

pact.



Manifesto For Growth 2024.

Key proposals for the UK's independent production sector.

pact.

The Producers Alliance for Cinema and Television (Pact) is the UK screen sector trade body representing and supporting independent production companies.

Our members make some of the world's most critically acclaimed and popular TV programmes, films, digital and interactive content.

Introduction.

I've worked in the independent production sector for over 20 years and in that time have seen it grow exponentially.

As Pact Chair, I'm proud to represent a creatively dynamic and commercially successful group of businesses worth over £3bn, who employ thousands of people across the UK. We have over 700 company members and our goal at Pact is to ensure they can thrive in a production ecology that is diverse and incentivises innovation.

The production sector is a vital part of the UK's wider creative industries as a provider of jobs and economic growth. Our members' success not only impacts the immediate production community but has a ripple effect downstream to a multitude of local businesses, including post-production houses, visual effects companies, hotels, locations and transport services. All of which rely on the success of the TV and film production sector.

A diverse talent pool is also important for maintaining and growing our success, both creatively and economically. True inclusion means giving companies the incentives and opportunities to grow and develop, whoever they are and wherever they are in the UK. As a Glasgow-based business owner myself, I know only too well how important this is.

Pact is at the forefront of inclusion and we encourage our members to embed a culture of inclusivity through our involvement in diversity schemes and having a dedicated inclusion lead. We see this as a key part of what we stand for as an organisation and as a sector.

The next 12 months will be crucial for us. With a new Government and the implementation of the Media Act, as well as a tough economic climate to navigate, it is essential that we continue to work closely with policy makers to ensure that British independent TV, film and digital content producers retain their position as world leaders in the provision of high quality original output. The value of and demand for UK content, not only in the UK itself but around the world, means we continue to provide jobs and opportunities for British people.

Without a thriving UK independent production sector, we simply wouldn't produce the diverse range of stories enjoyed by audiences of all ages on screens of all sizes, which not only educate and entertain but help us to understand who we are in an ever-changing and increasingly complex world.



Jane Muirhead
*Chair, Pact Council
MD, Raise the Roof
Productions*

“The production sector is a vital part of the UK's creative industries as a provider of jobs and economic growth.”

Who We Are.

Pact represents over 700 independent producers and distributors situated across the UK ranging from one-person start-ups right through to international super indies. Eighty-four per cent of them are SMEs.

Our members make television programmes, films, online content, commercials, branded content, music videos, charity films and promos, amongst other things. They are exceptionally creative and operate in a competitive, global market.

Since 1991, our work has helped develop the UK independent production sector from a cottage industry into a creative and commercial success story, worth over £3.9bn.*

Our members are responsible for some of the world's most critically acclaimed and popular TV programmes and films, such as *The Traitors*, *Gogglebox*, *Happy Valley*, *I Am Ruth* and the 2024 BAFTA and Oscar-winning film, *Poor Things*.

Our mission is to help our members grow their businesses domestically and internationally. We do this by offering them the tools and support they need, as well as working to ensure the best possible economic, regulatory and legislative environment for them to do business in.

Key Proposals.

This manifesto outlines six key areas of focus for policy makers that can help to support our sector.

The following pages provide an overview of those key proposals, as well as further detail about each one, with supporting data and case studies from Pact members.

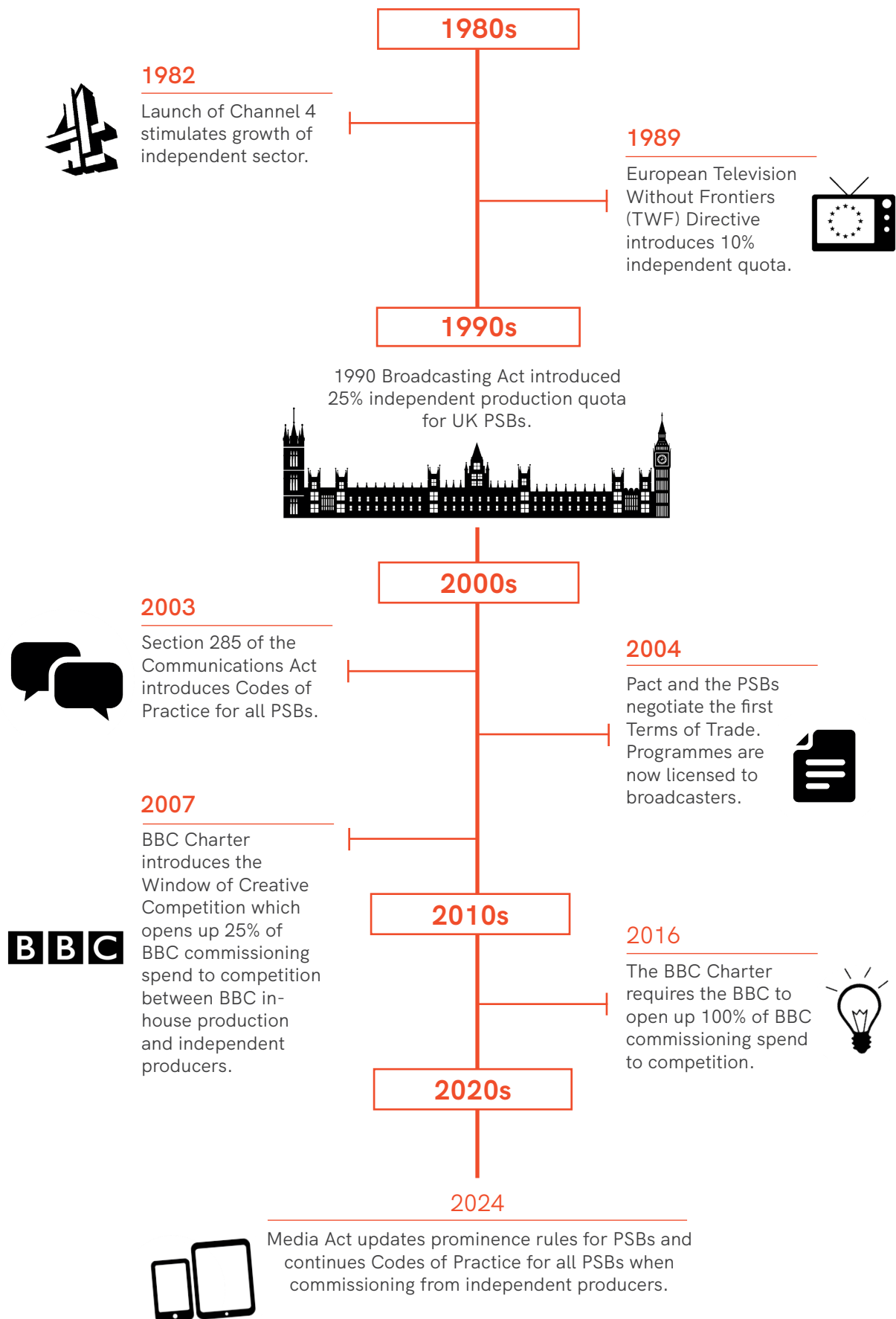
We hope that you find this informative and are available to answer any queries you may have about any of the proposals raised.



*Pact Census,
Oliver & Ohlbaum Associates, 2023

The Traitors, made by Pact member
Studio Lambert for the BBC.

A History of Interventions Impacting UK Independent Production.



Key Proposals

Overview.

1.

A Mixed Production Ecology To Maximise Growth.

- A strong Public Service Broadcasting (PSB) system that continues to incentivise a competitive marketplace which ensures only the best content is made available to audiences is vital.
- A properly funded BBC with thorough scrutiny applied to how the BBC spends this funding and how its commercial activities will continue to act fairly without distorting or damaging the wider market.
- Increased Channel 4 commitments for nations and regions programming to be written into their licence, signalling to the market a confidence in the supply in programme making.

2.

Develop a Diverse Talent Pool.

- The Apprenticeship Levy to be reformed to ensure that the money that is being collected is appropriately targeted and takes into account the project-based nature of the UK production sector.
- The Government to continue working with industry to develop the best solutions for skills development in the UK production sector.

3.

Global Growth in International Markets.

- The next Government should continue to pursue co-production treaties with other territories, as these treaties are easy to utilise and help independent producers secure commissions globally.
- Commit to long-term support for the film and TV sector to create more value in international markets through well-planned and executed trade missions to key territories and events.
- Urgent consideration and consultation on a new successor programme to the Trade Access Programme (TAP) so that it can deliver opportunities to SMEs in overseas markets.
- Maximum access to international markets to secure new opportunities.

4.

Future Innovation And IP Success.

- The legal framework for AI-related copyright infringement needs to be clear and unambiguously in line with the UK's copyright regime.
- The next Government must include transparency provisions encouraging AI providers to keep records of the creative works used and the respective licences.

5.

Globally Competitive Tax Incentives That Support British Talent.

- Maintain the successful creative sector tax reliefs, and ensure they remain globally competitive.
- Reform the Research and Development Tax Relief to ensure it is fit for use by those in the creative industries.

6.

Targeted Public Funding to Grow Audiovisual Economies Out Of London.

- Better coordination of funding between central Government, creative agencies and Local Authorities by involving trade bodies at an early stage of developing a funding stream.
- Government to consult trade bodies like Pact to help better devise Government interventions.
- Channel 4 commitments for nations and regions programming to be written into their licence to further grow and develop production outside of London.

1.

A Mixed Production Ecology To Maximise Growth.

The UK's creative economy is a global success story and the production sector has been key to that success. UK-created content is in high demand, and our mixed broadcasting ecology is internationally lauded.

The system fosters entrepreneurialism and enables anyone to monetise their own creativity. Barriers to entry in the independent sector are incredibly low: with one good idea, even the smallest company can create a hit that sells across the world.

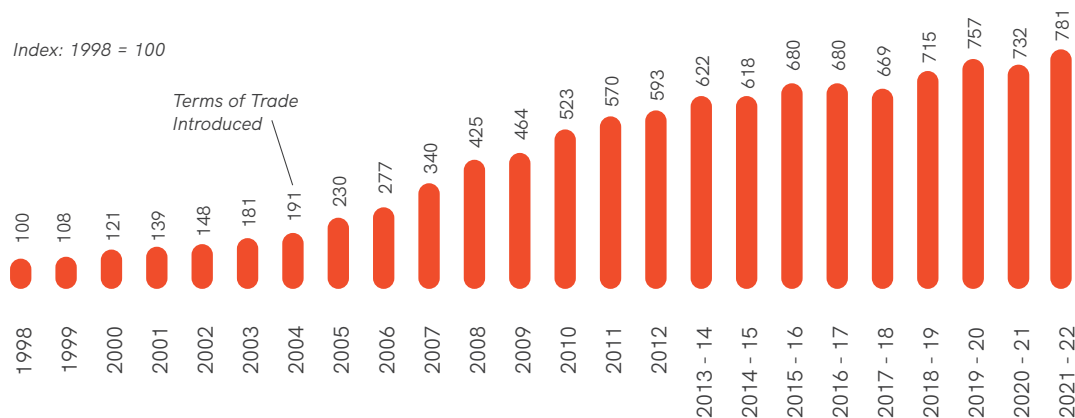
This has created a flourishing, thriving British industry comprised of hundreds of small, innovative businesses. Eighty-four per cent of independent producers are SMEs – with the greatest growth since 2013 coming from mid-sized companies demonstrating the continued dynamism of the sector.***

The sector has developed from a cottage sized industry of under £850m in 2003 where producers operated on a work-for-hire basis, to a very successful sector worth just under £4bn in 2023.* Overall, the creative industries contributed £115.9bn to the UK economy in 2019.

The UK's regulatory regime for PSBs and producers creates economic incentives for SMEs in the independent production sector to expand and develop, in turn creating more jobs and growth for the UK economy. These jobs are also at low risk of being automated in the future. A NESTA report found that only 15% of UK creative industry jobs were at high risk of being automated compared to 32% of non-creative industries.

Our well-balanced broadcasting ecology also benefits the UK public, because it ensures a high level of competition for commissions which in turn creates top quality programmes and films for audiences to enjoy.

Income growth in UK TV Rights & Production Exports.***



* Pact Census, Oliver & Ohlbaum Associates, 2023

** Creativity vs Robots: the Creative Economy and Future of Employment, NESTA, 2015

*** Celebrating 20 years of Terms of Trade, Oliver & Ohlbaum Associates, 2024

Key Proposals.

- A strong Public Service Broadcasting (PSB) system that continues to incentivise a competitive marketplace which ensures only the best content is made available to audiences is vital.
- A properly funded BBC with thorough scrutiny applied to how the BBC spends this funding and how its commercial activities will continue to act fairly without distorting or damaging the wider market.
- Increased Channel 4 commitments for nations and regions programming to be written into their licence, signalling to the market a confidence in the supply.

84%

Of UK independent
producers are SMEs.*

£3bn

Value of UK independent
production sector in 2023.*

Case Study.

Cassie Gilmour – Access Plus, A Briggs Company
Constituency: North Ayrshire

How do you work with the TV and film sector?

We provide powered access equipment such as scissor lifts and cherry pickers for working at height. Our sister company also provides health and safety training to operatives on site.

How long have you been working with productions?

We have worked with various production companies since around 2016.

How important is it to your business?

The industry is important to us as they use our services regularly whether it be for powered access or health and safety training - this increases our revenue and utilisation.

What's the best thing about working with the TV and film industry?

I think for us, the best part is knowing when a show or film has been produced, that we have helped by supplying the equipment to allow filming to take place.



2.

Develop a Diverse Talent Pool.

Pact is committed to a diverse and highly skilled production workforce at all levels across the UK.

The rapid growth of the sector in recent years (especially post pandemic) put huge demand on the UK production community and revealed the extent - and consequences - of skills shortages. This resulted in a disconnect between the production workforce and the industry demand for particular skills. In the face of a particularly challenging economic environment, the industry is having to reassess how best to sustainably maintain the workforce now and in years to come.

Pact is heavily involved in ensuring the skills gap is bridged sustainably for the future. This includes being part of the Screen Sector Skills Taskforce, an industry-wide group tackling the systemic challenges to skills development in the industry, and running an entry level diversity scheme in London and Scotland. The Pact Indie Scheme provides a supported entry route for new talent from under-represented groups, including women, BAME, LGBTQ+ and people living with disabilities. Each trainee undergoes a six-month paid placement at an independent production company, working in entry level roles from researcher to assistant producer. We have also developed an online tool to help students, freelancers and junior staff of indies across the UK grow their skills and knowledge of TV production.

It is clear that the Apprenticeship Levy in its current form does not work for the creative industries and consequently will not improve the diversity of the industry as quickly as it could. That is why we also support the Screen Sector Skills Taskforce and the industry-led skills body, ScreenSkills' work in improving the operation of the Apprenticeship Levy. This includes proposals for it to be used to cover the additional costs of operating flexible apprenticeship models within the screen sector.

To ensure the talent pool is diverse, we also work in collaboration with the broadcasters and our members to embed inclusive working practices across our industry. The BBC, Channel 4 and Sky have set targets for on- and off-screen diversity for all commissions with a focus on gender, ethnicity, socio economic diversity and disability. Film producers must adhere to the British Film Institute's three tick system to promote diversity if they access any Lottery funding. Pact has been instrumental in setting up Diamond, an industry-wide diversity monitoring system. No other broadcasting industry in the world has developed a cross-industry approach to collecting, publishing and analysing such robust diversity data.

Having a diverse talent pool not only benefits our businesses but also the audiences we serve, helping to ensure that the content we produce connects with the people and communities who watch it.

**Number of full time equivalent jobs that
the screen sector value chain generates.***

203,660.

The Pact
Indie Scheme.

10
Years
running.

1.9m
Total investment
from indies.

133
Participants
to date.

77%
Industry
retention rate.

Key

Proposals.

- The Apprenticeship Levy to be reformed to ensure that the money that is being collected is appropriately targeted and takes into account the project-based nature of the UK production sector.
- The Government to continue working with industry to develop the best solutions for skills development in the UK production sector.

Case Study.

Dean Webster – Development Executive, Ten66 Television
Constituency: Bermondsey and Old Southwark

I was one of the ten trainees on Pact's first Indie Diversity Training Scheme in 2013. As part of the scheme I was placed in Shine Group's head office working across multiple departments including acquisitions and international formats.

I found the Pact scheme a great opportunity to get my foot in the door and learn more about the television industry. There are so many different paths in television and the Pact scheme gave me the opportunity to try out a few and learn about the different areas of television, like production, sales, marketing and international formats.

You get out what you put in so if you're eager to learn and do well, you'll find people willing to take the time to help and train you. In an industry where networking is crucial to success, this helped me find work after the scheme ended and move up later on in my career.

I want to continue creating and producing large scale factual entertainment and reality formats and, eventually, move up to Managing Director of a production company or Commissioning Editor at a broadcaster or streamer.



Freelancer Experience.

Tom Adams – Executive Producer
Freelance for over 25 years,
14 years as an Executive Producer.
Constituency: Sevenoaks

"While there are challenges to a freelance life there are also great advantages. Working project by project allows a continual change of workplace and work colleagues, which exposes you to new talent and new ways of working.

There is flexibility, giving the potential to work on more than one project at a time, and the ideal scenario is to use freelance working to pick and choose the projects that interest you."



3.

Global Growth in International Markets.

British films and television programmes are watched and admired around the world.

UK TV programmes and formats are sold globally to hundreds of territories, at a scale topped only by the US. *Gogglebox* alone has been exported to more than 30 different territories. In 2023, a Pact report showed that UK TV exports were worth almost £1.853bn, with sales of finished TV the largest contributor of all export revenue (£1.108bn).*

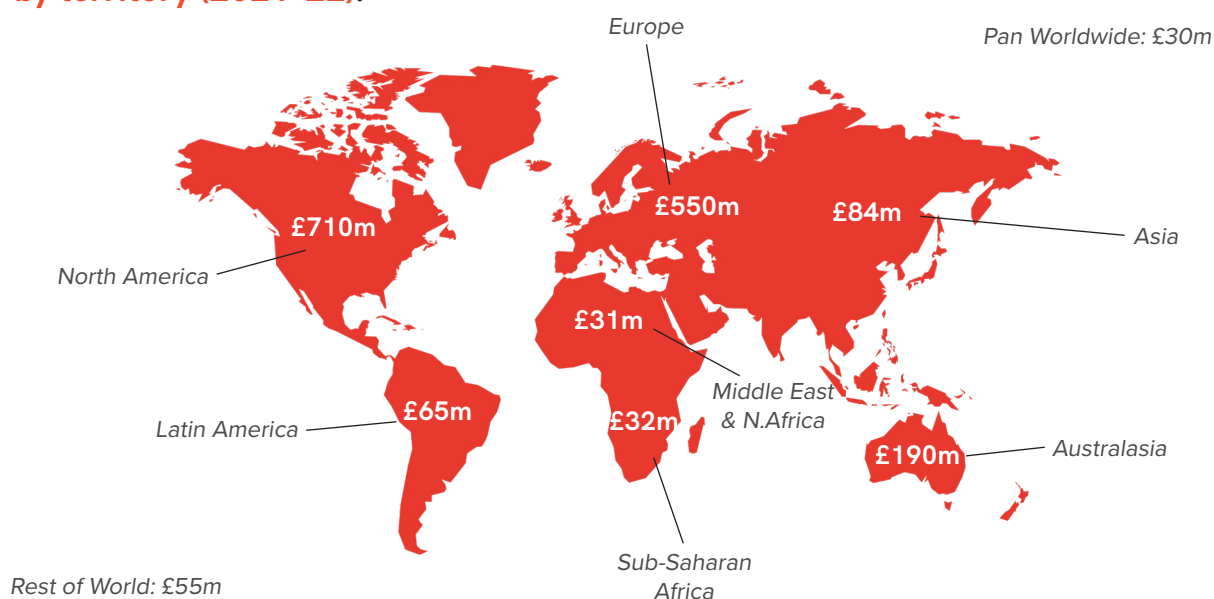
Pact has several decades of experience in supporting members to export more of their content and sell their ideas and skills into the international marketplace. We know that long term growth and diversification for small businesses can only be achieved by fully accessing the increasing opportunities in global TV markets.

Government can help facilitate and make the environment right for exporting by signing up to treaties that encourage international collaboration and ensuring that any public funding is targeted and avoids duplication. Government's role should be to ensure all policies help businesses get access to global markets easily using trade bodies like Pact, who have built up expertise over many decades in the industry.

It can take time and investment to build the necessary relationships for commissions. Government needs to recognise that exporting UK content and securing commissions in different territories is not one size fits all and the needs of each individual business will vary depending on sector.

Promoting UK content to international markets is good for the UK public because it increases the UK's soft power. This can lead to more individuals and businesses seeing the UK as an attractive destination to visit and invest in, which in turn increases employment opportunities within the UK.

UK TV exports by territory (2021-22).*



Key Proposals.

- The next Government should continue to pursue co-production treaties with other territories, as these treaties are easy to utilise and help independent producers secure commissions globally.
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- Maximum access to international markets to secure new opportunities.

Case Study. **Carl Hall** – Managing Director at West One International Constituency: Chesham and Amersham

Tell us a bit about who you are and how you got into the industry.

I have spent 41 years in the TV industry from trainee cameraman for Anglia TV, Technical manager at Henson's, to CEO/owner of the Parthenon Media Group with its eventual sale to Sky TV to create Sky Vision - Sky's distribution arm. From there I started my own production company, Warehouse 51 Productions (Area 51: The CIA files for Disney/Nat Geo, Wild Costa Rica for Discovery) and my own distribution Company West One International (Earth Emergency with Richard Gere for PBS, Viking Quest America for History UK).

What is your favourite market?

Sunnyside is my favourite market as you have time to do a proper pitch of a programme and to link with all the European buyers face to face in a relaxed atmosphere.

What was your biggest sale?

My biggest single sale was £600,000 for a one-hour 3D Polar Bear film to home video (when 3D was at its peak).

What is the sale you're most proud of?

The recent sale to Channel 5 of Riverwoods, made by the charity SCOTLAND: The Big Picture, about the need to reintroduce trees to protect and create cover for the Scottish Salmon run. It seems to have raised awareness and land owners are actually planting trees as a result of the film!

What was your hardest sale?

Wild Russia, an eight-part series, to Animal Planet who initially said that Americans didn't have an interest in Russia. I rewrote the proposal and promo adding references like 'Siberia - a third bigger than the United States.' They bought the series and it was a great success!



4.

Future Innovation And IP Success.

Technology is impacting the way we create and exploit intellectual property and that is only set to continue. The UK has a history of working with Europe and other countries to ensure our copyright regime allows creators to exploit their rights and reap the benefits of their artistic works.

The future of intellectual property presents both challenges and opportunities and Pact wants to ensure the UK production sector benefits from any new developments.

Artificial Intelligence, for example, promises considerable benefits for our sector both creatively and economically. But this new technology also presents challenges, such as how to ensure the rightsholders of any data or content are rightly remunerated for their use.

Pact is working with the British Copyright Council and others across the industry to try to best understand how we can benefit from this technology whilst also identifying the risks.

As part of this work, we have developed AI principles to help guide our members. These principles are dynamic and we will iterate them as new developments arise and in conjunction with feedback from independent producers and other colleagues across the industry.

Pact AI Principles.

1. Respecting Copyright.

Pact considers that copyright works should be protected from being used illegally in contravention of UK copyright law.

2. Valuing Human Creativity.

Pact believes in the value of human creativity and artistic talent in the production process. This cannot be replaced by AI.

3. Responsibility & Accountability.

Pact considers that there should be transparency over the use of generative AI tools within the production process. Pact members will continue to take responsibility for all content that they produce.

4. Diversity & Inclusion.

Pact supports minimising and mitigating bias in AI models, and encourages members to use generative AI tools that have been developed to express diversity.

5. Data Privacy.

Pact agrees that privacy must be protected and promoted throughout the AI lifecycle and production process.

Key

Proposals.

- The legal framework for AI-related copyright infringement needs to be clear and unambiguously in line with the UK's copyright regime.
- The next Government must include transparency provisions encouraging AI providers to keep records of the creative works used and the respective licences.

Case

Study.

Deepfake Neighbour

Made by Tiger Aspect

Deep Fake Neighbour Wars, produced by Tiger Aspect for ITV, is a comedy impression show and one of the first uses of deep fake technology in a long form narrative series. The show used AI technology to turn impressionists into celebrities, placing them in unlikely everyday comical scenarios far removed from their celebrity lives. To ensure the character render was convincing, extra attention had to be paid whilst filming as the technology would not be as effective if the actor was filmed from certain angles.

The show had robust compliance processes and made it very clear to viewers that the real celebrities were being played by actors and had nothing to do with the show - with clear wording in the opening of each episode and watermarking throughout. At the end of each episode the faces of the real impressionists are revealed, waving to the audience.



Pact CEO, John McVay OBE speaking at the Pact Beyond the Box AI Summit (2023)



5.

Globally Competitive Tax Incentives That Support British Talent.

The Creative Tax Reliefs have been an unprecedented success for the film and TV sector within the UK.

In 2019, screen sector production and development supported by the tax reliefs generated a total of 203,660 full-time equivalent jobs, an increase of 20.3% on 2017.*

The reliefs also demonstrate a good return on investment for HMT and the overall economy. The BFI's most recent analysis showed returns on investment for each £1 of tax relief of £8.30 for film, £6.44 for High-end TV, £4.53 for animation and £3.20 for children's content.*

The tax reliefs have been an incredible success story since their initial introduction via the Film Tax relief (FTR) in 2007. The FTR was developed in consultation with the sector and this engagement helped to ensure that any arising issues or difficulties were worked out prior to its introduction. Following the success of this intervention, the Government introduced reliefs for High End TV (HETR), Animation (ATR) and Children's Live Action programming (CTR). The reliefs were introduced by the Government to help address a specific market failure in their respective sub-sectors, encourage production that would not have happened and stimulate investment into the UK. The BFI recently estimated that the spillover effects of the creative tax reliefs, which also include other tax reliefs for VFX and the gaming industry, delivered £13.48 billion in gross value added (GVA) for the UK economy.*

Despite the success of the tax reliefs, there continues to be a market failure within children's programming. Kids programming quotas were removed for commercial Public Service Broadcasters in 2003. That, combined with the ban on advertising foods that are high in fat, sugar and salt to children also in the early 2000s, led to a steady decline in investment from the commercial broadcasters. This decline led to the Government introducing a tax relief for children's live action programming in 2015.

The tax reliefs have played a vital role in stimulating investment into the children's sector and helping producers close financing. However, Pact continues to be concerned about the declining level of investment in UK originated children's programming. Without further intervention, the genre will likely continue to decline even further.

The UK production sector is highly competitive, and producers invest a significant amount of their revenue and time into research and development (R&D). Unlike other sectors, businesses in the creative industries are not able to utilise the R&D Tax Relief to help fund their investment into R&D. A broader definition of R&D to include arts, culture, humanities and social sciences would allow producers to claim against these costs and aid the future growth of a culturally and economically important sector.

Key

Proposals.

- Maintain the successful creative sector tax reliefs, and ensure they remain globally competitive.
- Reform the Research and Development Tax Relief to ensure it is fit for use by those in the creative industries.

Each £1 of Tax Relief

Returns on Investment...

£8.30

Film



£6.44

High-End TV



£4.53

Animation



£3.20

Children's TV



*Slow Horses, made by Pact members
60Forty Films & See-Saw Films for Apple TV.*

6.

Targeted Public Funding to Grow Audiovisual Economies Out Of London.

The economic success of independent producers is benefitting local economies across the UK. Recent research commissioned by Pact found that productions in the nations and regions made up 54% of total external PSB spending, and TV production outside of London has been increasing year on year for the last five years.

Out of London employment within the indie sector has increased by 26% since 2016, meaning more jobs and growth across greater areas of the UK. When independent production companies go into production, the wider local economy gains because they use a range of other services including catering, transport, accommodation and post production houses. These other businesses are dependent on a buoyant, healthy independent production sector and benefit from its success. Beyond this, many production companies are also setting up subsidiaries or even their main base of employment outside of London.

To encourage more companies to set up businesses in the nations and regions, the Government can provide incentives. Specific grant funding or tax reliefs to help small businesses can enable the smoother process of back office functions to allow for creative endeavours to be realised. This is particularly relevant to those in the nations and regions who often need to work harder to have their ideas heard by a London centric commissioning culture.

Pact has identified funding that is available to companies by joining up Local Authority funding, creative agency funding and central Government funds. This helps our members to navigate a complicated area and make the most of existing Government funding to encourage growth. Linking these pieces of funding can be difficult and often objectives differ for their ultimate use.

Support from Public Service Broadcasters, screen agencies and Local Authorities via development and production funding and business support has played an important role in helping businesses grow and secure commissions. However, not all broadcasters, screen agencies and Local Authorities offer the same level of support. A more joined up approach would help to ensure production companies across the various nations and regions receive similar levels of support and opportunities. Public interventions through broadcasting legislation can also help incentivise independent producers outside of London. For example, specific nations and regions quotas for Public Service Broadcasters like the BBC and Channel 4.

The UK public can benefit from better targeted funding from Government and public bodies for UK independent production companies because ultimately it can help the growth and development of SMEs, who in turn can create jobs and opportunities for people across the UK.



Key

Proposals.

- Better coordination of funding between central Government, public service broadcasters, creative agencies and Local Authorities by involving trade bodies at an early stage of developing a funding stream.
- Government to consult trade bodies like Pact to help better devise Government interventions.
- Channel 4 commitments for nations and regions programming to be written into their licence to further grow and develop production outside of London.

Case Study.

Matt Richards – Managing Director, Air TV
Constituency: Selby

Working in TV production is a continually exciting and creative place to be and we are passionate about opening that up to as many people as possible. From growing up in Sheffield and being the first member of my family to work in the creative industries, we are hugely proud of the company we have built.

Air TV's programmes cover everything from emergency NHS medics working on the Yorkshire Air Ambulance in Helicopter ER, to classic car enthusiasts buying rundown motors in Bangers & Cash. Celebrating the best of human nature, passion and emotion is at the heart of all of our shows.

We are proudly based in Yorkshire but have a global outlook and our shows are on air around the world.

Air TV is growing year on year and we aim to continue to build our team of talented programme makers delivering entertaining and sustainable programmes for broadcasters both in the UK and internationally.



54%•

Nations & Regions productions as a proportion
of total external spend by the PSBs.*

Targeted Public Funding to Grow **Audiovisual Economies Out Of London.**

Since
2016.

116%

Increase in primary commission
spend in the Nations and Regions.*

13%

Increase in the Nations & Regions' share
of total UK primary commissioning spend.*



*Waterloo Road, made by Pact member
Rope Ladder for BBC (North West)*



Case Study. **Lou Tonner** – Co-Founder / COO, Wander Films
Constituency: Middlesbrough and Thornaby East

Tell us a bit about yourself. How did you get into the industry?

Wander is an award winning content marketing agency and TV production company creating exciting factual entertainment and digital content. The team of 20 develops and produces bold documentaries and formats and creates GFX (Graphics Effects) and VFX (Visual Effects) for TV. The agency is a video first marketing agency creating next level visual content for brands to Beat the Scroll® online. Clover (co-founder/CEO) was listed in Forbes 30 Under 30 and Wander was selected for the BBC Small Indie Fund in 2024.

What are you most proud of achieving in the last two years?

We're super proud to have won our first TV commissions at the start of 2024. One is a 30-minute documentary for BBC One and the other is three films for BBC Morning Live. We've also received paid development with Channel 4 Digital and created GFX for a documentary produced by another production company. We've managed to achieve this despite not coming from a TV background. We are also proud to have been selected for the BBC Small Indie Fund this year and we can't wait to share more exciting news soon!

What are your hopes for the future of the company?

We plan to continue growing in TV and film, continuing to develop our team, securing a returnable format and exploring scripted!

How has Pact helped your business?

Wander was part of Pact Future30 and FutureNorth East, two-year programmes to help emerging indies grow their businesses. With this came free Pact membership and other benefits such as networking, meeting commissioners and events.

Pact's legal team has helped us with contracts and others have always been there to offer advice and guidance. Wander were also commissioned to create the Pact MADE series, 14 short online films celebrating some of the UK's most successful indies.



First Dates, made by Pact member Twenty Twenty for Channel 4



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