

(US\$127.3 million) each bringing the total value of independent programming to between £320 and £350 million a year (US\$565.8 million and US\$618.8 million).<sup>23</sup>

From 1993, both the BBC and ITV will have to commission 25 per cent of their output from independent producers. This measure was introduced in the 1990 Broadcasting Act to provide independent producers with greater access to the existing broadcast outlets. This will mean that both the BBC and ITV will have to commission 1,400 hours of programming from European independents who are not owned or controlled by broadcasters. In the year ending June 1992 ITV commissioned 654.8 hours while the BBC commissioned 861.6 hours. Much of the increase in ITV's independent commissions will come from the new publisher/contractors Carlton and Meridian. For example, Carlton has already invested £35 million (US\$55.2 million) in commissions from independents.

However, with the BBC cutting costs, programming budgets frozen at Channel 4, and the ITV companies unable to commit themselves while confusion surrounded the new central schedule, independent producers are finding times hard.

Light entertainment and quiz shows remain the largest programming sector for independents, accounting for 443 hours on ITV and BBC, compared with 244 hours of sport, 256 hours of children's, 121 hours of drama, and 129 hours of documentaries.

The majority of producers are small companies which produce only one series or programme at a time. However a number of major independents have emerged, including Mentorn, Portman, SelecTV, Broadcast Communications and Cinema Verity. These were joined by Thames Television on 1 January 1993 when it handed over its ITV franchise to Carlton.

There are currently around 800 active production companies in the UK, of which 45 achieve annual gross revenue of over \$1.8 million. This is a far higher number than in other European countries, although the share of annual broadcasts is comparable at 12 per cent.

With limited programming resources at all four major broadcasters there is an increasing trend towards concentration and consolidation among the independent sector. One recent example is Portman Entertainment, one of the UK's largest programme producers, which signed a deal with Primetime/RPTA, that will see the latter's sales arm handling international distribution of Portman's catalogue.

As in the production sector there is an increasing trend towards consolidation among UK distributors. Victor Glynn of Portman believes that eventually four major distributors will emerge. Three of these he expects to be broadcaster-owned with the major ITV international distribution arms, such as Central Television Enterprises (CTE) and the recently merged Granada/LWT International, as strong candidates.

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<sup>23</sup> Source: Broadcast