inward investment into the UK’s creative industries, both as an enabler of growth within the sector and as a key contribution to the UK economy. Our creative industries have a good record of attracting investment, reinforcing the UK’s status as a global hub for our sectors. For example, the film and TV industries alone were responsible for over £2.3bn of inward investment in 2017, linking the UK’s role as a world-class location for high-end production. The UK games industry secured at least £1.75bn of overseas investment into UK companies between 2015 and 2017.

The Board is keen to enable the creative industry subsectors to work together in order to maximise the UK’s attraction to inward investment from overseas. The UK is a highly attractive location for international investment and maintaining this is vital to the country’s continuing economic strength, as well as the future success of the creative industries themselves. The Board has established an Inward Investment Subgroup to develop proposals, by autumn 2019, for cross-industry action to maximise inward investment into the creative industries, in order to maintain and grow the UK’s position as an international hub.

This Inward Investment Subgroup will identify actions aiming to:

- articulate the UK’s 3-year vision for inward investment and ensure that we maintain and grow our position as the European lead for inward investment
- promote investment into UK regions and devolved nations, whilst still maintaining London’s position as a global hub for creativity
- ensure that the status of the UK creative sector as a driver of technical innovation is effectively articulated across industry and Government to grow the FDI base
- maximise growth and further investment (both fiscal and FDI) from current investors and new investors
- maintain the UK’s position as the premier location for capital investment.
Measuring Progress

The Board will measure progress against the key objectives of this strategy, using existing datasets wherever possible. The Board will judge progress against the overall 2023 target for increasing export levels primarily through the ONS-endorsed official statistics as provided by DCMS. These are recognised as world-leading, although a recent report by the Creative Industries Federation suggests that they may underestimate the overall level, due in particular to difficulties in capturing the full value of digital exports. A subgroup of the Board will work with Government to consider whether there are opportunities to further improve the exports figures for goods exports and services exports.

The Board will monitor progress against the key objectives of this strategy, including the total value of creative industry exports, the reported return on investment for core export support, the numbers of creative businesses exporting, the diversity make up of exporters, and levels of inward investment.

The Board will continue to work with Government and others including the Policy and Evidence Centre over the course of 2019/20 to ensure that data on the level of creative industry exports is as robust as possible, as the key outcome measure linked to this strategy.

EXPORTS
UK Creative Industries Exports 2016

£27 bn 11% +84%

Value of Service Exports a year Percentage of total UK Services Exports 2016 versus 2010
Industry and Government have long worked side by side to sell the best of British creativity overseas and to support both established and aspiring creative exporters. The support from Government, both from UK based teams and those overseas, is highly valued and seen as vital by industry.

As noted in the introduction, the establishment of the CITIB and its development of this strategy represent a significant change in this working relationship, giving industry much greater responsibility for determining strategic priorities in the deployment of resources supporting creative industry exports. This strategy endorses the shift from the previous system where the DIT set annual strategy, funding allocation, eligibility criteria and approved grants, to one with more decision-making in the hands of industry representatives. In this document, industry sets a long-term strategy, approves a consensus of priority markets and key events, and advises Government accordingly on its priorities. Through this, we will streamline efforts, make the system more efficient, avoid duplication, and improve communication. That, in turn, stands to improve the combined impact of Government and industry activities, helping us to reach our ambition for a 50% increase in exports by 2023.

Further increasing the degree of industry control could deliver still better results and higher export growth, as well as more efficient use of resources, if it were to provide flexibility and scope for clear strategic planning which enabled industry to plan specific activities further in advance than current government support allows.

Owing to the unique challenges and requirements of the diverse set of subsectors within the creative industries, the Board would like to work with the Government to develop new models of support appropriate for each subsector, which could provide industry with substantial autonomy over the use of resources, within an overall strategic approach agreed collectively in the CITIB and while also meeting the Government’s own requirements for value for money, control and transparency.
There is precedent for this approach. Government has previously agreed to operate in this way in relation to the music industry, with the successful Music Export Growth Scheme (MEGS) established in 2013. MEGS is designed to make available grants ranging from £5,000 - £50,000 to UK-registered SME music companies to assist them when looking to introduce successful UK music projects overseas. The grants do not cover the whole cost of international activities and are paid in arrears. While the funds for the scheme, and ultimate control, remain with DIT, the scheme is administered by the BPI on the Department’s behalf as the ‘Accredited Trade Organisations’, with funding decisions made by a panel of industry experts on a shortlist agreed by DIT and BPI. Also in music there is the PRS Foundation’s International Showcase Fund (ISF) which involves DIT as co-funder of music export alongside industry stakeholders.

These approaches show the best practice visible to date in the provision of international business support and industry leadership and provide a starting point for considering approaches to increasing industry control over other elements of the Government’s international business support such as TAP and HVC. This could also help to provide greater coordination, and/or consolidation between the large number of different funding streams from which support is provided.

Where there are sub sectors with district markets and priorities, export opportunities and high export potential, such as animation, the Board and Government will take account of trade body resources and will factor in the investment made by individual companies when developing new ways of working.

Over time, the Board would like to see further increases in the degree of industry control and coordination over international trade support funding and activities. It will work with Government on the scope for further changes towards this aim over the period of this strategy.

The successful Music Export Growth Scheme (MEGS) is designed to make grants available ranging from £5,000 to £50,000 to help UK music companies fund music projects overseas.
WIDER POLICY ISSUES
AND MARKET ACCESS BARRIERS

There are other areas of policy which impact upon the UK’s export performance. These include general market access barriers, intellectual property protection, migration of talent and soft power.

Developments in these areas can have crucial impacts on the sector’s export performance. The Creative Industries Council, which engages with Government on the broad range of policy issues affecting the creative industries, has led in developing cross-industry views in these areas. The Board will work closely with the Creative Industries Council to ensure that its wider policy discussions take account of potential impact on the international profile of UK creative industries, and that briefing on key issues is provided to Trade Commissioners and others who may be engaged in promoting the interests of our creative industries abroad.

The period of this strategy is likely to be a critical one for the future of the UK’s international trading relationships, as it reshapes its relationship with the EU and seeks to secure new trading relationships with countries across the world. We hope that the UK seeks to prioritise relationships with the priority markets listed in this strategy.

The Board will engage closely with Government on the development of future trade negotiations with key countries, in order to ensure that future FTAs maximise opportunities and address any risks for the creative industries.
The success of the UK’s creative industries is overwhelmingly built on the creation and commercial exploitation of IP. The UK has one of the best environments in the world for the protection of and enforcement of copyright, and the Sector Deal set out a number of proposals to strengthen this further. However, in order for international trade to flourish, it is vital that destination markets for UK creative products also have high standards in this area. The development of new trading relationships will offer the opportunity to promote the high standards of IP protection in other markets.

**Intellectual Property**

For some parts of the creative industries, such as architecture, international trade relies on the ability of UK professionals to practice abroad. Mutual recognition agreements enable professionals in participating countries to practice outside their own country without taking additional exams or professional training. They are essential for UK-based architecture firms to compete internationally and play a vital part in the contribution of the sector to the UK economy. Promoting greater mutual recognition of qualifications in trade deals presents a major opportunity to strengthen trade in architectural services with new markets.

**Talent and Migration**

The UK is a world leader in the creative industries in part thanks to the wealth of talent we attract from across the globe. International clients choose UK companies instead of others because the UK offers a pool of talent that provides a wide range of skills, linguistic abilities and cultural awareness to handle global clients and succeed in those markets. This enables the UK creative industries to win business on the strength of their internationally diverse teams and generate more jobs for the UK economy.

We support a flexible system that keeps the UK as an attractive place for people to grow their careers and increase the competitiveness of firms based in this country. Securing the future talent pipeline is a key priority for the future success of our sectors, was at the heart of the Creative Industries Sector Deal. As part of this, it is vital for our future success that any new migration policy and trading arrangements enable our industries to recruit people with key skills from abroad, and to continue attracting and retaining the best creative talents from around the world. Failure to implement a system that enables creative businesses to employ the talented workers they need could result in businesses relocating to other regions or firms falling behind international competitors, jeopardising jobs, tax revenue, and the prestige deriving from the UK’s position as a leading creative industries hub.

Diversity within the UK creative industries will also be an area for deeper consideration. As identified within the Sector Deal, current good practice will reviewed and case study possibilities identified.

**Soft Power**

The UK’s creative industries and institutions are key contributors to UK’s “soft power” abroad: our products, from film, TV and games to literature, art, advertising and fashion help to shape the UKs international image and reputation. The GREAT Campaign, which relies heavily on the creative industries in both content and execution, is a good case study in nation branding and advertising. The creative industries will continue working with the campaign and other initiatives which help to harness our contribution to the UK’s international profile. Feedback from CITIB members has already been communicated to the Government.

The GREAT Campaign is a good case study in nation branding and advertising.
The Board has identified five key markets, which should be prioritised for Government and industry export support: China, USA, Europe, the Middle East and Japan. The Board recommends that Government work with individual subsectors to identify any gaps.

The Board will develop links with Trade Commissioners in the identified priority markets, to ensure that they are well placed to promote the unique interests of UK’s creative industries and work to ensure other Government programmes are aligned to the strategy.

The Board will engage closely with Government on the development of future trade relationships with key countries, in order to maximise opportunities and address risks for the creative industries.

The Board will work with Government to increase industry control and coordination over international trade support funding and activities.

The Board will develop proposals via its Inward Investment Subgroup to maintain and grow the UK’s position as an international hub for FDI and inward investment.

Each subsector will establish its own export accelerator programme if appropriate.

The Board will work with the Creative Industries Council on the design and delivery of workshop sessions to help creative businesses outside London.

The Board will work with DIT to build a network of Export Champions able to offer expertise and guidance to creative businesses looking to export for the first time.

Board members will aim to recruit a number of industry leaders with an established presence in key markets as Creative Industry Ambassadors to help promote UK creative industries abroad.

The Board will work closely with the Creative Industries Council to ensure that wider policy discussions take account of potential impact on the international profile of UK creative industries.

The Board will work to ensure that data on creative industry exports is as robust as possible, as the key outcome measure linked to this strategy.

The Board will regularly review this Strategy to ensure that it is fit for purpose.
Chair
Annette King, CEO Publicis Groupe UK

Government Representatives
Sarah Anderson, Great Campaign
Tom Fiddian, Innovate UK
Mike Bartley, Department for International Trade
Sue Bishop, Department for International Trade
The Department for Digital, Culture, Media & Sport

Industry Representatives
Alan Bishop, Creative Industries Federation
Deborah Dawton, Design Business Association
Jamal Edwards, Founder of SB.TV
Rosy Greenlees, Craft Council
Janet Hull, Institute of Practitioners in Advertising
Tom Kiehl, UK Music
Stephen Lotinga, Publishers Association
Adam Mansell, UK Fashion and Textiles
Dawn McCarthy-Simpson, Producers Alliance for Cinema and Television
Lizzy Moriarty, Representative for the Experience Economy
Amanda Nevill, British Film Institute
Kate O'Connor, UK Screen Alliance
Caroline Rush, British Fashion Council
Jo Twist, UK Interactive Entertainment
Alan Vallance, Royal Institute of British Architects
Deborah Williams, Creative Diversity Network
Stephen Woodford, Advertising Association
Adrian Wootton, British Film Commission

Jon Zeff, Consultant to the Creative Industries Council
Ethan Brooks, BBC Studios