

THE ROAD AHEAD FOR UK

FILM & TV



“The UK is forecast to become the largest entertainment and media (E&M) market in Europe - overtaking Germany - from next year.”

With market value expected to surpass £100bn this year alone, the UK is positioned at the forefront of E&M innovation and growth, setting new benchmarks for the industry across the continent. [1]

PART 1: INTRODUCTION

Almost a year ago, a BECTU report published in July 2024, found that 52% of film sector workers (and 51% of TV workers) were reported to be out of work. Whilst this is a reassuring decrease from the 68% who reported they were out of work six months earlier, it is not surprising that 70% of those reported they were struggling with their mental well-being [2].

“SURVIVE TO 2025” [3]

became the rallying cry for UK TV producers, capturing the industry's deep uncertainty even after the SAG-AFTRA strikes ended in November 2023. The aftershocks continue to reverberate across the UK, amplified by mounting economic pressures and global instability. Ripples from U.S. labour disputes threatened to escalate

into a full-blown tsunami, most notably following Donald Trump's widely publicised post on Truth Social suggesting a 100% tariff on imported films into the U.S. While the post lacked policy backing, its inflammatory nature sent shockwaves through global markets and served as a stark reminder of the volatility surrounding international co-productions and global content distribution. It is often said you must be an optimist to succeed in an industry as uncertain as TV, where demonstrating resilience in the face of rejection, creative problem solving and long-term vision are all pre-requisites contributing to success.

The new Labour government's budget signals a cautious yet optimistic commitment to the creative industries. Despite ongoing economic pressures, the budget introduced targeted investments welcomed by industry bodies like BECTU [4].

Key measures include the introduction of VFX tax relief from April 2025, £25 million in devolved funding for regional studio developments such as Crown Works in Sunderland, and a £3 million initiative to promote creative careers in schools. These steps signal a renewed focus on long-term sustainability, job creation, and skills development across the media and production sectors, though industry voices continue to call for broader, more comprehensive support.

Combine this with the renewed UK-EU trade agreement, welcomed by Bectu as a “positive step forward”, the easing of barriers to collaboration, talent mobility, and market access offers much-needed stability. With clearer pathways for co-productions and international partnerships, we can be hopeful that the industry is set to regain momentum and grow with confidence.

52%

of film sector
works out of work
in July 2024

70%

struggling with their
mental health

£380

In a major boost to the sector's recovery, the UK government announced in June 2025 a £380 million package to support the creative industries, with a strong focus on innovation, regional development, and skills [5].

This includes £200 million to support the UK's film and TV production infrastructure through the UK Research and Innovation's Convergent Screen Technologies and Performance in Realtime (CoSTAR) programme, and an additional £80 million to expand the Creative Industries Clusters Programme. The funding aims to drive growth across regions, stimulate investment, and help build a future-ready workforce equipped to meet emerging industry needs.

This whitepaper provides practical guidance for UK film and TV production companies as they gear up for the summer peak and plan for 2026. It highlights key industry trends, challenges, and opportunities, with actionable recommendations to help businesses adapt, innovate, and thrive.

PART 2: TV & FILM LANDSCAPE

Global demand from streaming platforms remains the biggest driver of UK film and TV production.

Services like:

- **Netflix**
- **Amazon Prime**
- **Disney+**
- **Apple TV+**

continue to invest in UK-based productions, due to the country's strong creative talent, high production standards, and favourable tax incentives.



This demand has led to:

- Increased Production Volume with a record number of projects in development and production.
- Infrastructure Expansion and the construction of new studios and expansion of existing.
- Talent Shortages with high demand for skilled crew and production staff, intensifying competition for talent (according to BECTU 68% of UK TV freelancers have considered leaving the industry within the past year, driven by inconsistent job opportunities, financial instability, and poor management practices) [6].

FREELANCER RESILIENCE AND FAIR WORKING CONDITIONS

Freelancers remain the lifeblood of UK film and TV, comprising 30% of the workforce. Yet many continue to face income volatility, inconsistent contracts, and poor workplace protections.

The government's appointment of a Freelance Commissioner [7] in June 2025 reflects a growing commitment to improving freelance working conditions.

Production companies can play a role by adopting best practices such as prompt payment terms, clear contract structures, and access to wellbeing resources. These measures not only support individual workers but also help retain skilled talent in the industry.

The UK's combination of creative excellence, state-of-the-art facilities, and supportive fiscal policies continues to draw significant investment from global streaming platforms. However, stakeholders should remain vigilant regarding international trade policies that could influence the industry's dynamics. While streaming demand is the leading driver, there remain other supporting factors.

30%





GOVERNMENT SUPPORT AND TAX INCENTIVES

The UK House of Lords has continued to actively engage with the film and creative industries throughout 2024, and 2025. Discussions centred on boosting the sector's global competitiveness, supporting regional film production, and enhancing skills development.

Several outcomes emerged:

1. **New Tax Incentives:** The government announced reforms to tax reliefs for film, TV, and video game productions, aimed at encouraging more culturally British content and expanding the UK's creative economy. [8]

2. **Regional Investment and Studios Expansion:** Parliament discussed various regional development projects, including sound stage investments in Sunderland and a proposed film office in Rochdale. MPs highlighted projects like Shinfield Studios in Berkshire and the growing Cornish film industry. [9]

3. **Levelling-Up Agenda:** The government reinforced its commitment to cultural investment outside London, pledging funds through Arts Council England. This aims to reduce regional disparities in creative industry funding and promote nationwide economic growth. [10]

4. **Sector Vision for Creative Industries:** Although publication of the UK's sector strategy for the creative industries has faced delays, ministers reaffirmed their commitment to a comprehensive strategy addressing workforce skills, AI integration, and wider industry access. [11]

5. **New Investment Announcement (June 2025):** A £380 million funding package was introduced to accelerate innovation and regional growth in the creative industries. Key investments include £200 million towards advanced production technologies via the CoSTAR programme, and further support for creative clusters and business support schemes across the UK industry access. [12]

These initiatives reflect a multi-faceted approach to fostering the UK's film and creative industries, and a focus on wanting "The UK to be the best place in the world to make films, because we have the right ingredients: the investment, the talent, the technical skills, the sound stages, the creative imagination and the right fiscal and regulatory environment and recognising" (Baroness Twycross). [12]

"For its size, the film production industry produces significant emissions and requires systemic change to reach net zero carbon emissions and to be environmentally friendly." [19]

INFRASTRUCTURE AND EXPANSION

Underlining the UK's growing status as a global film and TV production hub:

1. Shepperton Studios Expansion: Unlike many companies in the industry, Pinewood, which also owns Shepperton Studios, remained resilient during the strikes due to long-term contracts already secured. Shepperton Studios have significantly expanded to meet increasing demand for production space, with a £400 million expansion completed in 2024. Positioning Shepperton as one of the largest film studios globally, generating over 1,500 jobs and contributing to the local economy. [13] David Conway (CEO of Pinewood Group) said - in The Times - of the wider British film production sector "We're going to have more normalised growth going forward, inflation-like growth."

2. RD Studios in London: A £20 million film studio has been built in West London, featuring five new sound stages, post-production facilities, and a sustainability-driven design. The project is part of a broader plan to create 250,000 square feet of studio space over the next five years. [14]

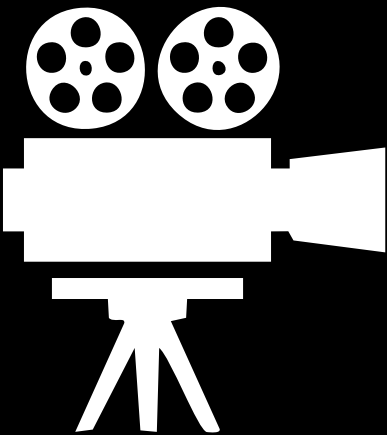
3. Leavesden Studios Expansion: In September 2023, Warner Bros. announced a substantial expansion of their Leavesden facility, located on the outskirts of London. The plan includes adding 10 new sound stages and 400,000 square feet of production and support

space, increasing the studio's capacity by over 50%. Construction started in May this year, with completion expected by 2027. This expansion aims to establish Leavesden as a primary production hub for DC Studios. [15]

4. Recently Opened Shinfield Studios: A £250 million film and TV production facility near Reading, Berkshire completed in June 2024. [16]

Other upcoming projects include Marlow Film Studios in Buckinghamshire and Holyport Studios in Berkshire, both of which have encountered planning challenges due to their greenbelt locations. In Q3 2024, the government intervened by calling in both planning applications, taking responsibility for the final decision pending reports from the Planning Inspectorate, once again demonstrating their support for the sector, and how its contribution is vital for economic development. Both are seen as significant opportunities to bolster the UK's film and television production capacity, potentially creating thousands of jobs and attracting substantial investment. And while Holyport Studios development has been rejected by Inspector and Secretary of State [17], the outcomes of these decisions will have notable implications for the industry and planning policies [18].

ONE FILM PRODUCTION



Data analysis [20] shows that one average tentpole film production – a film with a budget of over US \$70m – generates 2,840 tonnes of CO2 (the equivalent amount absorbed by 3,709 acres of forest in a year).

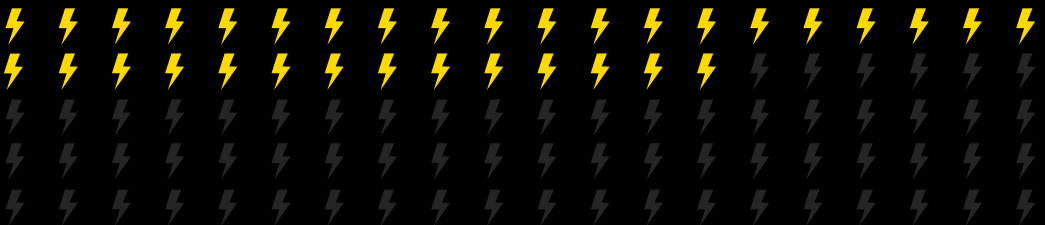
51%

of carbon emissions
come from
transportation



34%

mains electricity
and gas use



15%

Diesel generators



It's no wonder that the film and television industry is intensifying its sustainability efforts for 2025, focusing on reducing environmental impacts and promoting eco-friendly practices.

Key initiatives include:

Adoption of Albert's Sustainability Standards

- Production companies are encouraged to follow the Albert Studio Sustainability Standard, which helps companies track and reduce environmental impact.
- Albert also provides tools to measure the carbon footprint of a production, offering a framework for companies to understand and reduce their environmental footprint at every stage of production.
- The Screen New Deal is a set of initiatives aimed at decarbonising Welsh film and TV, with a focus on eliminating diesel generators by 2025.

BREEAM Certification for Production Facilities

(Building Research Establishment Environmental Assessment Method)

- BREEAM Certified studios and facilities are becoming increasingly prioritised by production companies. BREEAM focuses on energy efficiency, waste management, and the use of renewable energy sources.
- It also focuses on sustainable design in new projects to ensure that facilities meet the highest environmental standards, for energy efficient buildings, use of sustainable materials and adopting water-saving technologies.

SUSTAINABLE PRODUCTION PRACTICES

- A key focus will be on reducing transportation-related emissions, implementing local sourcing and utilising electric vehicles for transportation and logistics, in addition to using eco-friendly set materials and props.
- Production companies continue to look at how to minimise set-waste, for example the BBC's sustainability strategy focuses on recycling set materials and promoting the reuse of set pieces and props, and have been involved in projects where props, set materials, and furniture are donated to local communities or repurposed in other productions.
- Companies are investing in green filming practices such as using sustainable lighting (e.g., LED lights), reducing energy use on set, and using digital rather than physical materials



"IT'S THE PHYSICAL REALITY OF MAKING A FILM THAT CAN MAKE SOMETHING TRULY EMOTIONAL"

CHRISTOPHER NOLAN

TECHNOLOGICAL ADVANCES

By the end of 2025, artificial intelligence (AI) is poised to significantly transform the film and TV production landscape.

Key trends include:

- AI-driven editing tools are already increasing productivity by up to 50%, streamlining workflows such as footage sorting, colour correction, and sound design.[21] [22]
- AI is expected to cut overall production costs by up to 30%, automating tasks such as casting, scheduling, and CFX corrections [23]
- AI-powered techniques are used in 80% of large-scale water and fire simulations, and reducing VFX correction cycles by 30% [24]
- AI is already assisting in script analysis and predicting film success with accuracy levels as high as 73% [25]
- AI tools are shortening production timelines by 20-30% [26]

As AI continues to advance, its integration into film production is set to transform both the technical and creative sides of filmmaking. From streamlining post-production workflows to enhancing storytelling, AI will enable filmmakers to push boundaries like never before.

Prominent directors and producers stress the importance of preserving the human touch in storytelling.

Christopher Nolan has argued that "it's the physical reality of making a film that can make something truly emotional" emphasising that technology should enhance, not replace, human creativity [27]. Nolan, and other industry leaders highlight that AI should complement, not overshadow, the emotional and collaborative essence of filmmaking.

The growing demand for a skilled, diverse workforce in the UK's film and TV production industry is driving significant investments in training programmes and apprenticeship initiatives.

40%

The British Film Institute (BFI) and ScreenSkills have committed to developing a more inclusive workforce, with ScreenSkills alone reporting a 40% increase in funding for training programs since 2020. [28]

Moreover, the UK government acknowledged this need through its 2024 Creative Industries Sector Vision, committing to significant investment in talent development, particularly targeting young people and underrepresented groups.

This includes initiatives such as:

- Improving creative apprenticeships,
- Supporting T-levels, and
- Funding creative education plans to ensure a diverse and highly skilled workforce

BUSINESS SKILLS: BEYOND THE SET

While technical and creative skills are essential, the government's sector plan [29] highlights the need for broader commercial capability. Upskilling production professionals in areas such as digital marketing, IP negotiation, budgeting, and investor pitching is key to business resilience.

Industry programmes such as ScreenSkills' business modules, the Digital Catapult, and local enterprise partnerships offer pathways for building these capabilities, especially for companies outside the traditional production hubs.

These efforts are essential for driving long-term growth and increasing job opportunities, aiming for the creation of one million more jobs by 2030. [30]

In closing, these factors collectively signal a promising yet challenging environment for the UK's TV and film

PART 3: NAVIGATING THE ROAD AHEAD

As we enter 2026, the UK's production sector stands at a turning point. Shaped by technological change, audience shifts, and growing environmental demands, the rules of engagement are being rewritten. With the right investment and strategies, production companies can turn uncertainty into momentum and lead the next era of global content creation:

EMBRACE TECHNOLOGY AND INNOVATION

Leverage AI and automation and look to better understand how AI can be integrated into your workflows – whether for automating post-production purposes, enhancing visual effects, or using predictive tools for audience targeting.

Adopt sustainable practices and prepare for upcoming regulations by investing in greener suppliers and technologies, and aligning with initiatives like the Green Screen Programme (which provides fiscal incentives) or Albert.

SUPPORT AND INVEST IN TALENT DEVELOPMENT

Production companies should focus on talent development through apprenticeships, internships, and partnerships with educational institutions.

Increasing diversity in front of and behind the camera is not just a social responsibility but also a strategic advantage.

To avoid a “brain drain,” industry leaders must not only invest in talent pipelines but also ensure that existing talent feels valued and supported throughout their careers.

RETAIN SKILLED AND QUALIFIED TALENT

In addition to focusing on developing new talent, it is equally critical to retain the skilled professionals who are already integral to the UK film and TV production industry.

As the sector grows, retaining skilled talent is essential for maintaining industry standards and ensuring long-term success, especially in an environment where experienced professionals are in high demand.

STRENGTHEN COLLABORATION AND CO-PRODUCTIONS

The UK government and industry stakeholders remain committed to achieving the sector visions for 2030 [31] with the Department for Culture, Media and Sport (DMCS) and Department for Business and Trade (DBT) continuing to work closely with the sector to deliver targeted activity, including meetings with international

buyers, potential co-production partners and investors. The UK has several incentives, such as Film Tax Relief, which make it an attractive partner in co-productions. In this context, production companies would be wise to pursue strategic partnerships with international studios and build relationships with international distributors to secure wider distribution for projects.

Closer to home, production companies could form local partnerships with regional hubs, such as those in Leeds and Belfast, and align with national initiatives (including Creative Industries Clusters Programme [32], Film Tax Relief and Regional Incentives).

OWN YOUR IP: BUILDING A BUSINESS, NOT JUST A PRODUCTION

The sector plan identifies commercialising intellectual property as a major growth opportunity [31]. For independent producers, retaining rights and revenue from original content is critical. Production companies should prioritise contract terms that protect IP, consider alternative distribution models, and explore support from bodies like the UK Intellectual Property Office and Creative UK. Developing a long-term IP strategy can turn a successful project into a sustainable business asset.

NAVIGATING REGULATORY CHANGES

It's crucial for production companies to stay updated on potential changes or new financial incentives to ensure effective financial planning.

Additionally, upcoming adjustments to data protection and intellectual property laws, such as those highlighted in the Pro-innovation Regulation of Technologies Review [33] (UK government-led initiative aimed at ensuring that regulatory frameworks keep pace with technological advancements), should be closely monitored.

Stay informed of potential new initiatives and regulatory changes through several key strategies:

- Industry Bodies and Networks such as BECTU, BFI, ScreenSkills, and PACT.
- Government and Parliamentary websites, such as Department of Culture, Media and Sport, Department for Business and Trade, and Parliamentary debates and consultations on key issues.
- Consult with your legal and financial advisors, they will be aware of upcoming changes to laws and operations that could impact production operations, such as data protection, intellectual property, and environmental regulations.

- Attend industry conferences, workshops, and seminars hosted by industry leaders, government bodies, and creative organisations.
- Subscribe to trade publications and reports from organisations like Creative England or Screen International for regular updates.
- If working with consultants, ensure they are proactive in their strategies for tracking any shifts in legislation or incentives.
- Engage your suppliers, and ensure that the services, equipment and support you meet your requirements.

TIME TO GET TOUGH!

Lastly, the ongoing financial pressures within the media and production sector (compounded by global trade uncertainty and shifting market dynamics) underscore the need for robust risk management strategies.

To safeguard stability, production companies should consider diversifying revenue streams through international distribution, digital platforms, and co-branded content partnerships, as explored in this document. Considering the turbulence over the past 18 months, building greater flexibility into production timelines and budgets is essential. This agile approach will better equip companies to respond to evolving economic conditions, supply chain disruptions, and changes in audience demand.

KNOW WHERE TO LOOK: FUNDING AND FINANCE RESOURCES

- Access to capital remains one of the most significant barriers for early-stage and regional productions. Alongside the government's commitment to increased creative finance signposting, companies can take advantage of support from:
- The British Business Bank's creative scale-up initiatives
- Creative UK and ScreenSkills funding calls
- Film & TV Charity's production support
- Regional grants through devolved administrations





PREPARE FOR SUCCESS

As we move through the remainder of 2025 and into 2026, the UK's media and production sector stands at a pivotal crossroads. Technological acceleration, evolving audience behaviours, and the tightening of global trade conditions are reshaping the industry's foundations. At the same time, environmental accountability, regulatory shifts, and the decentralisation of production continue to redefine the rules of engagement.

This whitepaper has explored these dynamics in depth, from the rise of regional content hubs and the growing influence of sustainability to the critical role of international collaboration and the ongoing war for creative and technical talent. These are not just trends; they are structural shifts that will shape the sector's competitiveness for years to come.

Yet with change comes opportunity. By remaining agile, strategically diversifying revenue streams, and

embracing innovation across platforms and partnerships, production companies can build greater resilience. Those that invest in future-focused capabilities today will be best placed to capture growth tomorrow.

The outlook for the rest of 2025 and into 2026 is not without its complexities, but it is also rich with promise. With the right mindset and strategic approach, the UK production industry can turn disruption into momentum and emerge stronger, more adaptive, and more globally influential than ever before.

As Culture Secretary Lucy Frazer stated: "This funding will help create thousands of new jobs, equip young people with the skills they need for the future, and support UK content to reach global audiences." It is a timely vote of confidence in the sector's potential and a call to embrace the future with purpose.

A NOTE FROM THE AUTHOR

As someone with a personal connection to the UK's film and TV production sector, my husband works as a Rigging Gaffer in the electrical department, I have a long-standing and genuine interest in its resilience and success.

In recent times, the phrase "Survive to 2025" captured the uncertainty many in the industry felt. Yet, halfway through the year, I believe it is now time to move beyond survival and focus on the signs of recovery, innovation, and renewed purpose that are already emerging across the sector.

While challenges remain, there is a growing sense of determination within the industry, from production crews to creative leads, to shape a more adaptable and sustainable future.



I hope the insights in this paper contribute meaningfully to that momentum.

As Strategy Partner, I will continue to closely monitor the evolving landscape, as well as broader current affairs, to ensure we remain ahead of the curve. Our commitment is to provide timely insights and practical solutions that help our clients in the media and production sector navigate uncertainty, seize emerging opportunities, and adapt to their evolving needs with confidence.

Here's to ending 2025 strong, and building a future defined not by recovery alone, but by lasting, confident growth.

Hayley Smith-Pryor

Strategy Partner, Addison Lee

ABOUT THE CONTRIBUTOR

ADDISON LEE is a leading ground transportation and courier service provider, has long been a trusted partner for businesses and consumers across the UK, including within the film and TV production sector. With a strong reputation for reliability, flexibility, and exceptional customer service, Addison Lee plays a vital role in ensuring that production schedules run smoothly and efficiently.

As the entertainment industry continues to evolve, so will Addison Lee's ability to meet the unique demands of film and TV productions. Whether transporting talent, crew, equipment, or managing large-scale logistics, Addison Lee is committed to providing bespoke solutions tailored to the fast-paced and

dynamic world of production.

With a deep understanding of the industry's specific needs, Addison Lee is proud to support the success of productions, from smaller independent films to large international blockbusters.

For production companies looking to streamline their logistics, reduce risks, and enhance operational efficiency, Addison Lee offers the expertise and support e about the needed to keep projects on track.

With Addison Lee, your production's journey is in safe hands.



PRODUCTIONS

The ultimate transport solution for the UK's creative industry.

Elevate your production with Addison Lee's premium transport services, designed to keep your crew, talent, and equipment moving seamlessly. From luxury VIP rides to efficient logistics, we keep everything on schedule and in style, so you can focus on the magic:

- Keep your production on schedule with timely, safe, comfortable rides
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- Meet your green production goals with Addison Lee's growing electric fleet, supporting environmental sustainability for the screen industries
- From city streets to remote countryside, our nationwide network effortlessly manages all your location logistics
- Dedicated account management to support your key creative teams
- Discreet, luxury transport for high-profile talent - where comfort meets confidentiality
- Protect your high-value equipment between sets, studios, and post-production with dedi

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& Chauffeurs

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location, we're there
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SOURCES

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The information and data referenced in this whitepaper have been sourced from publicly available industry reports, government publications, and reputable media outlets at the time of writing. While every effort has been made to ensure accuracy, market conditions and industry developments are subject to change. Addison Lee assumes no responsibility for any errors, omissions, or updates that may occur after publication.

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