

## **BAPLA Response to Government's Export Strategy: DIT Consultation**

### **About BAPLA**

BAPLA members make a significant contribution to the UK economy through image licensing. Founded in 1975, [BAPLA](#) is the UK trade association for picture libraries and agencies representing members of a unique area of the creative industry. We have a broad and diverse membership of image-makers and purveyors, from sole traders to major news, stock and production agencies, archives and cultural heritage institutions, as well as a significant number of SMEs.

Our members are the main source of licensed images you see every day in print and digital media, and as such have contributed to the UK economy for over 40 years, furnishing organisations across all forms of publishing, news, advertising & marketing, retail, science & medicine, and public bodies, with content sourced internationally.

The UK is the world's second largest image licensing market<sup>1</sup>, and UK picture libraries and agencies manage the interests of over 120,000 rights holders. Our members make a valuable contribution to the UK economy and to its exports, we export globally in a market that is forecast to grow by 8% over 3 years, projecting to reach £3.21B (\$4.46B) by 2021<sup>2</sup>.

Our industry specialises in recognising the marketplace value of images, and is a vital economic link for many professional image-makers who derive income and reinvest in their creativity. Innovation in technology has been the key driving force behind our ability to create and maintain a strong global image industry.

Photography is measured as part of a broader sector which adds £7B to the UK economy each year - Film/TV/video/radio/ photography + visual arts /performing/music = £6,987 (£m)<sup>3</sup>.

### **BAPLA responses to the following questions**

1. How should government differentiate its support for different sizes of firm?

The creative industry has a high degree of small to medium sized businesses with increasing potential, this is mirrored within the Image Sector via picture libraries and agencies. As such our members require far more recognition and practical support than is currently on offer. There is a sense that there is tendency to provide more support to certain sectors, or large organisations, who can offer headline grabbing news, rather than providing multilateral support that includes bespoke industries with growth potential such as ours. It's crucial that support is distributed across all trade sectors particularly those that have a higher concentration of SMEs, we believe there should be greater concentration on smaller companies with the biggest potential for growth. With the explosion of interest in online content, particularly with images, we need far better understanding and support from DIT to reach new potential markets.

*"For a small company such as ours, support for attending trade events in USA and EU would be helpful. Small firms need simple, practical support and reduced administration."*

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<sup>1</sup> Source: CEPIC Report 2012 - [http://www.stockimagemarket.uni-hd.de/downloads/GSIM\\_Survey\\_2012\\_Part\\_III.pdf](http://www.stockimagemarket.uni-hd.de/downloads/GSIM_Survey_2012_Part_III.pdf)

<sup>2</sup> Source: Technavio, 2017 <https://www.technavio.com/report/global-general-retail-goods-and-services-global-still-images-market-2017-2021>

<sup>3</sup> Source: CEPR 2018 <https://files.acrobat.com/a/preview/940e3529-f1ee-4932-ac0f-69c732ae1e8b>

## 2. How should government prioritise its support across different business sectors and overseas markets?

According to the Creative Industries Federation, the creative sector is worth £92bn to the UK economy and responsible for 1 in 11 jobs across the UK, 'we are underestimating the true value of the creative industry'<sup>4</sup>. The UK image industry is the second largest global market in the world, with the global Image Sector expected to grow by 8% by 2021, projecting to reach £3.21B (\$4.46B). There is an increasing reliance on images for digital marketing & online retailing, as visual content plays a key role in increasing brand awareness, accelerating brand growth, and creating differentiation in an increasingly crowded online marketplace. However, a significant barrier to industry growth is copyright regimes overseas, and dealing with enforcement issues such as online infringement. The UK Government needs to recognise the importance both IP and copyright play in an ever increasing 'knowledge economy'.

The Asia-Pacific (APAC) market for the Image Sector is expected to grow exponentially during the period 2017-2021 due to rapidly growing internet use in these areas. Aside from continuing trade agreements with European countries (which accounts for 40% of income), China appears highest on the list of countries where image libraries and agencies see potential growth, followed by Japan in third place. However, copyright infringements can be particularly high in the APAC region due to a lack of enforcement policies, which also prohibit growth potential. The copyright volatility in this region and in others (such as Australasia and South America) results in high levels of missed revenue opportunities. Image piracy is a potential barrier to market growth for image rights holders looking to expand their businesses beyond Europe. It is therefore essential to receive vital trade support to expand in these countries in order to tap into the market potential. The US is still seen as a viable market, but over the years, since a 'fair use' doctrine and 'safe harbour' provisions were introduced, the market, whilst potentially being one of the largest global trade markets, it is a double-edged sword for many in the Image Sector.

New technologies could also play a role here. So rather than silo the tech industry and creative industry and deal with them separately, DIT should be looking at ways to bring both together to develop new opportunities in order to generate revenue right across the value chain, giving the right level of support to smaller organisations.

## 3. How should government change its mix of products and services to help businesses achieve a sustained increase in exports?

Whilst the look of the DIT website "GREAT" is appealing, the navigation is confusing and offers very little to the Image Sector in terms of advice and opportunities. There needs to be great capacity to link sectors laterally - such as technology and creativity. In addition, there should be clearer practical support for SMEs who may not have the budget to undertake market research and travel to overseas events.

Practical and financial support to attend relevant overseas trade events would be helpful, plus facilitating contact with specifically targeted clients in specific overseas markets that our members wish to develop.

## 4. How should government work with regional and private sector export support to deliver a more joined-up offer for businesses?

Trade organisations do a good job in joining-up regional and private sector businesses; however, they are not always able to provide additional support for members to reach international markets, therefore organisations such as BAPLA need to be given more support, including funding, to take delegations to new markets.

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<sup>4</sup> Source: <https://www.creativeindustriesfederation.com/sites/default/files/2018-03/Federation%20Cebr%20CIC%20The%20true%20value%20of%20creative%20industries%20digital%20exports.pdf>

DIT offers regional workshops on practical issues relating to sales and marketing, but again these are not signposted clearly nor are they provided as a monthly digital newsletter, which would be far more practical to disseminate.

5. What should government do to increase capacity and capability in the private sector, particularly at a UK regional level?

As the Image Sector's growth has been with digital products, regional capability is less of an issue. The larger concern is trying to reach overseas markets and therefore where we need greater support. That being said, if the DIT could organise and host more cross-sector national events - such as creative and tech, creative and retail/brands, then that would certainly encourage further trade opportunities.

Support across Government departments on issues such as tackling the proliferation of online image theft and copyright infringement would be most helpful, so DIT working with the IPO and DCMS<sup>5</sup>.

6. How should government charge for the services it offers?

If there were any charges they would need to be proportionate on the size and generated profit of the company. It would be welcomed if, for small firms with 1-3 people, such services could be offered free of charge if possible.

7. Do you have any other comments that you would like DIT to take into account?

We would recommend the following additions:

Regular inclusive stakeholder dialogue, particularly with those from the Image Sector; to provide clear accessible DIT 'market access' support for the Image Sector; to promote artistic works/images output as part of the UK IP portfolio; to provide inclusive schemes across the creative industry, such as the Image Sector. In addition, to recognise the importance of copyright & related rights in images as part of the 'knowledge economy'. Finally, enforce regulations, such as copyright and related rights, as well as competition rights, that support the image industry's global commercial licensing abilities.

If image rights holders are to share in any of the economic value that such works contribute, then an inclusive international trade plan encompassing the creative sector and a strong IP policy is key, particularly when striking new tariff-free trade deals. Now is a golden opportunity for the image sector to remain one of the UK's great exports.

BAPLA also hopes to see internationally a closer proximity to our own IP regime to increase confidence and investment, and strengthen our ability to innovate on an international level in order to maintain our global position.

Isabelle Doran  
Chairperson  
On behalf of BAPLA

<http://www.bapla.org.uk>

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<sup>5</sup> Alliance for IP and Creative Industries Federation worked with IPO, DCMS and DIT to provide an event "From Spark to Market - Maximising your creativity through IP" - [https://federation.force.com/CPBase\\_event\\_detail?id=a1U41000002GxKPEA0](https://federation.force.com/CPBase_event_detail?id=a1U41000002GxKPEA0)