The University of Nottingham

'Studios And Spaces Of Production In The Digital Era: Global Challenges And Local Opportunities For The Screen Industry'

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The views contained in this report are those of its author only and all comments and/or enquiries should be thus directed to me at: gianluca.sergi@nottingham.ac.uk

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Executive Summary

This report looks at the current state of film and TV studios, their business models, relationship with the industry and key challenges they face as filmmaking practices adapt to the digital age. In particular, the report focuses on the role of studio space, the evolving nature of production studios and the emergence of new models of production and corresponding facilities to support these.

Section 1 of the report paints a brief but necessary historical picture of the development of studio facilities from the vertically integrated days (with studios owning and managing the full spectrum of the film industry from production to distribution and exhibition) to the post-Paramount decree era marked by the diminishing influence of the majors to today's fragmented production landscape.

The report goes on to detail some of the key changes that have informed the development of new studios and the attempts of older, more established production facilities to maintain their market leadership. In particular, the report outlines i) the emergence of new technologies and production genres such as 3D, motion capture and digital animation and the new outfits that these changes have produced, including current industry powerhouses like Pixar Studios and Weta Digital; ii) the resulting growth of a global production market with specialist (boutique) studios emerging in several different production contexts, as in the case of the New Zealand, the UK and Canada, and iii) the first signs of the emergence of the 'next generation' studio designed to capitalise on the opportunities presented by digital distribution and online communities, as in the case of the recent Amazon/Warner venture with the birth of Amazon Studios.

Finally, section 1 positions these developments into the wider context of industry changes that are affecting production spaces and filmmaking practices. Particular attention is given to two key developments: i) the rise in importance of the international box office (i.e. as defined by Hollywood as opposed to the 'domestic' market of the combined territories of the US and Canada). This is forcing studios to rethink their production and distribution slates to take advantage of the rise in ticket sales and theatre count in those countries that are enjoying an economic boom (especially the so called BRIC countries of Brazil, Russia, China and India), by aiming their films more specifically to the international market while, on the other hand, trying to claim a role in the increasingly successful local language markets of those countries by investing in local productions for local audiences; ii) the continuing expansion of tax incentives and other government opportunities for filmmakers and studios that has come to shape production patterns around the world and has given rise to the phenomenon known as 'incentive chasing'. The latter is considered both a) in terms of its potentially negative effects on increasingly fragmented prac-

tices (where a production may film in several different countries with several different crews mostly, if not entirely, because of financial savings rather than any production considerations) and b) in its more constructive understanding as a powerful means for government to support the growth of filmmaking and production communities in regions that in the past suffered the ultimate concentration of production in and around Hollywood (examples of these are provided, from both the US - as in the case of the state of Louisiana - and abroad, with Canada and New Zealand as perhaps the two most remarkable success stories in this sense.

In section 2, the report considers the views from industry on the developments and issues described above. Building on a series of original interviews and consultations carried out specifically for this project with leading filmmakers and executives from studios and organisations (including Fox Studios, Pixar, WETA, Lucasfilm, Dolby, and Studio Babelsberg among others) the report presents these views by looking at its two key constituencies, studio executives and filmmakers, separately as a means to highlight the inevitably discrete suggestions emerging from what are often different, if not diverging, agendas. Particular aspects that emerge from these conversations with executives focus on issues such as new business models, specialisation of production on studios lots (favouring long-term engagements such as blockbuster franchises and long running TV series to individual film projects), the increasing polarisation of production towards blockbusters on one end of the spectrum and small and micro budget productions, SMB, (oscillating significantly from as small as £30k to as high as £10m, similar to the Fox Searchlight model) on the other end, and last but by no means least, the as yet untapped potential of digital modes of distribution and exhibition. Filmmakers on the other hand stress the need to look at existing production workflows to stimulate the necessary innovation to ensure filmmakers and their practices benefit from the new opportunities offered by technology and the shift towards a more decentralised industry, away from the 'centre' of production, a role that Hollywood has played thus far. Intriguingly, most filmmakers also mention the need for greater dialogue, both amongst different film departments and between studios and filmmakers, as a prerequisite to greater efficiency and long term sustainability of the industry. The 'silos' mentality many mentioned is evidently seen as an obstacle to innovation.

Section 2 concludes with considering what, if any, is missing to this equation of change in an increasingly global market that new technologies, especially digital means of production, distribution and exhibition, appear destined to dominate for the foreseeable future. It identifies the issue of the lack of sophisticated research, both in terms of quality data gathering and analysis, as well as how this could lead to innovation and IP generation, as arguably the greatest challenge for the industry if its strategies, investment and practices are to be sustainable in the long term. Recent reports from the UN and the US government amongst others confirm this by strongly criticising

the lack of a fully developed integrated approach to what could be described as Research and Development (understood beyond technology development).
Both executives and filmmakers agree with the need to develop the industry's R&D capacity, though they also stress that neither studios nor filmmakers are equipped to do so nor are they likely to be in the short term. They also significantly suggest that an 'R&D neutral space' would need to be created, with sufficient research and development capacity and expertise, to ensure the kind of dialogue and innovation that is necessary. Unsurprisingly perhaps, in the consultation Universities were often identified as the most logical place where such a neutral space may emerge in view of their R&D remit, research capacity, staff expertise in a variety of different industry-related fields and, crucially, as they would be likely to be seen by filmmakers and studios as 'partners' rather than direct competitors.

In view of the key challenges thus far identified, and the views emerging from consultations with industry, the final section of the report, section 3, outlines a suggestion on how this R&D challenge may be met by looking in particular at the opportunity to develop an articulated offer to industry that would help identify and address some of the core challenges faced by industry while generating cutting-edge research and IP. As a case study, the report looks at the Nottingham region in the UK as an excellent example of the combination of academic resources, industry support networks and production opportunities that would be essential for the success of this enterprise. The report details the 'why, who, what and how' aspects of the project, paying particular attention at identifying the necessary assets, partnerships with industry, regional industry landscape and opportunities. It defines the 'four phases' process at the core of its research unit (consultation, research, prototyping and delivery) and the operational structure it envisages as supporting the process.
The project would build on existing interest from and partnerships with industry and it would be centred around a modular research and production initiative (PRISE - Production and Research Innovation for Screen Enterprises) acting as an ideas incubator as well as fostering production via both the prototyping of IP and providing filmmakers with facilities for SMB productions. The former would build on the considerable research capacity and expertise available in a globally positioned centre of excellence such as the University of Nottingham, the latter would enjoy the opportunities offered by the presence of both organisations whose primary aim is to support and foster production such as East Midlands Media, and the considerable potential of private partners like the Welbeck Estate, a sustainable community project situated in one of the largest estates in the UK able to provide the kind of environment (office space, accommodation, location shooting opportunities, etc.) that would be highly attractive to industry. Welbeck, East Midlands Media and the University of Nottingham's Kings Meadow Campus (with its production studios) would

thus be in a position to attract SMB productions from around the UK as well as providing the prototyping space for the IP and new solutions generated in the R&D unit of the PRISE project. The report concludes by considering the challenges this kind of project would face and suggest possible action to be taken to address those.

An extensive bibliography on the topics dealt with in the report and detail profiles of key studios are provided in this report as a means to facilitate further research and work in this area. For any further information please contact the report's author, Dr. Gianluca Sergi at gianluca.sergi@nottingham.ac.uk

Section One - Studios in the Digital Age: Challenges and Opportunities

Background

For much of motion picture history, Los Angeles has been the global centre of feature film production with Hollywood's vertically integrated studios providing one-stop facilities catering for any scale of production. Today, the studio set-up paints a very different picture as the industry reacts to the fast-evolving digital landscape of film production and newly forming business strategies. Part of this evolving picture is the outsourcing of Hollywood films to overseas production and post-production companies and the subsequent formation of permanent studios bases around the world.

Evidence suggests there are two primary reasons for this widespread move, namely localised tax incentives and the development of specialist production facilities abroad. In what appears to be a long-term initiative implemented by local and federal governments to 'foster economic growth, build infrastructure, and create jobs,'[1] runaway productions are becoming the norm for Hollywood productions. Global tax incentives are successfully luring feature filmmakers away from Los Angeles, whilst state-of-the-art facilities offered abroad, capable to cater cost-effectively to new production trends, further add to the appeal of outsourcing production. In a move to increase cinema audience attendance and counter piracy, 3D and motion capture filming are on the rise. As a result boutique studios such as Weta Digital in New Zealand specialising in digital effects and motion capture are in high demand.

The impact of digitalisation and piracy, coupled with the challenges presented by intensified market competition, both domestically and internationally, have led the studio majors to rethink their overarching business models. In recent years studios have become increasingly fragmented, moving away from the traditional lot space to take full advantage of overseas opportunities as a means to reduce expenditure and gain world-class expertise. These are just some of the significant changes that have shaken-up the industry in recent years, causing it to become increasingly fragmented in its seemingly unstoppable move away from the traditional Hollywood lots. Section 1 will look in details at some of these key changes, with particular attention to the challenges and opportunities presented by new technologies, and the ways in which the increasingly global and fragmented production practices is impacting on studios and their development strategies.

Before investigating these developments in more detail, it might be useful to look briefly at how we got to this situation.

Studios: Then and Now

In the Golden Age of Hollywood (often considered as the late 1920s to the early 1940s) the studio system consisted of the 'Big Five' major studios (Warner Bros., MGM, 20th Century Fox, RKO and Paramount Pictures), vertically-integrated companies controlling the full film chain of production, distribution and exhibition. The vast majority of shoots took place on their soundstages and extensive backlots, occasionally venturing out on location in the surrounding areas. Directors and stars were contracted to studios and could only work for other studios if their contractual agreement allowed. The studios based operations on a Fordist line of production ensuring strict quality control, quick turnaround and a clearly defined brand identity inscribed in their films[2]. The Paramount Decree of 1948 put an end to studio ownership of exhibition theatres as part of anti-monopoly legislation and led to the break-up of the studio system, in the process obliterating the traditional studio business model upon which Hollywood had been built[3]. With the collapse of the vertically integrated system came a 'significant by-product', that of the rise of independents and the emergence of 'healthy competition' within the industry[4]. The mini-majors of the studio era, United Artists, Columbia Pictures and Universal Pictures, were able to become major players, as the leverage of market control shifted from exhibition to distribution.

Conglomeration, synergy and multimedia have largely defined the direction of the film industry since the 1980s[5]. Realignments and restructuring of ownership, together with a new vertically 'disintegrated' value chain, have accelerated a move away from the classic studio model towards a system built around a 'protracted series of fragmented links'[6]. Today, there are six major American film studios dominating Hollywood production, all of which are owned by parent companies under multi-national corporations: 20th Century Fox of News Corporation, Warner Bros. Pictures of Time Warner, Paramount Pictures of Viacom, Walt Disney Pictures of The Walt Disney Company and Columbia Pictures of Sony Corporation of America and Universal Pictures of Comcast/General Electric. Following the divestiture of the major's theatre interests, the studio's activities are now focused largely around the development, financing, marketing, distributing and merchandising of films. All of these conglomerates have diverse portfolios that include other entertainment divisions such as animation studios, television networks, and publishing and music companies. Due to widespread ownership of the entertainment sector control, these six majors lay claim to an 85% total market share of the industry[7].

Studio Profile 1 - The Multi-Media Production Facility: 20th Century Fox

As one of Hollywood's major film studios, 20th Century Fox is owned by the multi-national media conglomeration News Corporation and is based in Century City, West Los Angeles.

The studio was formed out of a merger between William Fox's Fox Film Corporation (founded in 1915) and Twentieth Century Pictures founded by Daryl F. Zanuck, Joseph Schenck, Raymond Griffith and William Goetz in 1933. It produced some of the greatest stars of Golden Age Hollywood, including Shirley Temple, Betty Grable and Marilyn Monroe. The studio was purchased by Rupert Murdoch's News Corporation in 1985 and has since produced some of the most successful film franchises of all time including Star Wars (1977-2008), X-Men (2000-2011), Alien (1979-2004) and Home Alone (1990-1997).

Fox Searchlight has arguably been the most notable division of the Fox studios group in recent years. This speciality division focuses on independent films that can be somewhat difficult to market but have the potential for mass appeal. With production budgets never exceeding $15 million[8], the division has enjoyed unprecedented commercial and critical success with films such as Little Miss Sunshine (2006), Slumdog Millionaire (2008- winner of eight Academy Awards), Black Swan (2010) and 127 Hours (2010).

In terms of the production facilities and services offered in Hollywood, Fox has a studio complex that can cater for any scale of feature film and television production, the archetype modern 'multimedia production facility'. Located on a 50 acre lot, the site houses over eleven soundstages and ten back lots for feature film and television production, and also includes the offices of its entertainment divisions; 20th Century Fox Films, 20th Century Television, Fox 2000, Fox Searchlight, Fox Television Studios, 20th Century Fox Animation, 20th Television, 20th Century Fox Home Entertainment and Fox Cable Networks. In addition to film and television production, the complex offers distribution, marketing, merchandise and financial services. Originally much larger in size, Fox was forced to sell-off 180 acres of back lot in 1961 following a string of expensive flops, culminating in the infamous box-office disaster of Cleopatra (1963). The site is located in the business district of Los Angeles where law firms and executives are based, often closely associated with the creative industries. Fox is in close proximity to Creative Artists Agency, one of the leading talent agencies in America while other surrounding amenities include the Westfield shopping mall and numerous hotels. Public transport to the Fox lot includes bus routes and metro lines, and there is an on-site car park for staff and visitors. Los Angeles International Airport is nine miles away and Bob Hope Airport in Burbank is twenty-one miles away. The studio has its own transportation department for feature film production that offers lifts and condor services, shuttle buses, an airfreight department, production vehicles and tractors.

20th Century Fox also has a 32 acre base in Sydney, Australia that houses stages, production offices, and over 60 independent businesses on site. Surrounding Fox Australia, there are amenities such as animation and digital effects facilities, cinemas, entertainment venues, music editing and composition companies, schools, production services and sports stadiums.

Above: Photograph of Fox Plaza

In terms of individual studio performance, Warner Bros has consistently outperformed all other studios in recent times (2008-2010), claiming a total market share in 2010 of 18.2%, a total gross of $1923.9 million and 36 movies tracked[9]. Over the same period, Paramount has held onto the second biggest market share, securing 16.2% in 2010 and grossing a total of $1,714.5 million from 19 movies tracked[10]. From 2008 to 2009, Sony came in third[11], however in 2010 the company was overtaken by Twentieth Century Fox, claiming a market share of 14.0%, a total gross of $1,482.2 and 20 movies tracked[12]. 2010 proved to be yet another 'top-heavy' year, reflected in the fact that 25 movies made $100 million or more and much like 2009, the box-office was dominated by sequels, which accounted for $2.62 billion of the total gross[13].

A single studio is estimated to spend between $750 million and $1.3 billion a year on production alone

In 2007, with the average studio film cost at approximately $71 million (negative costs alone) each of the major studios was estimated to spend between $750 million and $1.3 billion a year on production only – far more than the independent sector as a whole[14]. Whilst major studios have continued to focus their efforts on big-budget blockbusters, they have simultaneously stepped-up investments in the low budget feature. This appears to be pushing the industry towards a polarisation of production budgets.[15] Four of the major studios have divisions that produce low budget, speciality films including Paramount Vantage of Paramount Pictures, Fox Searchlight of 20th Century Fox, Focus Features of Universal Pictures and Sony Pictures Classics of Columbia Pictures. These subsidiaries have enjoyed considerable financial and critical success in recent years, as is demonstrated in the case of Fox Searchlight. The studio's Academy Award-winning Juno (2007) was made for just $7.5 million and grossed $231 million globally[16], whilst Slumdog Millionaire (2008) grossed $377 million worldwide with a budget of $15 million, winning eight out if its ten Academy Award nominations[17].

The development of major studio in-house 'indie' subsidiaries, triggered in part by the success of Pulp Fiction (1994) - Miramax's first project under Disney ownership - marked an attempt to undermine the competition posed by the true independents. With the majors choosing to focus their business model on a slate of big-budget blockbusters and low-budget 'indie' films, independent studios and mini-majors have moved in to fill a gap in the middle market. According to some industry analysts the majors have 'too much overhead and too many contractual obligations to produce movies in that cost range'[18]. The most influential 'mini-major' studios as of 2010 are Lionsgate, Summit Entertainment, DreamWorks SKG, the Weinstein Company and MGM. After emerging from bankruptcy in December 2010, MGM are also returning to production with a number of projects, including the lucrative Bond franchise. In February 2011, the studio signed a deal with Sony Pictures Entertainment to take over distribution of its 4,000 films on DVDs and on digital platforms worldwide, including the next two Bond films[19].

New Technologies, New Possibilities

In the face of growing competition from the independents and mini-majors at home, major studios have long embraced additional avenues of profit such as merchandise, video/DVD and soundtracks. However, recent years have seen studios purchase other entertainment related companies and divisions, as film production and ancillary markets have suffered from a variety of negative factors, piracy and contracting DVD sales above all others. Significantly, the film divisions are now seen as 'relatively small contributors' to the total revenue and profit of the media conglomerates to which they belong, thus forcing studios to move beyond investment in traditional studio spaces (i.e. the lot) into an increasingly diversified offering built mostly around new opportunities offered by digital technologies and brand value[20]. The latter is particularly prominent in Warner's decision in 2011 to invest £100m in the development of a new permanent studio facility in Leavesden, near London[21]. Arguably, this is a decision owing more to the potential returns from the Harry Potter World theme park that will be attached to it rather than the actual production lot it already houses and that has been used to film the Harry Potter films[22]. In a further significant diversification move from the studio, Warner also acquired in 2011 the online outfits Rotten Tomatoes and its company Flixster[23].

A further high-profile example of brand investment away from traditional studio lots comes from Italy. The legendary Cinecittà studios in Rome, home to classics such as Cleopatra and Ben-Hur, are partly being transformed into an amusement park in an attempt to save the 100-acre lot from closure. As deputy General Manager Maurizio Sperandini explains "We cannot guarantee big profits with film, meaning we need parallel projects based on the brand"[24].

This move away from traditional investment is not without risk for studios: in 2006 20th Century Fox's parent company, NewsCorp acquired the social networking site MySpace for US$580M in a bid to keep pace with its key competitors as Disney, Paramount and Warner had by then already moved into the digital distribution arena. However, its difficulty in finding a suitably sustainable business and management model for this venture ended with NewsCorp's sale of MySpace in 2011 for a reported loss of over US$500M, testifying to the problems studios have been experiencing in turning the potentially game-changing online distribution market into a profitable enterprise[25].

Along with many of the major studios, independents have also been active in the digital arena. One noticeable example is Relativity Media's recent deal with Video on Demand service Netflix, granting the service 'the right to stream Relativity's upcoming single-picture releases several months after the theatrical release, bypassing the long-term pay-TV slot controlled by Showtime, HBO and Starz'[26]. This opens Relativity up to a multiple platform exhibition approach: 'Relativity can still enjoy the fruits of electronic sell-through on platforms such as iTunes or Amazon, something pay-TV operators can restrict in their deals[27].' In a move that is symbolic of the growing interest amongst studios to produce small and micro budget products specifically designed for online distribution and consumption the company has recently created RogueLife, a 'digital studio' designed to produce online content and has also launched their own social networking portal at www.iamrogue.com

DVD sales plunged 20% in the US in the first quarter of 2011.

Recent developments in digital distribution channels and illegal downloading have challenged the persistence of a studio monopoly dominated by the major six. According to a report by industry body the Digital Entertainment Group, DVD sales plunged around 20% in the US in the first quarter of 2011, falling from $2.58bn to just over $2bn in the first three months of the year[28]. With the dynamics of traditional exhibition revolutionised and the established economics of the industry under threat, the international film business is said to stand on a 'delicate cusp' and 'Changing technology and user demand are radically challenging the established 'window' structure so favoured by the studios'[29]. Studios are adopting new social networking sites and video streaming technologies as an alternative means of marketing and exhibition. However, VoD continues to suffer from it 'historical' problems, particularly acute in the case of the threat of piracy, internet networks' capacity to handle the increased flow of data, and the difficulty in finding a feasible subscription fee model for consumers and is thus unlikely to be a complete long-term solution to the exhibition challenges faced by the studios in the digital age.

A Digital Brave New (Global) World: The Rise of the Specialist Studio

A third of the $150m budget for a blockbuster is now typically spent on special effects

With a third of the $150m (£90m) budget for a blockbuster now typically spent on special effects and post-production work - a figure that is expected to increase in the years to come[30] - a relative newcomer to the studio scene, the specialist studio facility, is thriving. A direct consequence of the introduction of digital technologies, specialist or 'boutique' studios have grown increasingly influential in the landscape of studio production. In many ways, these new studios and production facilities have become the vanguard of the rethinking of what 'studio space' means. They provide a crucial bridge between the traditional studio lot and the physical-less virtual studio of the future. The emergence of this new entity is directly related to the increasing role played by post-production departments, digital effects in particular, and the emergence of digital animation as a major force at the box office, most noticeably with Pixar Studios, whose remarkable string of box-office success (culminating with Toy Story 3 becoming the highest-grossing movie in 2010)[31] has rekindled interest in animation amongst virtually all major studios (see inset for Pixar profile).

Today a third of negative costs of a blockbuster (i.e. cost before print and marketing) is spent on average on special effects and post-production work. This figure is expected to increase in years to come as technologies such as 3D and performance-capture become more widely used. With demand for visual effects growing, international studios that specialise in these services have succeeded in luring major productions away from Hollywood. Avatar is perhaps a point in case, The film employed no less than 16 special effects studios the majority of which were located outside the US, like Framestore (UK), BUF (France) and Hybrid Technologies (Canada), and, of course, WETA Digital (New Zealand).

Studio Profile 2 - Animation Studios: Pixar

Pixar's films changed the animation landscape with the release of the first computer animated feature film Toy Story (1995). Its films have since collectively gained 35 Academy Award nominations and nine wins. Pixar Animation Studios' business model mirrors at least partly the old studio complex in that filmmakers are employed by Pixar on contracts and not a project-base, thus allowing the studio to develop a rather unique production environment in the current production landscape.

Above: Pixar animation studios main entrance.

Pixar is owned by the Walt Disney Company and specialises in producing its own computer generated animation films that are distributed by Walt Disney Pictures. It is based on a campus facility in Emeryville, California in the western Alameda County, with an additional base in Seattle, Washington. The campus is currently undergoing a huge expansion to be completed by 2025 that will see the total space increased from one to five buildings, (area increase of approximately 500,000 square feet) and staff employment at the headquarters up from 625 to 1,975[32]. At present, all feature film activity takes place in one central office building that houses everything from the creative services to the staff restaurant. In addition to complete digital and 3D animation services. The Pixar lot also offers its own post-production services and facilities, including RenderMan software that has been specifically designed by the studio to cater for its CGI animation. Software capabilities include: motion blur and depth of field, fur and hair, camera controls, particles, volume rendering, curve rendering, global illumination, ray tracing and co-shaders. Additional post-production facilities include film laboratories, Foley and ADR services and preview theatres.

In terms of the surrounding community and support infrastructure, Pixar's Emeryville campus is located 11 miles from the San Francisco Bay and between the cities of Berkeley and Oakley in California. The campus is easily accessible by public transport with an Amtrak station offering national rail services located 1 mile from the lot. There are three surrounding inter-state freeways surrounding Pixar and eight bus routes available. Two airports are close-by, San Francisco International Airport is 25 miles away and the Oakley International Airport is 10 miles away. Pixar makes an important contribution to the local economy as the top major employer in Emeryville[33] and also parts funds a free shuttle bus service, the Emery Go-Round, for residents. In May of 2011, Pixar expanded its services further by opening a 20,000 square foot Vancouver base that will head the production of its short films for television.

With favourable exchange rates, local skilled workforces and world-class production facilities, countries such as Canada, the United Kingdom and New Zealand have experienced an influx of major Hollywood films seeking to reduce production expenditure. Avatar's pioneering 'Ocula' 3D technology was especially developed for the production by London-based firm The Foundry. Boasting a catalogue of big-budget features, The Dark Knight (2008), Tron Legacy (2010) and Alice in Wonderland (2010) to name just a few, The Foundry has a well-established international client base that includes leading visual effects facilities such as Warner Bros, The Moving Picture Company and Sony Pictures Imageworks[34]. The company is one of many visual effect specialists based in the London's Soho district and forms part of a wider 'creative community' that has benefitted greatly from the move towards an effects-driven Hollywood. Also housed in the area, Double Negative Visual Effects is one of the UK's leading post-production houses and won its first Academy Award in 2011 for its work on Inception (2010). Currently providing the visual effects for part two of Harry Potter and The Deathly Hallows (2011) and Christopher Nolan's The Dark Knight Rises (2012), Double Negative is helping to establish London as a provider of world-class special effects.

Outside of the capital, the Pinewood Group (consisting of Pinewood, the largest studio complex in the UK, Shepperton and Teddington studios), offers a 'one-stop shop' for all production and post-production requirements. A multi-million pound development known as Project

Pinewood, (subject to planning permission), will begin shortly and will see 1,500 homes built on the studio's site, complete with a school and on-site post-production services for the studio.

Studio Profile 3 - The Self-Contained Lot: Pinewood Group

The Pinewood Group is an example of a business model where all production and post-production activity takes place on one self-contained studio lot. Comprising of three studio complexes (Pinewood, Shepperton and Teddington) spread between Middlesex and Buckinghamshire, the Pinewood Group is the largest studio facility in the UK. Pinewood Studios has housed some of the highest-grossing British franchises of all time, most famously James Bond and Harry Potter. The Studios also has a number of American blockbusters to its name, including The Bourne Ultimatum (2007), The Dark Knight (2008), and Pirates of the Caribbean: On Stranger Tides (2011), as well as television serials and commercials, which attest to the global appeal of this studio model.

The facilities and services available are extensive and can cater for any scale of production. There are over 30 soundstages, twelve water tanks, one under water stage, seven back-lots and seven studios. The facility is also home to the largest soundstage in Europe, the 007 stage, measuring over 59,000 square feet. All production services are housed on-site and include the latest motion capture and 3D technologies. Where the Pinewood Group sets itself apart from most other major studios, its USP so to speak, is in the flourishing on-site creative community it offers made up of over three hundred independent companies. Post-production services include cutting rooms, film laboratories, Foley and ADR services, music composition, preview theatres and software services to name but a few. In terms of on-location filming, the sites have two manor houses, formal gardens, a lake, woods, fields, concrete roads and a multi-storey car park set on one hundred acres of private grounds.

With regards to surrounding communities, Pinewood Studios is adjacent to Iver Heath village in the rural countryside of Buckinghamshire and the local council is South Bucks District Council and the screen agency for the region is Screen South. In terms of transport links to the three sites, London is located 23 miles from Pinewood Studios and is accessed by Uxbridge tube station with a free shuttle bus service. Heathrow International Airport is 8 miles away and is easily accessed via the M25, which is adjacent to the site. Public transport to the site includes train, tube and taxi services, as well as an on-site car park for visitors and staff.

Pinewood has additional studio facilities around the world in Los Angeles, Toronto, Berlin and Hamburg, Iskandar (Malaysia) and a new facility planned for the Dominican Republic due to open in early 2012 to cater for the Latin American market. The Toronto base houses one of the world's largest custom built soundstages. The Group is currently undergoing huge expansions plans known as 'Project Pinewood', which is due for completion in 2022[35].

The UK is not alone in making a name for itself as a global production hub offering first-rate specialist services. New Zealand has seen the rise of 'Wellywood', a community based in Wellington that is home to a number of production and post-production facilities, most notably the Weta group. Weta describes itself as being part of 'a neighbourhood of creative companies'[36], including Weta Workshop, Park Road Post Production and Stone Street Studios, forming a close-knit creative nexus. Over the past decade, Weta has welcomed a number of major blockbusters from studios overseas, such as the Lord of the Rings trilogy (2001-03), King Kong (2005), The Chronicles of Narnia (2010), Avatar (2010) and The Hobbit (2012). In addition to post-production services, the production process itself is becoming a much more global practice, a trend that is facilitating this geographical move by studios. Steven Spielberg's latest film The Adventures of Tin Tin: The Secret of the Unicorn (2011), was shot in motion capture in Los Angeles overseen by Spielberg, while Peter Jackson, the producer/director and Weta founder, was often contributing from his New Zealand base. When the production moved to Weta in Wellington for post-production, the process was reverted as it was Spielberg who oversaw work remotely from Los Angeles[37]. It is unsurprising that filmmakers are utilising new technologies to reduce costs and adapt to runaway productions that are quickly becoming the Hollywood norm and is a trend we are likely to see more of in the foreseeable future.

Studio Profile 4 - The Boutique Studio/Specialist Studio Facility: The Weta Group

Weta is an example of the newly emerging boutique studio model that caters for a specialised production often from overseas, offering a very different model to the traditional Hollywood studio. Based in the up-and-coming suburb of Miramar, Wellington, the company was formed in 1987 by Richard Taylor and Tania Rodger and provided services in special effects, creature work, prosthetics and make-up. As well as specialised houses such as Weta Workshop and Weta Digital, the area offers production space in the form of Stone Street Studios, post-production house Park Road, and equipment hire from Portsmouth Hire.

Today, Weta's specialist services include; conceptual design, creatures, props, costumes, models, special make-up and prosthetics and has provided services to films such as The Lord of the Rings (2001-03), Hellboy (2004), District 9 (2009) and The Adventures of Tin Tin: The Secret of the Unicorn (2011). A sister company, Weta Digital was formed in 1993 with the help of film director and New Zealand resident Peter Jackson, offering a range of post-production digital effects services; from crowds to digital doubles, environment and destruction. Weta Digital has worked on films such as King Kong (2005), The Lovely Bones (2009), The A-Team (2010) and Rise of the Planet of the Apes (2011). Together, Weta Workshop and Digital have five Academy Awards to their name.

Above: WETA, Park road studios.

In terms of infrastructure, Weta Workshop and Weta Digital amount to 65,000 square feet, the largest specialist facility of its kind in the world[38]. Located a short distance away from Stone Street Studios and Park Road, the surrounding community plays an important part in sustaining the studio's business model. Weta is located 4.5 miles from Wellington city centre where the Government is based, and is a short distance from Wellington Bay making it easily accessible for freight services. In terms of transport links, Wellington International Airport is just 1.5 miles away with airport shuttle buses offering a free service to Miramar. Public transport to the area includes the metro, buses and tram services, as well as Weta being accessible by foot.

The creative community has had a largely positive impact on the region particularly in boosting tourism to the region and New Zealand overall[39]. Weta have recently opened the Weta Cave in Miramar, an exhibition offering an insight into the work done at the workshop. Entrance is free to the general public and includes access a museum shop, set, character and prop displays and a twenty-minute documentary feature with behind-the-scenes access to the facility. A Weta Cave shop is also due to open in Auckland's Sky Tower in August 2011 for three months.

The migration of major studio's productions away from Hollywood to overseas facilities such as Weta and Pinewood provides further evidence of the overall fragmentation of the industry. This trend goes hand-in-hand with strategic restructuring of the traditional Hollywood studio space. The selling-off of studio land to repay debts has led to a downsizing on physical backlot space as well as staff, resulting in entire departments being outsourced to cheaper overseas facilities[40]. There are of course noticeable exceptions that point to possible alternative approaches to business modelling and production patterns. One such exception is Studio Babelsberg, formerly known as UFA, the oldest studio facility in the world based in Potsdam, a suburb of Berlin. Indeed, Babelsberg is going the opposite way of fragmentation by consolidating all feature film services on one accessible site and keeping hold of its traditional departmental structure. Studio Babelsberg can be seen to uphold a classical studio model, its process of production remaining largely unchanged over the years in spite of the great shake-ups the industry as a whole has witnessed.

Studio Profile 5 - The 'Studio For Hire' Model: Studio Babelsberg

Studio Babelsberg in Germany is perhaps one of the largest and certainly the oldest film studio in the world[41]. Celebrating its centenary next year, Babelsberg has been home to some of the most famous productions in history, the likes of The Cabinet of Dr. Caligari (1920), Metropolis (1927), whilst recent hits include The Bourne Ultimatum (2007), The Reader (2008) and Inglorious Bastards (2009). Unlike many of the Hollywood majors who are increasingly farming out their productions and disintegrating their studios, Studio Babelsberg follows a very different business model. Publicising itself as a 'Studio for Hire', Babelsberg is a facility specifically designed to attract major international feature film and television productions. Located in Potsdam, Berlin, Babelsberg offers a one-stop facility for film, providing all production services on site. Due to its capacity to accommodate several large scale productions at once, Babelsberg is able to cater for a wide range of both film and television productions -

a major point of difference from the studios such as Fox that are encouraging long-term television serials to shoot on its lots in favour of films.

One of the first film studios ever to be built, Babelsberg has retained a traditional business model to this day and continues to operate a Fordist production line of service, reminiscent of the Hollywood studio system. This model of business allows the studio to promote its greatest selling point as that of 'quality control' as filmmakers can oversee all aspects of production on site at Babelsberg instead of having to farm out aspects to external companies and risk losing creative control.

In terms of facilities and services, Studio Babelsberg offers a complete set of services that a feature film could need. On the 39-acre lot there are 16 sound stages, back lots, exterior sets and, in addition to production facilities, amenities such as financial and crewing services. With special effects houses, Germany's largest water tank, and a number of permanent sets such as life-size Boeing 737, the studio can cater for any type of production. Babelsberg is home to one of the largest collection of props and costumes in the world, with a department of over 250,000 costumes and 1 million props[42]. In terms of location, Studio Babelsberg is situated in the region of Potsdam, 22 miles west of Berlin. Public transport facilities to the studio include trains, buses and trams, while Berlin Schönefeld International airport is 30 miles away and is accessible by a motorway close to the studio.

The Next Generation Studio

An emblem of tradition, the business model upheld by Studio Babelsberg contrasts most markedly with that of the newly-launched 'Amazon Studios'. Unveiled in November 2010, Amazon Studios is the product of a partnership between Amazon.com and Warner Bros Pictures and represents the first official production set-up online. Described as 'a new online business to discover new talent and develop motion pictures', the studio will award filmmakers and screenwriters $2.7 million with the aim of developing films under a 'first-look' deal with Warner Bros[43]. Writers are invited to submit scripts and filmmakers to add full-length test movies. If released by Amazon Studios as a theatrical feature film, the submitter will receive a rights payment of $200,000; if the movie makes over $60 million at the U.S. box office, the original filmmaker or screenwriter will receive a $400,000 bonus. While this may become a template for future initiatives of this kind the outlook is yet uncertain. This is particularly the case with regards to potentially conflicting issues such as the role of filmmakers in this new process and their rights over the materials produced and digitally distributed.

There are signs that other models may also be emerging, going further than current studio complexes in offering a combination of traditional studio facilities and departments with office space, accommodation and other amenities in what resembles more a small sized town rather than a film studio. Perhaps the most evident example of this is the newly developed Media Campus Studio (MBS) complex just outside Los Angeles[44] soon to host the production of the sequel to Avatar. Already hailed alternatively as 'the most technologically-advanced major production studio outside of Hollywood'[45] and as 'Hollywood by the sea', MBS is also interesting in its intended commitment to eco-friendly practices and sustainability possibly hinting at a new trend with studios placing environmental issues closer to the heart of their operations. This independently owned lot has in place a pioneering water conservation program, eco-friendly cleaning products, sustainable cafe and several programs to promote greener transportation by its employees[46]. The language employed to describe studios as a 'campus'-like 'interconnected' space is another sign of a growing tendency within the industry towards rethinking the traditional production space and the human networks governing its operations.

Profiling key studios for this report has highlighted a number of key issues. What is clear is that no two studios are the same in their set-up and, perhaps unsurprisingly, do not appear to be moving in the same direction in terms of planning for the future. There is evidently a lesser degree of standardisation across studio business models when compared to other industries with little or no consensus as to what business practices are most likely to succeed and be sustainable in the long term. While 20th Century Fox is farming out its business and reducing film production on lots, Warner Bros. are purchasing and refurbishing new studio space abroad. While Pinewood are setting up various studio bases around the world to meet production demands, Studio Babelsberg are bringing international productions to their facilities by consolidating production services onto one extensive lot.

The Rise of the International Box-Office: Opportunities and Challenges for Studios

The foreign-language market accounts for 65% of the total global box office gross

In this changing production landscapes in which Hollywood studios battle to reduce costs by farming out their services, the global market itself is rising in both economic and cultural importance. Hollywood films have benefitted from the growth in cinema attendance in foreign markets: as a recent report carried out by Deloitte suggests: 'Today, major U.S. film studios earn most their film and home video revenues from sales in foreign markets."[47]

With a stagnant domestic market in terms of box office (where higher ticket prices mask to some extent the decline in actual attendance) and production costs continuing to rise Hollywood studios are likely to look for novel ways to continue the foreign market trend. At present 67% of the majors' revenue comes from overseas[48], a figure that is growing, so finding a way to more easily penetrate foreign markets will be crucial for Hollywood's future sustainability. As films like 127 Hours (2010) demonstrate, Hollywood is becoming increasingly dependent on the global market to make profit: the film, produced by Fox Searchlight, had a budget of approximately $18 million and grossed $18.3 million in the US, depending on the overseas market for its additional $39 million revenue. This trend is not limited to small and medium budget features either; it applies also to big budget features such as Knight and Day (2010). Costing Twentieth Century Fox approximately $117 million to make, the feature grossed just $76 million in the U.S (29%), compared to $185.5 million in the foreign market (71%). Similarly Pirates of the Caribbean: On Stranger Tides (2011) had a production budget of $250 million and grossed $237 million at home (23%) in addition to over $790 million worldwide (77%)[49].

However, while Hollywood films are earning proportionately more from foreign sales than domestically, the longer term picture is one that may challenge the very substance of the dominance enjoyed by US studios over the years. The economic growth of emerging countries, appealing tax incentives, development of new facilities and the effective use of new technologies are fuelling flourishing foreign film markets making these increasingly more profitable and able to withstand the historically dominant influx of English-language films from Hollywood. The data available points in this direction unequivocally: the foreign-language market currently accounts for 65% of the total global box office gross, a figure likely to increase as emerging markets continue to grow in influence[50]. Nowhere is this more apparent than in the case of countries like Brazil, Russia, India, China (also referred to as BRIC countries) and arguably, South Africa, where the growth of the middle classes and their corresponding increase in leisure expenditure are being matched by increased local investment in film, TV and video games production aimed at capturing a growing percentage of domestic markets. Earlier this year, Variety published an article detailing the full extent of this market expansion: 'Last year, Chinese totals soared 64% over 2009, with box-office local players like "Aftershock" and "Let the Bullets Fly"; in Russia, Hollywood 3D toons helped lift regional grosses by 56%. Brazil was up an overall 30% in 2010 - while year-end projections for India could mean significant growth if studios' $2 billion estimates hold true through March, when final figures are available.'[51]

In 2005 box-office receipts in China were around $239 million; last year they reached a total of approximately $1.5 billion. Local productions accounted for 35% of China's total box office, with just over 500 features produced in China in 2010, up 15% from 2009[52]. China's strict quota of 20 foreign films a year was terminated in March 2011 and will likely have an impact on total box-office gross for Hollywood features in the future[53]. In India, local films, as well as an increased presence of Hollywood releases, drove the country's box office growth last year. The number of admissions in Russia exceeded the total population for the first time, with 160 million tickets sold, 17% of which were accounted for by local films[54]. Similarly, Brazilian audiences embraced a mix of both U.S. and local films. Attendance was up 20%, representing the country's best box-office performance in 30 years[55]. The 80 Brazilian films (including international co-productions) released in 2009 accounted for 15 percent of the market, a 50 percent increase compared to 2008[58] and Brazil's top local earner was Elite Squad 2 (2010), which sold 11 million tickets, stood as the most amount of tickets for a homegrown film since local statistics began. South Africa is increasingly being talked about as 'the final untapped investment market'[57]. Last year 23 local films were released, one of which, Shucks Tshabalala's Survival Guide to 2010, set a new box office record for South African films, grossing R37.5 million (US$5.2 million).

At present 67% of the major's revenue comes from overseas

Indeed, there are signs that the inevitable clash between these two trends is already beginning to take its toll on the market share of Hollywood films abroad. This is the case across some key foreign markets: in Japan, local films now outperform foreign productions after decades of Hollywood dominance (there has been a 30% shift in the market share in favour of local films over the past ten years alone); in China, the lifting of the 20 films a year market quota in early 2011[58] might indicate greater foreign presence in the future but it must be balanced against the huge growth of the domestic market and the historic stronghold that local productions have on it (as in other areas of the Chinese economy growth is unprecedented: cinema attendance is growing at 40% annually and there are three new cinema screens opening every day); in India, a huge market historically dominated by domestic productions, Indian movies account for roughly 90 per cent of box office revenues[59].

Hollywood studios appear to be aware of this threat and the potentially devastating body blow it could deliver with increasingly larger shares of foreign markets going to domestic productions thus reducing income for Hollywood exports while also reducing its overall influence in terms of market penetration. In an attempt to increase revenue abroad the major studios are 'aggressively stepping up their international local-language activities'[60]. Hollywood studios such as Disney and Warner Bros. are producing local-language films and Fox International Pictures is 'co-financing and co-creating foreign language films for local audiences' after successfully distributing foreign independent films such as My Name is Khan (2010)[61]. Released under the banner of newly formed speciality division 'Fox Star', My Name is Khan had an approximate budget of $12 million and grossed $42 million worldwide[62].

Due to the formidable growth of the Chinese film industry, studios are also strategically intensifying their efforts in the Asia market. As Rupert Murdoch, CEO of Twentieth Century Fox's parent company News Corporation explains 'We are equally committed to producing local fare in partnership with Chinese production companies. For example, we are now working with talented Chinese partners such as Hua-Yi Brothers and others to co-produce and release local films such as Hot Summer Days and its upcoming sequel Love in Space[63].'

Fox has also recently formed Fox World Cinema, 'a newly created premiere line of diverse films from around the world which will be available on DVD, Video On Demand and Digital Downloads in the United States later this year'[64]. Sanford Panitch of Fox International Productions states that, 'we're seeing opportunities in some markets where the local films are sometimes out grossing Hollywood films or have such a significant market share that the only way to participate in those markets is to make local films.'[65]
It would appear that studios face a tough road ahead in an increasingly globally competitive market where 'the picture […] is one of shifting dependence on the US market' as 'statistics from certain countries paint a picture of dwindling interest in standard Hollywood fare.'[66]

Tax Incentives, Runaway Productions and the 'Chasing Game'
The number of on-location production days in Los Angeles measured in 2009 stood as the lowest since the recording of production days began in 1994. The 2010 figure, a slight improvement on the year prior, was still half the all-time high recorded in 1996. As indicated earlier, global tax incentive initiatives are creating a competitive landscape that is seeing business migrate away from the traditional confines of the Hollywood studio lots. This trend has been witnessed across a spectrum of different industries: 'In the past decade, Southern California has become to the film and television industry what Michigan is to the automotive business: still the centre, but one that has seen other states lure away significant pieces of its heritage industry with permissive labor laws and gaudy incentive packages.'[67]

Shooting outside the confines of the studio lot is by no means a trend reserved to modern productions. The issue came to prominence first in the early 1950s when the Hollywood Film Council of the American Federation of Labor launched a campaign in a bid to end runaway productions. As the committee's chairman Dolph Thomas explained to the New York Times in July 1952

'We will try to stop the growing tendency here among Hollywood producers, especially in television, to do their shooting in foreign countries principally to cut costs. Hollywood employment already has been considerably decreased by these activities.'[68]

However, recent developments in the ways in which affordable locations and studio space are combined and matched to incentives, and the emergence of strong local talent pools to crew foreign productions has considerably increased the attractiveness of moving film and TV projects from the traditional studios powerhouses to a variety of emerging and specialised operations. The emergence of 'boutique studios' catering to specialised needs, particularly focussing on visual effects, motion capture, and animation, has been greatly facilitated in some countries by a coordinated effort between industry and government. Perhaps the two most evident examples of this 'novel' approach to studio development and production practices come from Canada and New Zealand. All of Canada's ten provinces offer incentives linked to production none of which are at present under review, a clear symptom of political support for the industry and of the success of the various schemes.

This is mostly due to being able to link closely the types of incentives available and the local growing film sector. To name two noticeable success stories, Ontario and British Columbia offer a 20% and 17.5% bonus respectively for computer animation and digital effects productions, a likely indication as to why an increasing number of major production companies have set-up permanent bases there[69]. This clear articulation of facilities and incentives has proved very attractive for foreign studios looking to expanding their production operations abroad: the UK's Pinewood Group has new production offices in Toronto, whilst Pixar Animation Studios recently formed Pixar Canada, with new offices built in Vancouver to produce short films for television while Warner Bros. Canada is opening new video gaming offices in Montreal to take full advantage of the special effects bonus incentive.

Similarly, the New Zealand government has targeted incentives to tailor local production capability. It offers tax incentives specifically to encourage big budget productions over $200 million and those requiring extensive visual effects, thus complementing the development of Wellington, the home to the WETA group as a major film destination. The Large Budget Screen Production and the Post-Digital Effects Production incentives are significantly attractive providing companies with cash grants of between 15% and 40% of the cost of production (the latter, larger figure is limited to productions over the $200 million mark). As in Canada, productions must use local New Zealand companies and crews or a foreign corporation operating with a fixed establishment in New Zealand. Incentives are due for review in 2011 and are likely to continue due to the success of the country as an emerging filmmaking economy.

In the US there are both federal and local state incentives aimed at luring production away from Los Angeles that apply to above-the-line labour only. For productions to be eligible, basic criteria state that 75% of shooting must take place in the US. The tax incentive applies to the first $15 million of production costs that increases to $20 million in low-income areas, with the potential for 100% of production costs to be eligible for the incentive depending on the production budget[70].

With many US states offering tax incentivised schemes, in addition to building an increasing number of modern production facilities and a growing skilled pool of professionals, California entered the game rather late. When the state appeared to begin losing television production to New York in addition to already significant number of runaway film productions it finally introduced the 2009 'Body of Proof' program of tax credits[71]. This is a non-refundable credit of 20% for films, with an additional 5% offered to independent productions and television series and is due for review in June 2014. In 2010 the number of on-location production days in Los Angeles surged 15% from the previous year[72] proof to some extent of the impact that tax incentive schemes of this kind can have. Paul Audley, president of FilmL.A., the independent organisation that tracks and issues shooting permits in L.A. attests to this positive repercussions of the program 'Our numbers show that we would have seen a continued drop in feature filming in L.A., which is still below 50 percent of what it was at its height. But every single bit of the small turnaround we've seen has been in films that received the California incentive.'[73]

The United Kingdom offers Film Tax Relief with a cash rebate of 20-25%, [74] linked to overall budget amount. Films must either pass the Cultural Test or qualify as an official co-production, must be intended for theatrical release, must reach a minimum UK spend requirement of 25% (including those made under the official co-production treaties) and the film production company responsible for the film needs to be within the UK corporation tax (net).[75] Please see http://www.hmrc.gov.uk/manuals/fpcmanual/index.htm to find out more. To state the obvious, without such incentives the whole development strategy adopted by most traditional studios in the UK, centred around the increase of studios footprint to accommodate international demand, would likely collapse entirely. These incentives are crucial to the long term sustainability of all of the major UK studios, thus pointing to a serious source of concern. Since the current and foreseeable planned expansion of studio space in the UK is based on the ability to attract large Hollywood productions to outfits like Pinewood, Elstree and Leavesden the uncertainty surrounding government incentives poses a considerable threat to this model of growth, especially as some incentives are replaced with tax breaks for British companies, a less attractive proposition for foreign productions to relocate to the UK.

Evidently, tax incentives are becoming a primary consideration for feature film productions, as they decide where best to invest. DreamWorks for example states that 'all of the six films set to roll out in 2011 are shooting in locations which offer value…every one of these places has significant tax rebates…we have got to chase the money to keep the value on the screen.'[76] Whilst many American states offer generous tax incentives, the instability faced by such schemes, subject to legislative change at any time, offers one possible explanation as to why so many productions are going abroad. As in the case of studios development strategies, the lack of consistency across incentive schemes means there is no clear direction for the industry as a whole. What is certain is that, as global competition intensifies, the availability of varying, competitive tax incentives can offer substantial advantages to local economies and production companies alike[77].

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Section 2: The View From Industry

As part of this report, several key industry executives and leading filmmakers from several production contexts (ranging from Hollywood to the UK and from Germany to New Zealand) were consulted directly to gather their opinion and views of the analysis illustrated thus far. This was primarily to confirm the validity of the analysis and begin identifying ways forward to address some of the key challenges that are apparent in the analysis.

Executives ranged from those working at large historic studios (Fox, Babelsberg) to those leading more recent establishments (Weta, Pixar) and from specialist technology developers and providers (Dolby, ILM) to professional organisations (like the filmmakers' Guilds in the US). This section summarises and briefly analyses the views about the current and future state of studios and studio practices that emerge out of these conversations with leading filmmakers and executives, most of whom are in a position to shape future developments as leaders of their departments/organisations/studios.[78]

Although there are some important overlaps between the views of studio executives and those expressed by filmmakers the report presents them separately as a reminder of the different sets of professional and individual motives and concerns that inform them and that ought to be taken into account when considering the resulting analysis.

Executives' Views

The consensus amongst studio executives, regardless of location or company, is that the health and sustainability of studios depend essentially on being able to attract productions to their facilities, minimise downtime, and retain flexibility in terms of being able to ramp up capacity in a very short amount of time should the need arise. This in turn requires a large skilled work force living in proximity of studios complexes, good transport and infrastructure as well as support from ancillary markets (catering, logistics, etc.).

Within this relatively traditional view there are considerable differences in terms of how this can be achieved. Geographies of production evidently still play a crucial role in this sense. Most studios outside of the US, especially the large ones, have adopted over the years a business model fundamentally predicated on being able to attract large international co-productions and Hollywood films. This is the case of virtually all large studios in Europe, from Pinewood to Cinecittà and from Babelsberg to Leavesden (again, the ability to offer incentives to production companies 'scouting' for production space and locations plays a key role in being able to attract these kinds of production where competition is extremely high with several key studios fighting over a fairly limited pool of productions).

In a bid to secure production rentals and attract capital most large studios in the world are now directly investing in productions. Traditionally a model of large US studios, (with integrated funding, production facilities and distribution arms), a revised version is being adopted by other studios. Studio Babelsberg (Berlin) and Pinewood (London) are perhaps the two most obvious examples of this trend in Europe. Both are looking into scaling up direct investment in film funding as a means to 'lock' films into utilising their facilities (though explicitly the aim is to support local film/TV production). Significantly, most of this funding goes into SMB productions in a bid to maximise potential returns, confirming the trend towards the polarisation of production. The latter phenomenon sees a tendency towards either large investment in blockbusters or smaller, controlled investment in small and, increasingly, micro budget productions (the latter being seen as more attractive investments as they may provide larger returns 'per dollar spent' than blockbuster ever could).

The escalating cost of the average mainstream film and the emergence of novel ways of consumption, mostly via mobile devices, appear in the mind of executives to have accelerated this process of polarisation. The former has become a symbol of the unsustainable nature of that sector of the industry: data on how much an average movie cost (and the term itself is not a clear one to being with) became such a complicated and controversial issue as to push the Motion Picture Association of America (MPAA) to stop publishing its yearly estimate of average cost of a movie in 2009 (a move seen by many in the industry as trying to protect the increasingly rising 'above the line' costs, especially in the face of a growing global economic downturn). As for internet and mobile consumption, some studios have begun building partnerships with online providers in an attempt to position themselves for the micro-budget market in the hope this will be able to build substantial audiences on the back of the success of YouTube and other similar 'short-format' distribution platforms.

A further important aspect mentioned by all those interviewed concerns the growth of international markets. As evidenced earlier in this report, there is ample evidence of the increasingly significant role played by countries such as China, Brazil, Russia and South Africa that have joined India in providing strong local film and TV industry setups built on the availability of funding, potentially very large audiences and now sophisticated production facilities. Most of those interviewed stressed the growing importance of foreign markets beyond the obvious aspect of box office returns. The prevailing view is that these markets could provide a further area of investment for traditional studios wishing to diversify their business model from one entirely based on renting facilities out to filmmakers to one where a combination of rentals, local investment and international collaboration over local production investment (foreign language productions made for the local market) and distribution deals (for foreign language films to be shown in the US and other key Western markets) might provide longer term stability and efficiency.

A crucial aspect shaping up the makeup of studios according to most executives we spoke to revolves on concentrating productions taking place on the main sites of studio lots around few, long term engagements such as long running TV series and blockbuster franchise productions often requiring in excess of two years of production (from principal photography to editorial, etc.). This business model offers a particular advantage, namely that of minimising downtime for most/all studios facilities (this is especially the case with films such as Avatar and The Hobbit that may choose to film two pictures at the same time for consecutive releases thus maximising the use of studios adopting a production cycle whereby production and post-production facilities can be running at full capacity simultaneously).

In turn, this means that for all other productions the logical way is to relocate to other facilities. This can of course work well for studios if it matches existing tax incentives and especially if the studio behind a particular production already has additional facilities built elsewhere to maximise the incentive advantage. Fox studios is one noticeable example of this. With studios in Los Angeles and Sydney, as well as production agreements with several other studios Fox has in effect focussed production on its main lots on TV series, relocating most film production elsewhere. Apart from obvious incentive advantages this also makes it easier for the studio to retain ensemble casts for TV series together for multiple years due to its location in Los Angeles where most of US actors still reside.

However, this approach is not without its critics. This seemingly effective business model would appear to generate at least two major concerns amongst some executives and filmmakers alike. Firstly, if studios commit their facilities to long running engagements (TV) or large productions (Hobbit-like) this limits the number of projects and attached talent flowing through the studios gates. This may ultimately prove damaging in terms of building longer term affiliation with emerging filmmakers, as opposed to studios that might choose a more agile and varied portfolio of smaller productions accepting the risk of downtime as the trade-off. The second issue stems from the first in that if there are only a few games in town then opportunities for emerging filmmakers (and thus for innovation) are stifled in what is already an over-crowded industry. This is particularly important for smaller production centres that might not have the capacity and work force to support this pressure. One such example is New Zealand. While WETA has been a truly remarkable success story it has done so by primarily committing to a small number of large scale film projects. The New Zealand film industry does not have the capacity of other larger nations who are able to build on much bigger populations and skilled workforce. This in turn has forced Weta to employ foreign labour rather than perhaps build gradually a local skilled work force in partnership with relevant professional and educational institutions. While building this kind of skilled labour and the necessary network of infrastructure and education to support the industry is obviously not Weta's remit it is easy to see why there is a certain degree of concern amongst both executives and filmmakers around the best 'model' for development to adopt.

Although established traditional studios are beginning to react to this potentially serious obstacle to growth in the longer term by investing in smaller productions, mostly under the understanding they would be using their facilities (see for instance Pinewood Studios' recent decision to invest in small budget UK films), the key beneficiaries of this situation are probably to be found elsewhere. The small and micro-budget market (SMB) in particular offers opportunities for development of smaller, regional studio facilities more capable of providing the kind of flexibility and agility needed by this growing industry sector. This is obviously all the more true when these facilities are matched by coordination with local government in terms of developing ad-hoc incentives to attract productions. A particularly successful example of these emerging regional hotspots of production and government-led talent development that is often mentioned by professionals in the US is the state of Louisiana. The ability to attract independent production has given rise to a booming film and TV sector in the state, with an increasing number of larger productions now also moving in the region. This is precisely because of strong government incentives and the development of both a highly skilled work force and an increasing number of production facilities. The remarkable growth in local skilled labour (an increase of 400% since 2002) has also led to a similarly significant increase in local production companies investing in movies made in the state (with latest figures showing over 65% of film shot in the region now funded by local companies)[79].

Finally, one key aspect that was mentioned by everyone, though not expanded on, was the need to find ways to surf the oncoming wave of digital distribution both in terms of finding suitable ways to increase global circulation of films made outside the US-dominated distribution network, and as a potentially significant source of revenue in terms of monetising online content. This appears to confirm the widely shared agreement amongst industry professionals that this remains a business where most money is made through distribution rather than production, piracy being touted as the most obvious threat to the development of online distribution models. Despite this evident interest in addressing this thorny issue, it also emerged clearly from the consultation that, unlike production, where new models are beginning to emerge as illustrated above, solutions to distribution ills are far from being clearly identified, let alone developed and implemented.

Filmmakers' Views

The report consulted individual filmmakers from a range of filmmaking departments (from production design to editing and from sound design to producing and directing) to gather a different though complementing perspective to that of studio executives.

Filmmakers interviewed included mostly individuals at the top of their particular profession who could also offer a historical perspective in view of their many years of industry experience, having witnessed it undergoing periods of significant change before[80].

Their views can be summarised as broadly collimating with the overall outlook presented in the report in particular, once again, with regards to the importance played by tax incentives in shaping current production and studio practices.

The growing importance of the international markets was also reiterate, with many of them having already worked in non-US production environments. China was indicated as perhaps the most intriguing of countries developing greater production capacity and hence becoming more interested in attracting the kind of US filmmakers and companies that perhaps in the past were deemed too expensive for the types of productions being undertaken (a further measure of the growing confidence of markets in those countries experiencing a current economic boom).

Another point that was remarked on by several interviewees concerned the need to rethink some of the workflows currently governing production in an attempt to adapt to new technologies more effectively (both in terms of production tools and as a means to enhance networking amongst those involved in a production) as well as facilitating the creation of innovative ways to conceive the production process. One example that was quoted by several interviewees concerned what could be broadly defined as the 'process of narrative collaboration' involved in any production. Early stages of collaboration were indicated as ripe for innovation, particularly at scriptwriting stage where, in spite of the emergence of technologies facilitating collaboration across distances cheaply and easily, little collaboration amongst key department heads takes place during the scriptwriting stage of a film, leaving discussions to a later time once the script's architecture is already locked for the most part. A new approach, enabling key contributors to feedback to writers during the early stages of the scriptwriting process, so some argue, would lead to greater efficiencies throughout the production process thus improving efficiency both in qualitative terms (i.e. a better script) and quantitatively (i.e. avoiding the snowballing of early script problems into production difficulties inevitably running production costs higher).

Most of those interviewed highlighted a further issue around collaboration that is perhaps a logical extension of the previous point. This refers to the desire for greater discussion and exchanges amongst various filmmaking professions. Whilst the Guilds and other similar professional organisations offer US filmmakers an opportunity to exchange views and best practice within their profession (although to varying degrees) this is rarely the case across different departments. The result is an exacerbation of the 'working in silos' mentality that emerged already in the report in relation to studios. The Academy of Motion Pictures Arts and Sciences is in theory the designated instigator of this dialogue but most of those interviewed pointed out that this is more an aspiration than a current reality. This situation is exacerbated in other countries where the exchange of ideas and best practice is mostly, if not entirely left to individuals due to the lack of fully developed professional bodies.

Overall there is a distinct awareness of the challenges presented by the current industry situation but also of the potential opportunities for change. Issues such as new distribution opportunities and the flexibility offered by smaller, more agile productions, as well as the chance for increased collaboration and dialogue at all levels in the industry on a global scale, are routinely described as clear and present opportunities.

The Missing Links

While the consultations carried out for this report confirmed the present moment in the industry as one of transition towards models that are more flexible and agile to take into account global changes and new patterns of collaboration, production and distribution, it also highlighted some fundamental unresolved issues, especially around research and development questions. An alarmingly increasing number of major industry reports have questioned the validity of existing industry data and its analysis; the dialogue amongst filmmakers, especially between different crafts, and between filmmakers and studios continue also to remain fundamentally unstructured beyond contractual agreements, and government policies around industry support are often too generic and unfocussed as to be able to provide their desired effect. Finally, there was no evidence in any of the discussions of a well thought-out and appropriately resourced collaboration between education (academia in particular) and industry beyond the traditional ‘practical training’ support provided by specialist courses. For an industry going through a substantial and potentially very significant transformation these ‘voids’ could destabilise medium and long term industry sustainability and efficiency.

When invited to comment on these issues all those interviewed agreed with the necessity to improve the quality of data and analysis available to both studios and filmmakers, as well as the need to create better opportunities for dialogue (a point particularly dear to filmmakers). However, they also pointed out a basic problem: although studios and professionals often participate in discussions around industry issues and challenges they ultimately do not see research and analysis as part of their remit (apart from production-specific issues needing immediate technological solutions). They all agreed that this present void in terms of the availability of research-rich environments able to coordinate efforts with both studios and filmmakers so as to produce more reliable and effective research, analysis, and innovation is a major challenge they would be willing to contribute to but are not, nor are they likely to be in a position to lead.

Significantly, both executives and filmmakers agreed that academia might provide the kind of research-rich industry incubator that is so sorely missed at present as universities are in a position to establish the kind of ‘neutral space’ within which different views and ideas from both industry and scholars could be augmented with the kind of data gathering and analysis that might lead to industry solutions and innovation.

[78] Since the views expressed by executives and filmmakers who were interviewed for this report concern sensitive aspects of the practices and strategies of the studios, production companies and professional organisations in which they work in and lead this section was informed by issues of confidentiality. To ensure the validity of the views expressed, these were later triangulated with other official reports, studios documentation and other relevant publications. The comprehensive bibliography accompanying this document is a direct result of this process of validation.

[79] For more information please see the Louisiana Economic Development site for the entertainment sector at http://louisianaentertainment.gov/ and the Mayor's Office of Cultural Economy - Film New Orleans site http://www.filmneworleans.org/ (last accessed: 1 August 2011)

[80] Filmmakers interviewed include industry veterans and multiple-award winners such as Walter Murch (legendary editor and three-time Oscar winner), Randy Thom (twice-Oscar winner and Director of Sound at Skywalker Ranch), Tom Walsh (President of the Art Directors Guild of America and a leading TV and Film production designer), Gary Rydstrom (a seven-time Oscar winner and a director and member of Pixar's senior creative team)Peter Heslop (co-producer of The King's Speech) amongst many others.

Section 3 - Addressing the Research Challenge Through Research and Production Innovations: A Proposal

The present situation in the industry, and in particular the makeup of traditional studio production spaces (including large complexes housing several soundstages, office buildings, various departments and workshops, backlots, and so forth), paints a picture that is as varied as it is uncertain in its outlook. However, this situation is not without some clearly discernible developments that have emerged in this report and can help navigate this landscape.

i) Changing landscape of production patterns and investment

Current level of demands are often indicated by large studios as the rationale for large investments in building further studio footprint (Pinewood and Warner are two key examples of this). However, there are many reasons to believe this to be a short-term strategy that can only be adopted by studios that are part of larger conglomerates (Warner, Fox) or have a differentiated financial model that include ancillary and parallel markets, such as housing developments (Pinewood) or theme parks (as with Warner's Harry Potter parks). This is mostly because in these models film production is only a segment of a much wider business model where film production-generated losses can be offset against commercial advantages gained by being involved in film production (as it is the case with prestige, ancillary markets such as merchandising, global foothold and presence, etc.).

In view of the emerging availability of these kind of large production facilities in countries such as China (Hengdian World Studios), and South Africa (Atlas Studios), as well as the growth of relatively 'new' facilities in established markets (MBS Studios in LA) it would appear the industry is fast moving towards saturation of the market in terms of traditional large-scale facilities.

The current polarisation of production with blockbusters and their continuing success on one end and the low-success/high-returns attractive ratio of small budget productions on the other is increasingly seen by major studios as a model preferable to investing in medium budget movies, the increasingly higher production cost of which makes them less likely to succeed in the current market place. This situation requires a realignment of facilities and support, especially in the case of SMB productions where higher output than it is possible at present is necessary for the model to succeed. In particular, cheaper, more agile alternatives to traditional studios would appear to be the logical answer to increase output.

ii) Incentive chasing

As well as uncertainty in terms of being able to maintain current level of demands, studios face a further, complex phenomenon, commonly referred to as 'incentive chasing'. The combination of tax and government incentives and local skilled workforce has proven highly attractive to virtually all major production companies in ways that go above and beyond the lure of the facilities offered by large scale studios. Although runaway productions are hardly a new trend, the scope and complexity of incentives now available to production companies are such as to make incentive chasing a highly attractive proposition in accounting terms. This is despite the sometime very complex logistical proposition of having a film doing, for instance, pre-production in LA, production in the Czech Republic, post-production in the UK while special effects are being crafted in Canada or New Zealand (all with different local crews) due to the availability of particular tax breaks for different stages of production.

There are of course noticeable exceptions: blockbuster franchises such as Avatar (MBS, Los Angeles), Harry Potter (Leavesden, London) and The Hobbit (WETA, Wellington), where logistical consideration may still need to take precedence over financial incentives due to the complexity and long-running nature of those productions still tend to prefer to be located in a large studio complex able to offer the 'all under one roof' approach filmmakers find particularly attractive. On the other end of the spectrum, SMB productions will clearly need to balance the potentially significant financial benefit of filming in several countries with logistical considerations given the nature of their productions (by definition and necessity characterised as more agile, responding to quicker schedules and with a higher production output).

iii) Location, location, location

One common feature that unites traditional studio facilities is their geopolitical location as they are all located in or very close to large urban conurbations like Los Angeles (Fox, Warner, Paramount, etc.), London (Pinewood, Elstree, Leavesden), Berlin (Studio Babelsberg, formerly known as UFA), Rome (Cinecittà), Sydney (Fox Australia), Johannesburg (Atlas Studios) amongst others.

Less traditional, 'boutique studios' tend to be more enterprising in their location, often finding breathing space in smaller cities that are the site of significant innovation and creative clusters and/or centres of political and economic power (San Francisco and Wellington, the homes of Pixar and WETA, are perhaps the most obvious examples of this, with Belfast-based Paint Hall Studios as an interesting UK example).

Generally, this situation has had the inevitable effect of creating high-density areas of production companies, capital, availability of talent and infrastructure around capital cities with little penetration in other regions. The UK is one of the most obvious examples of this in view of London's already disproportionate hold on the economy, especially in terms of production infrastructure and capital.

This is particularly significant for SMB productions as both traditional and specialised boutique studios of the kind described above are very difficult to penetrate for small and micro budget productions, given the often congested nature of film scheduling (with some blockbusters taking over entire studios for long periods of time), the 'closed' nature of studios working exclusively on their own productions (Pixar for instance), and the high costs of renting up production space and offices (in studios such as Pinewood, Babelsberg or Cinecittà').

iv) The research void

A recent United Nation report on the Creative Industries highlighted the need for an in-depth and sustained systematic analysis of the sector to ensure policy making is well informed and not based primarily on 'assumptions' as to how the sector operates, especially in terms of its core dynamics and peculiarities that differentiates the Creative Industries from other economic and financial sectors. The film and TV industry is no exception: the need for more reliable data and sophisticated analysis of industry trends, human networks, innovation potential and talent development is arguably the most important challenge facing the industry today. Perhaps the most striking example of this can be found in the current debate around piracy. Although the MPAA, studios and filmmakers have published countless data and commentary on the matter a recent report in April 2010 by the US Government Accountability Office rebuked both the data collected and its analysis and interpretation. The report (produced for US Congressional Committees and significantly titled 'Intellectual Property - Observations on Efforts to Quantify the Economic Effects of Counterfeit and Pirated Goods) states in no uncertain terms that: 'Lack of data is the primary challenge for quantifying economic impacts of counterfeiting and piracy' and pointed the finger at both Government and Industry research as being inadequate for producing the necessary data and analysis that may bring us closer to understanding piracy and its effects.

This problem is exacerbated by the historical tendency within the industry to work in silos rather than, for instance, exchange best practice, mostly for fear of confidential information leaking to competitors. Unlike other industries, where exchanging best practice is often encouraged and seen as germane to growth, the film and television industry's approach has so far taken the shape of high profile industry 'summits' where executives gather to debate pressing issues. Examples include summits at Film Festivals (see Berlin 2010), summits organised to drum up support for particular emerging filmmaking opportunities (see the Financial Times 'Business of Film Summit held in Qatar in March 2010), VIP events centred around market opportunities and more traditional, annual events as those organised by BAFTA and Variety (e.g. BritWeek in LA). While these events are useful in terms of highlighting the key questions and identifying possible resources they are almost invariably unable to be propositional since they mostly rely on experience and personal opinion rather than in-depth research and analysis. In many ways this approach, one that some in the industry refer to as the 'DIY mentality', risks precluding collaboration on generating innovative solutions as it feeds on the notion that since 'nobody knows anything in Hollywood' then by definition one person's view is as good as the next. As it emerged from consultations with industry (see previous section for details) this is now accepted by a growing number of studios and filmmakers alike as a clear challenge to develop the kind of innovation that will be needed to ensure long term industry stability.

It is within this complex nexus of industry outlook, national and regional specificity, challenges and available resources that this report wishes to highlight the opportunity for Welbeck, The University of Nottingham-KMC and the wider Nottingham region to act as a catalyst for innovation in industry research and production as a possible petri-dish for this kind of collaborations between industry and academia.

The Nottingham PRISE Project (Production and Research Innovations for Screen Enterprises)
In consideration of the earch, data and analysis carried out in this project, and in particular the views and opinion expressed by filmmakers and executives, it is thus feasible to envisage a partnership between several key organisations and industry partners to develop Nottingham's identity as a unique nexus of research capability, support for small/micro market and radical innovation.

In this vision Nottingham would fill a particular market niche by providing the kind of ideas incubator and innovation generation that industry leaders have already identified as an attractive proposition they would be willing to support as it would address their current lack of research, analysis and development capacity. The incubator would function by attracting leading and emerging industry players to work side by side with scholars with expertise in screen industries as well as local and national industry support organisations and government, as in the case of East Midlands Media and Nottingham's City Council and County Council. The project would benefit other existing industry players in the region by offering opportunities for collaboration and scaling up of resources. The increased flow of communication and partnerships with filmmakers and studios would also generate opportunities for the development of production facilities aimed at sustaining SMB productions, with the University of Nottingham's KMC facilities and the Welbeck Estate articulating their offer across the region with the networking support of East Midlands Media (see key players below for more details).

As consultations on the idea have revealed, industry contribution would come primarily from the following groups:

a) Filmmakers - Many leading practitioners who were interviewed as part of this report highlighted the need for an ideas incubator centred around R&D where new solutions could be developed and prototyped. Particular areas of interest are around process (in all stages of the production flow, pre-production, filming and post-production), communication and collaboration across departments, sharing of best practice, upskilling (especially in terms of future industry trends) and relationships with studios;
b) Studios executives - Mirroring the opinion of filmmakers, executives expressed the view that a research-led, University-based unit like the one proposed here would potentially be of interest, especially in terms of providing R&D capability and capacity to studios to address core industry questions and challenges (as in the case of audiences, process, funding and new markets, distribution and piracy amongst many others);
c) Technology developers - Innovation and creativity will always require technology to support change. The focus of the PRISE project on process and dialogue between filmmakers, studios and scholars would enable developers to design new software and hardware solution that meet the needs of filmmakers based on direct access to those who will use it rather than in response to a perceived need or an attempt to create one;
d) Professional organisations - Guilds and other similar professional organisations would benefit from engaging with PRISE with regards to two aspects in particular: upskilling and workflows. Upskilling is essential for filmmakers to remain up to date with current developments and, more importantly, being able to foresee reliably where the industry is heading next in terms of issues such as production patterns, funding, craft remit and so forth. As for workflows, organisations of this kind would want to ensure their views inform more effectively the process of shaping new workflows, especially at a time of great technological change (an early indication of this interest is an invitation that the author of this report has received to present research findings to the Art Directors' Guild of America as a means to 'update' its 2,000 members as to the current and future trends in studio production);
e) Support organisations (e.g. advertising and marketing agencies) - There is a number of support players in the industry whose efficiency and market relevance depends essentially on their preparedness to address present and future industry trends. Companies like Create Advertising (Los Angeles, London) and RedBee (London), whose success depends on engagement with leading studios and filmmakers would thus benefit greatly from having direct access to new trends, innovations and the leading industry and academic figures at the heart of this process as a means to inform their forward planning more effectively.

In view of the interest already expressed by the constituencies above in the consultation process it is possible to identify four principal modes of engagement through which the PRISE Project would support its partners:

i. R&D and resulting innovation - research capacity aimed at identifying, analysing, developing and prototyping innovative and radical solutions to meet the specific needs and opportunities of industry partners/members as well as responding to research priorities in academia;
ii. Production - agile and affordable resources for small and micro budget productions looking for an alternative to traditional production units in and around London as well as those wishing to retain a UK base against moving production abroad;
iii. Talent development - opportunities for executives and new talent to learn about new industry trends and engage with them at an early stage as well as ad-hoc talent development programmes for interested partners. Access to student talent for internships, traineeships and employment;
iv. Resource sharing - networking industry professionals and resources to enable the retention of institutional memory, exchanges around best practice, and preservation of relevant archival materials for filmmakers, executives and scholars.

Key Partners in the Project
The project would initially be built around a cooperation between The University of Nottingham (the 'home' for the Institute of Screen Industries Research, ISIR, and the focus of research initiatives, as well as its studio facilities at the King Meadow's Campus (formerly ITV Carlton studios), Welbeck Estate (as a the key site for prototyping of new IP generated in research projects, upskilling initiatives and executive courses and as a possible prime location for film and TV shooting) and East Midlands Media (as the key organisation in the region supporting production and the filmmakers' network with many years of experience in this field).

The University of Nottingham would act as the research home of the project. One of the UK's leading Universities and with a very strong international presence (with campuses in China and Malaysia) the University can provide the project with the indispensable network of expertise and research capacity that will be essential to bring industry and academia together to collaborate on innovative research leading to radical innovation and IP generation. It houses the new Institute for Screen Industries Research, the cross-departmental unit with support from staff with particular expertise and track record in screen industries research (particularly in Film, TV and video games and narrative arts within the Faculty of Arts and Humanities), innovation and enterprise (particularly in research carried out in the Business School) and digital innovation (especially through the work carried out within Horizon - Digital Economy Hub and the School of Computer Science). The University is also home to Kings Meadow Campus (KMC), formerly ITV Carlton studios. Some of the old facilities have been redeveloped for alternative use but two studios still remain and have been utilised in the past by filmmakers for feature films, TV adverts, music videos and other productions. KMC also retains the key infrastructure necessary for small productions (e.g. access to gated areas, loading/offloading bays for large vehicle and lorries, workshops and office space). A more comprehensive profile of KMC and its facilities is available at the end of this section. Importantly, the University is also the preferred Higher Education partner of the British Film Institute, whose role in terms of providing direct industry support has been greatly enhanced since it has absorbed the remit and responsibilities previously under the purview of the UK Film Council, thus making this partnership a significant asset to the PRISE project.

The Welbeck Estate is one of the largest estates in the region (15,000 acres) on the borders of Nottinghamshire and Derbyshire, 27 miles north of Nottingham. It is currently owned and inhabited by William Parente, the grandson of the 7th Duke of Portland, and his family. Welbeck Abbey has the potential to offer three key assets to the project.

Firstly, the estate would be an ideal site for the prototyping of IP generated in the research projects. The availability of high grade office space, extensive grounds, catering and accommodation capacity, and all amenities necessary for extended stays makes it the ideal location for focussed test work around the ideas, solution and IP generated in the research phase of the project. Secondly, in terms of production opportunities for film and TV companies, the estate provides a variety of natural and built landscapes, locations and opportunities, the likes of which are rarely found (including over 150 buildings, extensive grounds with backlot potential, a number of pristine natural settings including gardens, pavilions, small bodies of water, etc.). Welbeck has already been the site of several film and TV productions: noticeably the 2010 BBC version of Macbeth and the critically acclaimed feature film Bronson (2008) were both shot on location at the estate. The estate also boasts a high-speed fibre optic broadband network thus allowing for complex communication networks to plug into wider communication systems seamlessly.
Lastly, its location with many impressive buildings and surroundings of natural beauty, as well as its secure and private setting, offer the ideal location for executive courses, corporate initiatives and other similar engagements.
The estate already operates a number of activities and services that would be perfectly tailored to filmmakers, scholars and other visitors working at the estate, including the prestigious School of Artisan Food, The Welbeck Farm Shop, The Harley Gallery (of the Harley Foundation Trust), the Dukeries Garden Centre and other craft workshops. The estate has embarked on a project to create a 'sustainable and thriving community in a setting of unique natural and architectural beauty across 250 acres of rural Nottinghamshire'[81] with the arts playing a central role in the

development of this sustainable community thus providing an organic setting for the kind of activities herein illustrated.

East Midlands Media has been the designated agency to support and foster the screen industries in the region for nearly a decade. During this time, it has built considerable capacity in terms of industry networks and brokerage, and significantly supported the emergence of new talent and innovative projects. Its extensive network of contacts, knowledge of film investment models, experience of raising film finance and track records in allowing filmmakers to plan, execute and deliver a number of film and TV projects are all key assets that would greatly benefit the PRISE project. In particular, over half of the films produced under East Midlands Media stewardship were made by new filmmakers, a clear indication of expertise in developing new talent, a cornerstone of the project. Also importantly in view of the project's emphasis on providing facilities for SMB productions, East Midlands Media has co-financed 42 feature films and fostered the production of over 100 short films. The number of accolades and awards generated by these projects (9 BAFTAS amongst others) testifies to the quality of the output and its international relevance and recognition.

A further strategically important contribution to the project that East Midlands Media would bring is their understanding and knowledge of the distribution and exhibition networks. As indicated earlier in this report, some key questions emerging from industry partners relate to 'life after production', with digital distribution, online monetisation, new audiences and modes of consumption being of particular importance making East Midlands Media's expertise in existing networks, both traditional and innovative, a strong contribution to the project.

Perhaps most significantly, East Midlands Media has in the past decade invested in the kind of activities that are central to the PRISE project, both in terms of human resources, support infrastructure and financial support. From R&D and prototype development to product delivery and marketing East Midlands Media have been at the forefront of the industry in the region and the UK, achieving considerable experience and success also at national and international level.

It is also important to note that East Midlands Media already has very good working partnerships with both Nottingham Universities, and have supported research projects in a variety of ways in the past (including this report) thus making the partnership in the project a natural development of this existing relationship.

Operational Structure

PRISE's research and development operations will centre on a four-step process:

a) consultation; b) research; c) prototyping; d) delivery.

The consultation phase focuses on the dialogue with industry and academic partners to identify what questions, issues and challenges to focus on. The aim of this phase is to decide which amongst these can be effectively addressed by PRISE, its assets and partners. The issues/challenges selected will need to meet two core criteria: i) partners identify them as being of primary importance to their operations; ii) they offer opportunities for academically relevant and innovative research. This phase is essential in ensuring access to resources in both industry (through membership funding) and academia (through research grants and other similar sources).

Following this step, the selected challenge will move into the research phase. Primarily, the research phase has three key aims. Firstly, it will develop the challenge identified in the previous phase into a fully articulated research project with clear objectives and outcomes and carry out the research accordingly. This will involve assessing the necessary resources, both human and logistical, timetabling the necessary research activities, budgeting accordingly and identifying the appropriate sources of research funding available. Secondly, it will carry out the research as agreed. Finally, it will assess the outcomes of the research, with particular attention to deliverables such as IP generation, publications, industry solutions and others.

This will lead into the prototyping phase of the project. The latter involves testing out the various outcomes. Firstly, the outcomes will be looked at and the most appropriate method(s) to prototype them identified. This will depend on the nature of the challenge and the research findings but methods that can be envisioned include: producing short test films and similar artefacts; develop ad-hoc training programmes, executive course, talent development programmes; audience testing; networking projects through web, social networks, apps; software development and others. Similarly, academic solutions will be developed in terms of conference papers, articles for publication, reports, and others. Secondly, the actual prototyping will take place and results monitored and recorded appropriately.

The final phase of each project is to deliver and, wherever appropriate, market the project outcome. This will obviously depend on the nature of the outcome and its intended audience. Examples may range from taking to studio executives a short film demonstrating the impact of a new workflow generated during the research to providing online tools (test websites/apps/etc.) to reach particular audiences. This process is essential in showing to partners not simply the outcome of the research but also its feasibility both in terms of being able to package the solution and apply it to real life scenarios.

The R&D carried out as part of PRISE should not be seen as stand-alone activity but rather as means of providing innovative solutions in all aspects of the filmmaking process that can be both returned to industry and, crucially, should also foster industry growth in the region. In particular, as the report has outlined, there is growing demand for agile and cost-effective production facilities for small and micro-budget productions. Given the existing infrastructure, both in terms of studio space and location shooting (especially at the University of Nottingham's KMC campus and at the Welbeck Estate) and the networking and industry support available (especially from East Midlands Media) it is possible to envisage the development of an articulated production offer to filmmakers. This development will be unique in the East Midlands and UK landscape and will ensure the creation of a 'modular studio complex' (MSC hereon) that would be extremely attractive to productions looking to avoid the more costly and schedule-intensive locations such as Pinewood, Elstree, Leavesden and similar larger studios.

PRISE would be able to offer filmmakers a modular production structure with two studios at KMC, as well as offices, workshop spaces and other logistical resources in the heart of Nottingham. This would serve as the base for productions filming in the region, with Welbeck estate offering the kind of variety of landscapes, buildings, natural settings and logistical support and additional production office space that would be very attractive to filmmakers. This combination of both indoor studios and locations, office spaces, proximity to major transport networks and the presence of local networked skilled workforce would place Nottingham as one of the prime centres for SMB productions in the country outside London. This combination of R&D innovative work, industry networks and contacts, and production facilities could potentially make PRISE the most innovative facility of its kind in the current landscape. Crucially, the realisation of this vision would depend more on the rationalisation of existing space, the coordination of resources across key partners and aimed investment and less on large capital investment. The creation of an Industry Advisory Board would inform the development of this complex in accordance with key project partners.

Pilot Stage of Project and Early Industry Response

We initiated a series of pilot research projects, visits to key institutions and consultation with leading filmmakers to validate the basic concepts of the project, test some of the mechanism for delivery and attract early partnerships. These activities were supported by funding from East Midlands Media, Welbeck Estate and the University of Nottingham. Initial response from industry has been very positive indeed. A number of leading filmmakers and executives have pledged their support to the project and its ultimate aims and objectives. Following these early consultations, the Institute for Screen Industries Research was created at the University of Nottingham to support future activities with particular regards to the project outlined in this report.

The following is a brief summary of this pilot stage's initial outcomes:

Pilot partnerships. We have established a number of pilot partnerships with companies and studios that represent the core constituencies identified earlier in this section. Pilot partnerships have been agreed with WETA Studios (Wellington, New Zealand), FOX Studios (Los Angeles, USA), Dolby Laboratories (San Francisco, USA), the Art Directors' Guild of America (Los Angeles, USA), Studios Babelsberg (Berlin, Germany) and others.

Industry Fellows. Several filmmakers have pledged their support to the project by agreeing to act as advisors and visit as Industry Fellows in the future. They include legendary and innovative figures in the industry, like three-time Oscar winner Walter Murch (The Godfather, Apocalypse Now, The English Patient), two-time Oscar winner Randy Thom (Forrest Gump, War of the Worlds), and seven-time Oscar winner Gary Rydstrom (Senior Creative Team at Pixar Studios, Saving Private Ryan, Titanic; industry leaders such as Ioan Allen (Sr. Vice-President, Dolby), Tom Walsh (President, Art Directors' Guild of America) and Brian Wright (Head, Talent Acquisition at Fox Group) amongst many others. Tom Walsh was also the first Industry Fellow to visit the University of Nottingham in June 2011.

Pilot research projects. The first research project took place between April-July 2011. The project addressed one of the core questions affecting the industry today, namely the role of studio production space at a time of technological and business change in the industry. This report is its key deliverable. The project was carried out as a partnership between East Midlands Media, Welbeck Estate and the University of Nottingham. In view of the continuing project potential, it has been agreed that the partnership will continue so as to enable the continuation of research activities linked to the project, especially in terms of ongoing engagement with industry partners.

ISIR, the new institute based at the University of Nottingham, has been created as a result of consultations with both colleagues and industry partners as a means to provide a 'home' for the project and related activities. It builds on key partnerships with the Business School (in particular with the Institute of Enterprise and Innovation), the School of Computer Science (in particular with Horizon, the University's £40M Digital Economy Hub), CAS - Centre for Advanced Studies and the Business Engagement Team. .

Key Challenges

As in all innovative projects there are a number of core challenges that can be identified. These will need addressing at an early stage primarily by the steering group. As a means to indicate the way forward in addressing these challenges a series of Action points are also suggested briefly below:

• Capturing seed funding for early stages of project - Action: evaluate early running cost, capture investment both internally from founding partners and externally from industry and research councils;
• Building research capacity and support for project activities - Action: ensure full representation of expertise and research capacity involved in research projects, IP generation and prototyping of results. The newly formed ISIR is the designated home for academic research support as it is a cross-departmental unit capable of attracting inter-disciplinary staff and their expertise (e.g. film and TV, business, computer science);
• Communication and administrative support (including marketing, outward facing activities) - Action: ensure representation on steering group of key University of Nottingham support such as Corporate Partnerships, Communication and Marketing, Technology Transfer;
• Developing long-term sustainability - Action: steering group (with help from newly created Business Engagement unit at University of Nottingham) to work out details of business models suggested in this report, in particular levels and conditions of membership, levels of fees, benefits linked to each level of membership, duration of membership;
• Support infrastructure/office space - Action: Welbeck and University of Nottingham to coordinate efforts to develop necessary office infrastructure and avoid duplication;
• Access to industry resources (from industry partners, such as access to archives, locations, etc.) - Action: list assets already pledged to project (e.g. Fox archives, Dolby library, ADG library and members, etc.), ensure sharing of resources is a condition of membership to the project for industry partners.

In summary, the key challenge is evidently attracting necessary seed funding to ensure resources are in place to begin running the project. This would allow the generation of early results that can be used to 'demonstrate' feasibility and effectiveness of the project. This would then be followed by the introduction of a membership fees structure to ensure sustainability. In a five year cycle, it is possible to envisage a 2+3 situation, whereby stage 1 (years 1-2) is funded by project founders (e.g. University of Nottingham, Welbeck, others) and stage 2 (3-5) is self-sustained by membership fees, possible IP licensing (including related software/hardware developed in support of new IP), additional fees income from ad-hoc degrees (e.g. a new University of Nottingham MSc in Screen Industries) developed in partnerships with industry as part of wider talent development programmes (including industry placements and internships).

Key Competitors

The kind of agile and modular structure we are proposing and the combination of traditional assets (studio space, office space) with more innovative aspects (RD work, prototyping, talent development programmes) makes this a unique proposition in the current industry landscape. Most industrial support structures revolve around either providing comprehensive production facilities or research capability based around technology development and/or data mining. It is far rarer to find structure that combine the ability to carry out innovative R&D work, largely based on human networks (filmmakers, executives, new talent, etc.), capable of generating IP that can be prototyped and returned to industry in an environment that allows this work to be carried out side by side with small and micro budget productions.

The two closest 'models' for inspiration are the Ideas Lab (Los Angeles) and MIT's Media Lab (Boston). Although both fundamentally built around technology solutions, these are research-base units that have maintained a considerable degree of agility in being able to appeal to a varied constituency in ways that have allowed them to adapt quickly to industry changes.

Significantly, while our dialogue with pilot industry partners and contacts have confirmed they are aware, and in some instance have worked with, the two units mentioned above it has also strongly indicated that neither is seen as adequately designed to provide the kind of R&D innovation that the PRISE project would focus on. This is mostly because, unlike the two examples above, the project will generate specific research questions to be addressed within the industry incubator in consultation with partners. Crucially, neither of these units offer production facilities in which to test and prototype their solutions. It is the view of those consulted in industry that this approach would ensure PRISE could deliver solutions that are relevant and implementable and the appeal of which would carry across the historical divide between studios and filmmakers thus helping develop solutions that are both financially viable and efficient while catering for the needs of filmmakers. The availability of the kind of production opportunities that the PRISE project would offer have also been very positively commented on particularly by UK-based filmmakers, with some indicating this kind of development as an attractive alternative to taking small and micro productions outside of the UK as its characteristics (affordable, agile) would offset the advantages of production incentives available in other countries.

In conclusion, there is a clear opportunity for harnessing Nottingham's industry and research potential to create a strong identity and industry presence for the region via the articulation of research capacity and expertise (University of Nottingham and possibly Nottingham Trent University), local enterprise and partnerships (Welbeck, East Midlands Media, City and County Councils) and local industry and entrepreneurial power (Welbeck and others). This would take the form of a modular structure centred around both research and production, building on existing research and production capacity, to scope out R&D innovation and SMB production opportunities to industry worldwide. This would thus respond to needs already clearly identified by several film industry executives, government and research institutions by improving quantity and quality of industry data and analysis; develop innovative talent development programmes, generate industry IP and relevant support technologies, and provide a ‘meeting space’ for industry, academia and to evolve the film industry and with government/policy makers to develop future industry policy.

[81] For further details please see http://www.welbeckproject.com/

Appendix 1: International Tax Incentives

Country	Region	Type of Incentive	%	Cap	Minimum Spend	Additional Comments
United States		1) Transferable 2) Non-transferable 3) Refundable 4) Non-refundable 5) Rebates/grants Offered as cash rebates, tax credits, or up-front/back-end production funding.	Potentially eligible for 100% of production costs.	Deduction applies to the first $15m of production costs, $20m in low-income areas		Incentives subject to change in state legislation. Film tax offices in states to offer advice. 10 states do not offer incentives. Can take advantage of more than one state's incentives. Above the line labour do not qualify. Neighbouring states in competition. 75% production must take place in US. Review date December 31st 2011.
	New York	Refundable	30	Rolling cap	No minimum spend	$2.2bn to give away over next 5 years. Offers post-production only tax credit. 75% of stage days must take place in NY. Level 1 incentive – productions above $15m, Level 2 – productions below $15m. No insurance on incentive withdrawal. Review December 31st 2014.
	Louisiana	Partially refundable, fully transferable	30	No cap	$300,000	Currently most popular state. $5.71 earned for every $1 spent. No review date.
	Georgia	Transferable	20-30	No cap	$500,000	10% extra gained by including Georgia emblem in credits. $600m spent to date. $1.25 earned for every $1 spent.
	Connecticut	Transferable	20	No cap	$100,000	Transferable 10-30% for digital animation. Annual review.
	North Carolina	Refundable	25	$20m	$250,000	Review December 31st 2011.
	New Mexico	Refundable	25	$50m rolling cap	None	No review date.
	Hawaii	Refundable	20	$8m	$200,000	Review date December 31st 2015.
	Ohio	Refundable	25-35	No cap	$300,000	No review date.

Country	Region	Type of Incentive	%	Cap	Minimum Spend	Additional Comments
United States	Michigan	Refundable, transferable	30-42	$50m	$50,000	Previously offered 40% with $50,000 minimum spend. New Governor brought in $25 million cap, raised to $50m after lobbying. Review September 30th 2011.
	Iowa	Transferable	50	No cap	No minimum spend	Suspended due to misuse until July 1st 2013
	Puerto Rico	Transferable	20	$50m	$100,000	Annual cap can be increased when incurred in a film development zone. Incentive increased to 40% for local film productions. 50% principal filming must take place in state. Review June 30th 2018.
	Florida	Transferable	20-30	Rolling cap	No minimum spend	$250m to give away over next 5 years. Can accommodate 5-6 major productions. 5% bonus for 'family-friendly' projects. 5% bonus for 'off-season' projects. Cast and crew must be greater than 50% residential, increased to 60% from 2012. Review date June 30th 2015
	California	Non-refundable, non-transferable	20-25	No cap	$1m	Last state to offer incentives. 20% offered to feature films, 25% offered to independent films and TV series. 75% production must take place in state. Review June 30th 2014.
Canada						The production company must be a Canadian taxable company with a permanent base in the province.
	Ontario	Refundable	25	No cap	C$1m	20% bonus for computer animation and special effects. No review date.
	Quebec	Refundable	25	No cap	C$1m	The production company must be a Canadian taxable company with a permanent base in QC. No review date.
	Alberta	Cash grant	20-29	C$5m	No mimum spend	Three stream options. Each can earn 1-2% bonus by employing AB residents. No review date.

Country	Region	Type of Incentive	%	Cap	Minimum Spend	Additional Comments
	Manitoba	Refundable	30	No cap	No minimum spend	25% of salaries must be paid to MB residents. 5% bonus on labour expenditures on third film shot within two year period. 5% bonus if MB resident receives Producer credit. No review date.
	Nova Scotia	Refunable	30	No cap	No minimum spend	5% bonus on labour expenditures on third film shot within two year period. Review date 2016
	Saskatewan	Refundable	25-45	No cap	No minimum spend	5% bonus for >50% principal photography shot in SK. 5% bonus for hiring a certain % of SK residents. 25% of salaries must be paid to SK residents. No review date.
	British Columbia	Refundable	33	60% qualifying labour	C$1m	17.5% additional bonus for digital animation and special effects. No review date.
United Kingdom		Cash rebate	20-25	No cap		UK production company must be used. 25% of core expenditure in the UK. No review date. Must pass cultural test.
	London					Film London
	Yorkshire					Screen Yorkshire – covering Yorkshire and the Humber region.
	South					Screen South – covering Berkshire, Buckinghamshire, Sussex, Hampshire, Isle of Wight, Kent, Middlesex, Oxfordshire, Surrey.
	East Midlands and East					East Midlands Media – covering Derbyshire, Leicestershire, Lincolnshire, Northamptonshire, Nottinghamshire, Rutland, plus East counties

Country	Region	Type of Incentive	%	Cap	Minimum Spend	Additional Comments
	North East			£2.4m Max. £250,000 per project		Northern Film & Media – covering Tyne and Wear, Country Durham, Cleveland, Northumberland, Newcastle Upon Tyne.
	North West					Vision+Media – covering Manchester, Cheshire, Cumbria, Merseyside, Lancashire, Liverpool, South Yorkshire.
	South West			£2m		South West Screen – Cornwall, Devon, Dorset, Somerset, Gloucestershire, Swindon, Plymouth, Torbay, Bournemouth, Poole, Wiltshire.
	Wales					Wales Screen Commission
	Scotland			£450,000 per project		Scottish Screen
	N. Ireland			25% of total budget or £800,000 per project		Northern Ireland Screen
Europe						
	Germany	Cash grant	20	€60m	€1m	German production company or established used. Review date December 31st 2012
	France	Refundable	20	€4m (per project)	€1m	French company line producing the project. Review date December 31st 2012
	Italy	Cash grant	25	€5m (per project), 60% of overall budget	Varies according to region	Italian executive producing company. Must pass a cultural test. Review date June 30th 2011

Country	Region	Type of Incentive	%	Cap	Minimum Spend	Additional Comments
	Czech Republic	Cash rebate	20	$19m	$720,000	Employment of registered CZ income tax players (producer or co-producer) with a place of business in the CZ.
Latin America						
	Argentina					
	Brazil					
	Columbia					
Carribean						
	Dominican Republican	Transferable	25	No cap	$500,000	Minimum 10% employment of DO residents in first 3 years, 20% (next 2 years), 25% (in the 6th year). No review date.
	Jamaica	Cash rebate	16.5			Investment allowance of 70% of total production expenditure.
	Cayman Islands	Cash rebate	20-30	$2m	$150,000	To be reviewed at the end of the year.
	Trinidad & Tobago	Cash rebate	12.5-30	$30,000	$1m	Annual review.
South Africa						
		Cash rebate	15	R20m	R12m	SA production company must be used. 50% of principal photography for a minimum of 4 weeks. Review date December 31 2013.
New Zealand		Cash grant	15-40	No caps	NZ$15m	Large Budget Screen Production (LBSP) and Post, Digital, Visual Effects Production (PDV), Screen Production Incentive Fund (SPIF). Must use an NZ resident company or a foreign corporation operating with a fixed establishment in NZ. Review due 2011

Glossary (Source: Entertainment Partners)

Refundable Tax Credits: “Refunds are provided by Tax Authorities once the Production Company has filed an income tax return. The refundable credit consists of excess production credits remaining after all income taxes are paid, and are received regardless of owning any income tax liability.”

Transferable Tax Credits: “Non-refundable tax credits, which if not used to offset the Production Company’s income tax liability, the Production Company is allowed to sell the tax credits directly to local tax players, or indirectly through brokers.”

Rebates: “Funds paid to the Production Company, directly from the respective domestic or international film office, and are typically not administered by the respective domestic international Tax Authorities, and are not processed through income tax returns.”

Appendix 2 - Studios: Profiles and Details

Studios are profiled in the following pages as follows:

1. Atlas Studios - Johannesburg, South Africa
2. Cinecittà' Studios - Rome, Italy
3. Fox Studios - Los Angeles, USA
4. Paint Hall Studios - Belfast, Northern Ireland
5. Pinewood Studios - London, England
6. Pixar Studios - San Francisco (Emeryville), USA
7. Studios Babelsberg - Berlin, Germany
8. Warner Bros. - Los Angeles, USA
9. WETA - Wellington, New Zealand

Also profiled here are the two intended facilities for the PRISE project:
1. Kings Meadow Campus - University of Nottingham, England
2. Welbeck Estate - Worksop, England

Atlas Studios

Johannesburg, South Africa

What they say

Service, Passion, Affordability, Creativity & Excellence

General Information

Atlas Studios is an independent studio facility which was established in 2002.
Due to the distinctive environment, Atlas is also a popular venue for a variety of corporate and social events.
As an established industry player, Atlas has a good track record of TV productions, commercials, corporate videos and special events."

Location

- On-site parking
- 7 studios on self contained lot
- Gauteng province; smallest (16,548 sqm) contributes 33% to national economy, 10% to continent
- Milpark suburb
- SABC & AFDA Film Schools - Johannesburg city centre, 5 miles
- Sprawling urban area linked by highway interchanges

Transport

- Surrounded by two freeways
- O. R. Tambo International Airport, 19 miles
- Car rental services
- Public transport services; metro, local and national bus services - Restricted pedestrian access

Tax Relief

Gauteng Film Commission
- Cash rebate
- 15% of qualifying local spend - Minimum local spend; R12,000,000
- 50% of principal photography must be local for minimum of 4 weeks
- 2011/2012 cap; R268,873,000 - Review date; December 31st 2013

Facilities

Condour; "high-end digital post-production boutique"
Atlas Studios caters for:

Television Production | Feature Films | Fashion Shows | Commercials | Awards Evenings Corporate Parties | Conferences | Theatre Productions | Concerts | Exhibitions | Product Launches | Car Launches | Year End Events

Johannesburg facilities;
- Knight Studios, photography & film
- Killarney Studios; film
- Phoenix Studios; green screen, film & photography
- Q Studios; television, film & photography
- Revive Productions
- Refinery Post Production
- Rockin' Post Production
- FiX Post Production
- Riot Post Production
- Ian Morgan
- 3D Tree

Checklist

3D cinema systems	No
3D production services	No
Animation production	No
Audience research supply	No
Broadcast satellite services	Yes
Broadcast equipment hire sale	Yes
Camera equipment hire sale	Yes
Casting services	Yes
Construction services	No
Construction supplies	Yes
Construction scenery	Yes
Courier freight services	No
Crane plant hire	No
Creative services	Yes
Crewing services	Yes
Drapes	No
Film commission liaison	No
Film stock	Yes
Grip equipment hire sale	Yes
Accommodation hotels	No
Accommodation services	No
Agents	No
Associations organisations	No
Car coach hire	No
Catering	No
Chauffeur services	No
Childcare	No
Computer services	No
Drivers unit	No
Dry cleaning laundry	Yes
Event management	Yes
Financial services	No
Fire safety services	Yes
Health safety services	Yes
Insurance services	Yes
Leisure entertainment	No
Marketing services	No
Medical support services	No
Music libraries	Yes
Office supplies	No

Personal development	No
Personal trainers	No
Phones / mobiles / walkie-talkies	No
Photocopying	No
Photographers / photographic services	No
Publications	No
Restaurants	No
Hair / makeup	Yes
Lighting equipment hire sale	Yes
Location facilities	No
Location facilities security	No
Modelmakers creative effects	No
Motion capture	No
Motion control	No
Multimedia production	Yes
Product placement	No
Production companies	Yes
Production design	Yes
Props / firearms / weaponry	No
Props general	No
Rigging / scaffolding equipment	Yes
Sound equipment hire sale	Yes
Special *fx* / atmospherics / pyrotechnics	No
Special *fx* / makeup / prosthetics	No
Stock shots libraries research	No
Soundstages	Yes - 5
Largest stage (sq. feet)	6,247
Water filming facilities	Yes
Water tanks	No
Underwater stage	No
Exterior lot location filming	No
Location filming	No
Acres	0
Number of studios	7
Number of backlots	0
Waste management	No
Film laboratories	Yes
Postproduction	Yes
Postproduction audio	Yes
Production services audio	Yes

Postproduction editing equipment hire	Yes
Production services video	Yes
Software services	Yes
Specialist services	No
Foley ADR services	Yes
Preview theatres	Yes
Cutting rooms	Yes
Costume	Yes
Paintshop	No
Aerial facilities	No
Animals	No
Signs graphics	No
Taxi services	No
TV satellite cable broadcasters	Yes
Underwater marine services	No
Video conferencing	No

Cinecittà

Rome, Italy

What they say

The factory of dreams

"Cinecittà is the largest film and television production facility in continental Europe and it's part of one of the biggest production communities in the world, second only to Hollywood. More than 3,000 productions have been made on our lot."

General Information

Cinecittà Studios in Rome opened in 1937 by Benito Mussolini.
It reached the peak of its fame and production output in the 1950s and 1960s when it became known as "Hollywood on the Tiber" due to the high number of big Hollywood films, such as Ben Hur, that were made on the lot.

Key studio lots ...
Cinecittà
- Self-contained studio complex
- 25 acre backlot
- 2,000 acre ranch on the outskirts of Rome
Dino
- 5 studios on 37 acre plot
- 175 acres of surrounding backlot
Umbria
- 3 stages complete with water tank - Blue and green screens -
Studio employs 250 people
- Surrounding creative community, 5000 people
- Cinecittà uses public-owned buildings
- One of the biggest production communities in the world - Opening to public tours from April 2011
- Cinecittà World opening 2014, including a theme park

Location

Cinecittà

- Rome city centre, 5.5 miles

Dino

- Rural surroundings
- Rome city centre, 20 minutes

Umbria

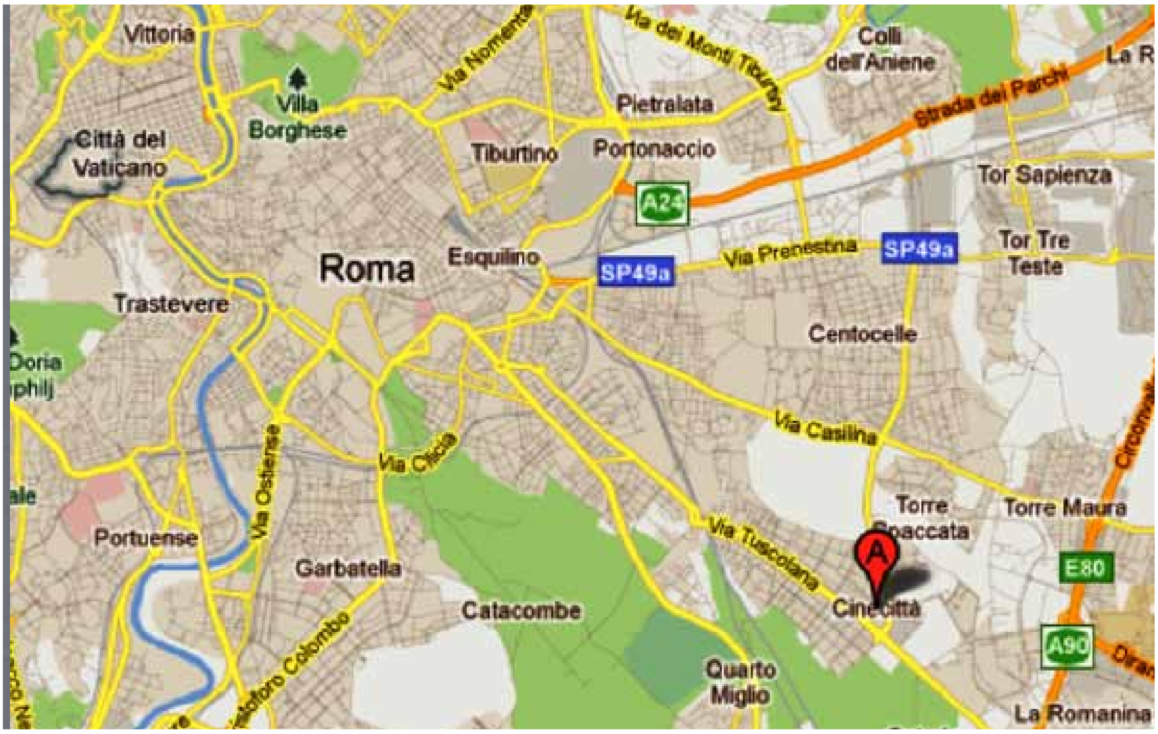
- Terni,
- Rome city centre, 62 miles - Neighbouring village of Papigno
- Close to Marmore Waterfalls

Ouarzazate

- Morocco

Transport

- Leonardo Da Vinci International Airport, 40 minutes
- Ciampino Regional Airport, 15 minutes
- Ring round surrounding studio
- Public transport services; subway



Tax Relief

- Tax credit incentive
- 25% credit to Italian executive producer
- Minimum local spend
- Cultural test
- 5m cap
- Must use Italian executive producing company

Facilities

Digital Factory:

Developing of 35 and 16 mm | Analogic and digital color grading | High volume 35 mm prints High Definition dailies | Digital Intermediate | Digital Visual Effects Digital | Wire removal Electric Titling | Standard Definition and High Definition Mastering Stereiscopic Post Production (3D) | Digital Restoration Translation and adaptation of dialogues | Artistic Direction and Voice Talent cast Dubbing Sound and Video Editing Mix | Optical negative transfers to Dolby SR/SRD, DTS Sound and Video digital delivery | 2D and 3D Projection and Screening rooms Sound and Video restoration 35mm Prints | Noise Editing, click and pop reduction, equalizing

Checklist

3D cinema systems	Yes		Personal development	Yes
3D production services	Yes		Personal trainers	No
Animation production	Yes		Phones/mobiles/walkie-talkies	Yes
Audience research supply	No		Photocopying	Yes
Broadcast satellite services	Yes		Photographers/photographic services	Yes
Broadcast equipment hire sale	Yes		Publications	Yes
Camera equipment hire sale	Yes		Restaurants	Yes
Casting services	Yes		Hair/makeup	Yes
Construction companies	Yes		Lighting equipment hire sale	Yes
Construction supplies	Yes		Location facilities	Yes
Construction scenery	Yes		Location facilities security	Yes
Courier freight services	Yes		Modelmakers creative effects	Yes
Crane plant hire	Yes		Motion capture	Yes
Creative services	Yes		Motion control	Yes
Crewing services	Yes		Multimedia production	Yes
Drapes	Yes		Product placement	Yes
Film commission liaison	Yes		Production companies	Yes
Film stock	Yes		Production design	Yes
Grip equipment hire sale	Yes		Props/firearms/weaponry	Yes
Accommodation hotels	Yes		Props general	Yes
Accommodation services	Yes		Rigging/scaffolding equipment	Yes
Agents	Yes		Sound equipment hire sale	Yes
Associations organisations	Yes		Special *fx*/atmospherics/pyrotechnics	No
Car coach hire	Yes		Special *fx*/makeup/prosthetics	No
Catering	Yes		Stock shots libraries research	No
Chauffeur services	Yes		Soundstages	Yes - 26-30
Childcare	No		Largest stage (sq. feet)	31,301
Computer services	Yes		Water filming facilities	Yes
Drivers unit	Yes		Water tanks	5
Dry cleaning laundry	Yes		Underwater stage	1
Event management	Yes		Exterior lot location filming	Yes
Financial services	Yes		Location filming	Yes
Fire safety services	Yes		Acres	2,000
Health safety services	Yes		Number of studios	5
Insurance services	Yes		Number of backlots	200 acres
Leisure entertainment	Yes		Waste management	Yes
Marketing services	Yes		Film laboratories	Yes
Medical support services	Yes		Postproduction	Yes
Music libraries	Yes		Postproduction audio	Yes
Office supplies	Yes		Production services audio	Yes

Postproduction editing equipment hire	Yes
Production services video	Yes
Software services	Yes
Specialist services	Yes
Foley ADR services	Yes
Preview theatres	Yes
Cutting rooms	Yes
Costume	Yes
Paintshop	Yes
Aerial facilities	Yes
Animals	0
Signs graphics	Yes
Taxi services	Yes
TV satellite cable broadcasters	Yes
Underwater marine services	Yes
Video conferencing	Yes

Fox Studios

Los Angeles, California

What they say

"A fully-integrated 50+ acre facility with the diversity to accommodate full-length features, special events, sitcoms, commercials, music videos, still shoots and a variety of other projects."

General Information

Fox is one of the six major American film studios as of 2011.

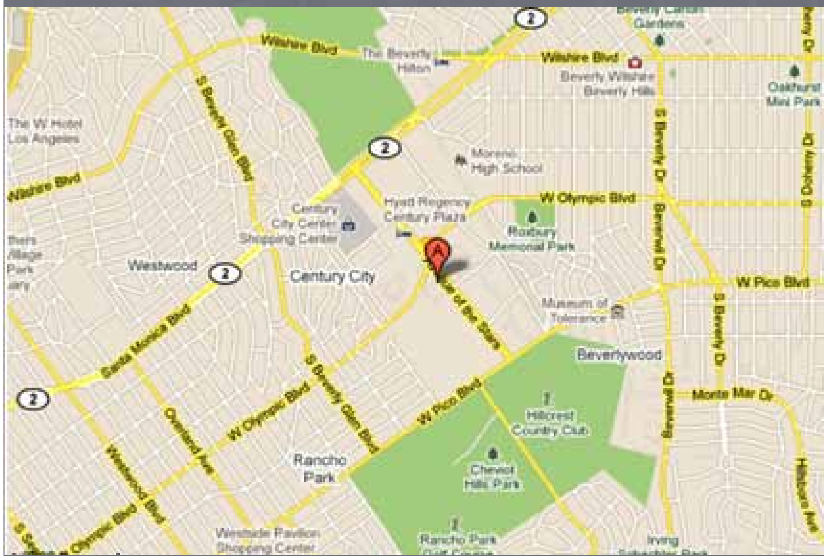
Fox was founded in 1913 by William Fox and has been bought and resold many times since. The studio is now owned by Rupert Murdoch's News Corporation which also owns the Fox Television network.

Fox is comprised of many divisions: 20th Century Fox Films, 20th Century Television, Fox 2000, Fox Searchlight, Fox Television Studios, 20th Century Fox Animation, 20th Television, 20th Century Fox Home Entertainment, Fox Cable Networks.

Fox Searchlight Pictures, established in 1994, is the prestige film division of Fox Filmed Entertainment alongside the larger Fox studio 20th Century Fox. It specializes in independent and British films, alongside dramedy and horror as well as non-English-language films, and is variously involved with the production and/or distribution of these films. Fox Searchlight has been very successful in the recent past with hits such as "Juno" and "Slumdog Millionaire". Success has been due in part to their intelligent acquisitions at film festivals and strict budgeting requirements.

Location

- Located in Century City, West Los Angeles and Sydney, Australia.
- Los Angeles business region; houses law firms and executives, most involved with film & television industries
- Close proximity to Creative Artists Agency (CAA)
- Westfield shopping mall - Hotel facilities
- Surrounding areas; Westwood, Rancho Park, Cheviot Hills, Beverlywood, Beverly Hills



Transport

- Public transport facilities; bus, metro, taxi service
- Car park
- Los Angeles International Airport, 9 miles
- Fox Transportation Department; lifts and condors, shuttle bus service, air freight department, 3- axle tractors, production vehicles (SUVs & mini-vans, crew cab trucks & state trucks, 5 & 10 ton grip & electrical trucks)

Tax Relief

- California Film Commission (CFC) allocates $100 million of tax credits each year
- $10 million of which is reserved for independent productions
- To be eligible, a feature film must have a budget between $1 million and $75 million
- To be eligible, an independent film must have a budget between $1 million and $10 million
- Qualified independent films are eligible to receive 25% tax credit

Facilities

Fox Studios Construction Services is comprised of Metal and Props Shop, ready to fabricate specialty pieces or assist with special effects rentals   Mill and Moulding, currently offering an inventory of over 200 wood mouldings   Sign Shop, with everything from hand- lettering to large format digital printing   Staff Shop , for vacuumform, resin, plaster, foam and fiberglass needs.

Checklist

3D cinema systems	No	Personal development	No
3D production services	No	Personal trainers	Yes
Animation production	Yes	Phones/mobiles/walkie-talkies	No
Audience research supply	No	Photocopying	Yes
Broadcast satellite services	Yes	Photographers/photographic services	No
Broadcast equipment hire sale	Yes	Publications	No
Camera equipment hire sale	Yes	Restaurants	Yes
Casting services	Yes	Hair/makeup	No
Construction companies	No	Lighting equipment hire sale	Yes
Construction supplies	Yes	Location facilities	No
Construction scenery	Yes	Location facilities security	No
Courier freight services	Yes	Modelmakers creative effects	Yes
Crane plant hire	No	Motion capture	No
Creative services	Yes	Motion control	No
Crewing services	No	Multimedia production	No
Drapes	Yes	Product placement	No
Film commission liaison	No	Production companies	No
Film stock	No	Production design	No
Grip equipment hire sale	Yes	Props/firearms/weaponry	No
Accommodation hotels	No	Props general	No
Accommodation services	No	Rigging/scaffolding equipment	Yes
Agents	No	Sound equipment hire sale	Yes
Associations organisations	No	Special *fx*/atmospherics/pyrotechnics	No
Car coach hire	Yes	Special *fx*/makeup/prosthetics	No
Catering	Yes	Stock shots libraries research	No
Chauffeur services	No	Soundstages	Yes - 11-15
Childcare	No	Largest stage (sq. feet)	28,274
Computer services	No	Water filming facilities	Yes
Drivers unit	Yes	Water tanks	Yes
Dry cleaning laundry	Yes	Underwater stage	No
Event management	No	Exterior lot location filming	Yes
Financial services	No	Location filming	None
Fire safety services	No	Acres	50+
Health safety services	No	Number of studios	2
Insurance services	No	Number of backlots	10
Leisure entertainment	No	Waste management	Yes
Marketing services	Yes	Film laboratories	Yes
Medical support services	No	Postproduction	Yes
Music libraries	Yes	Postproduction audio	Yes
Office supplies	No	Production services audio	Yes

Postproduction editing equipment hire	Yes
Production services video	No
Software services	Yes
Specialist services	Yes
Foley ADR services	Yes
Preview theatres	Yes
Cutting rooms	Yes
Costume	Yes
Paintshop	Yes
Aerial facilities	No
Animals	No
Signs graphics	Yes
Taxi services	Yes
TV satellite cable broadcasters	Yes
Underwater marine services	Yes
Video conferencing	Yes

The Paint Hall

Northern Ireland, UK

What they say

"I'd choose to film in Northern Ireland rather than London. It is much more equipped to deal with filming now and it's user friendly. The Americans love the convenience, our director [David gordon Green] bought a bike and cycled to work in the morning. Plus if we shot in London the budget would have been $60 million." Mark Huffman, Northern Irish producer of Your Highness.

General Information

The Paint Hall Studio is currently Northern Ireland's only film studio facility. Built for Harland and Wolff, the Paint Hall was originally used for painting ships including the Titanic. It now operates as an alternative studio offering considerable space for productions. The facility also offers a suite of offices, toilets, five dedicated workshops, a green room and has its own internal electrical substation.

The studio was used from July - October 2007 by Walden Media and Playtone Productions for the children's fantasy sci-fi adventure film City of Ember and by Universal Pictures from July - November 2009 for the medieval comedy Your Highness. It is also home to Series Yes of HBO's Game of Thrones.

While housing only soundstages on site, Paint Hall studios has easy access to all of Northern Ireland filming facilities due to a localised studio community.

Location

Belfast Northern Ireland - 8 acre site

Nearby:
- Titanic Museum
- Science Park
- Premier Inn Hotel
- University buildings
- Odyssey Arena
- Odyssey Complex; night clubs, restaurants, W5 Museum
- Local housing & flats
- Londonderry; City of Culture 2012 - Very close proximity to Belfast city centre, (5 minutes walk).

Transport

- On-site studios connected by an internal road and streets
- Belfast International Airport, 4.3 miles
- Belfast City Centre,
- Surround by motorway
- Car, boat, plane, pedestrian access - Public transport services; bus
- Car parking

Tax Relief

- In addition to UK tax relief, the Northern Ireland Regional Screen Fund can invest up to £800,000. up to a maximum of 35% of the overall production budget
- Productions must meet a 5:Yes ratio spend of the budget in Northern Ireland
- MEDIA 2007 offer special fund to European audiovisual projects until 2013

Economic Impact

- Minimal Studio facilities on site requires hiring of external filming services which benefits local businesses and film communities.
- Gentrification of Belfast's Titanic Quarter
- "Your Highness" contributed approximately £10 million to Belfast's economy by using local creative services and other amenities.
- Gradual professionalisation of the creative community

Facilities

Paint Hall does not offer post-production services on site but has easy access to all of Northern Ireland's services due to a localised filmmaking community.

Checklist

3D cinema systems	Yes	Personal development	Yes
3D production services	Yes	Personal trainers	Yes
Animation production	Yes	Phones/mobiles/walkie-talkies	Yes
Audience research supply	Yes	Photocopying	Yes
Broadcast satellite services	Yes	Photographers/photographic services	Yes
Broadcast equipment hire sale	Yes	Publications	Yes
Camera equipment hire sale	Yes	Restaurants	Yes
Casting services	Yes	Hair/makeup	Yes
Construction companies	Yes	Lighting equipment hire sale	Yes
Construction supplies	Yes	Location facilities	Yes
Construction scenery	Yes	Location facilities security	Yes
Courier freight services	Yes	Modelmakers creative effects	Yes
Crane plant hire	Yes	Motion capture	Yes
Creative services	Yes	Motion control	Yes
Crewing services	Yes	Multimedia production	Yes
Drapes	Yes	Product placement	No
Film commission liaison	Yes	Production companies	Yes
Film stock	Yes	Production design	Yes
Grip equipment hire sale	Yes	Props/firearms/weaponry	Yes
Accommodation hotels	Yes	Props general	Yes
Accommodation services	Yes	Rigging/scaffolding equipment	Yes
Agents	Yes	Sound equipment hire sale	Yes
Associations organisations	Yes	Special *fx*/atmospherics/pyrotechnics	Yes
Car coach hire	Yes	Special *fx*/makeup/prosthetics	Yes
Catering	Yes	Stock shots libraries research	Yes
Chauffeur services	Yes	Soundstages	Yes - 4
Childcare	Yes	Largest stage (sq. feet)	16, 000, 90ft
Computer services	Yes	Water filming facilities	Yes
Drivers unit	Yes	Water tanks	No
Dry cleaning laundry	Yes	Underwater stage	No
Event management	Yes	Exterior lot location filming	Yes
Financial services	Yes	Location filming	N. Ireland
Fire safety services	Yes	Acres	Extensive
Health safety services	Yes	Number of studios	1
Insurance services	Yes	Number of backlots	5,196sq miles
Leisure entertainment	Yes	Waste management	Yes
Marketing services	Yes	Film laboratories	Yes
Medical support services	Yes	Postproduction	Yes
Music libraries	Yes	Postproduction audio	Yes
Office supplies	Yes	Production services audio	Yes

Postproduction editing equipment hire	Yes
Production services video	Yes
Software services	Yes
Specialist services	No
Foley ADR services	Yes
Preview theatres	Yes
Cutting rooms	Yes
Costume	Yes
Paintshop	Yes
Aerial facilities	Yes
Animals	Yes
Signs graphics	Yes
Taxi services	Yes
TV satellite cable broadcasters	Yes
Underwater marine services	Yes
Video conferencing	Yes

Pinewood Studios
buckinghamshire, England

PINEWOOD STUDIOS
SHEPPERTON STUDIOS
TEDDINGTON STUDIOS
PINEWOOD

What they say

"The home of world class film, television and commercial production facilities."

General Information

Pinewood, Shepperton, Teddington Studios Buckinghamshire, England

Pinewood Shepperton plc's goals are:
- to continue to create the UK's leading film, television and media destination and to enhance our brand heritage
- for our customers' expectations to be exceeded through our commitment to professionalism, quality of service and offering sustainable advantage
- to increase value for all our stakeholders

Pinewood has recently been bought over by The Peel Group and is now investing in Project Pinewood. Project Pinewood will comprise a purpose-built living and working community for film, television and the creative industries. Located next to and linked with Pinewood Studios.

Economic Impacts

- 630 full-time jobs (increasing to 960 by 2022)
- Location for new businesses & training opportunities
- Primary school
- Multi-purpose community facility - Health facility
- Local retail provision
- Building on green-belt land
- Low carbon project
- Minimise unsustainable travel
- Public spaces
- 1500 homes to be built

Location

Studio locations include - U.S.A - Los Angeles, Canada - Toronto, Germany - Berlin, Hamburg, Malaysia - Iskandar, Dominican Republic - Indomina

UK
- London, 23 miles
- South Bucks District Council
- Iver Heath, adjacent village
- Rural countryside surrounding - Regional Screen Agency; Screen South
- Black Country Park
- Houses 300 independent companies on site - 007 stage, largest in Europe

Transport

- Heathrow Airport, 8 miles away - Situated between M40 and M4 motorways
- Easy access to M25
- Soho, 20 miles away
- Free studio shuttle bus to Uxbridge tube station & Slough - On-site parking
- Public transport; train, tube, taxi services

Tax Relief

- Films under £20 million; tax rebate of up to 25%
- Films over £20 million; tax rebate of up to 20%
- Must qualify on The Cultural Test

Facilities

Sound Re-Recording | Sound Design | Foley recording and editing | ADR | Optical Transfer | Avid Solutions | Broadcast Equipment Rental | Motion Control | Video Post Production | Audio and Video Duplication | Digital film scanning | Telecine | Picture and Sound Restoration | Visual Effects Design (2D and 3D) | Film Stock & Labs | Grading | Digital Intermediate Facilities | Physical SFX | Post Production Management | Music Composition | Music Scoring

Checklist

3D cinema systems	Yes	Personal development	Yes
3D production services	Yes	Personal trainers	Yes
Animation production	Yes	Phones/mobiles/walkie-talkies	Yes
Audience research supply	Yes	Photocopying	Yes
Broadcast satellite services	Yes	Photographers/photographic services	Yes
Broadcast equipment hire sale	Yes	Publications	Yes
Camera equipment hire sale	Yes	Restaurants	Yes
Casting services	Yes	Hair/makeup	Yes
Construction companies	Yes	Lighting equipment hire sale	Yes
Construction supplies	Yes	Location facilities	Yes
Construction scenery	Yes	Location facilities security	Yes
Courier freight services	Yes	Modelmakers creative effects	Yes
Crane plant hire	Yes	Motion capture	Yes
Creative services	Yes	Motion control	Yes
Crewing services	Yes	Multimedia production	Yes
Drapes	Yes	Product placement	Yes
Film commission liaison	Yes	Production companies	Yes
Film stock	Yes	Production design	Yes
Grip equipment hire sale	Yes	Props/firearms/weaponry	Yes
Accommodation hotels	Yes	Props general	Yes
Accommodation services	Yes	Rigging/scaffolding equipment	Yes
Agents	Yes	Sound equipment hire sale	Yes
Associations organisations	Yes	Special *fx*/atmospherics/pyrotechnics	Yes
Car coach hire	Yes	Special *fx*/makeup/prosthetics	Yes
Catering	Yes	Stock shots libraries research	Yes
Chauffeur services	Yes	Soundstages	Yes - 31-35
Childcare	Yes	Largest stage (sq. feet)	59,092
Computer services	Yes	Water filming facilities	Yes
Drivers unit	Yes	Water tanks	12
Dry cleaning laundry	Yes	Underwater stage	1
Event management	Yes	Exterior lot location filming	Yes
Financial services	Yes	Location filming	Formal locations
Fire safety services	Yes	Acres	Over 7
Health safety services	Yes	Number of studios	7
Insurance services	Yes	Number of backlots	7,100 acres
Leisure entertainment	Yes	Waste management	Yes
Marketing services	Yes	Film laboratories	Yes
Medical support services	Yes	Postproduction	Yes
Music libraries	Yes	Postproduction audio	Yes
Office supplies	Yes	Production services audio	Yes

Postproduction editing equipment hire	Yes
Production services video	Yes
Software services	Yes
Specialist services	Yes
Foley ADR services	Yes
Preview theatres	Yes
Cutting rooms	Yes
Costume	Yes
Paintshop	Yes
Aerial facilities	Yes
Animals	Yes
Signs graphics	Yes
Taxi services	Yes
TV satellite cable broadcasters	Yes
Underwater marine services	Yes
Video conferencing	Yes

Pixar Studios

Emmeryville, San Francisco

What they say

To combine proprietary technology and world-class creative talent to develop computer-animated feature films with memorable characters and heartwarming stories that appeal to audiences of all ages.

General Information

"Pixar Animation Studios is an Academy Award-winning computer animation studio with the technical, creative and production capabilities to create a new generation of animated feature films, merchandise and other related products.

Pixar began in 1979 as the Graphics Group, part of the Computer Division of Lucasfilm before it was acquired by Apple co-founder Steve Jobs in 1986
On January 24, 2006, Pixar entered into an agreement with The Walt Disney Company to merge the two companies. Pixar is now a wholly-owned subsidiary of The Walt Disney Company."

Pixar Shorts
"Beginning with 'A Bug's Life', Pixar has created extra content for each of their films that is not part of the main story. For their early theatrical releases, this content was in the form of "movie outtakes" and appeared as part of the movie's credits. For each of their films since 'Monsters, Inc.' ('Finding Nemo' and 'Toy Story 3' excluded), this content was a short made for the cinematic & DVD release of the film. Pixar's short films have won nine Academy Awards."

Location

Emmeryville - California, Vancouver - Canada, - Seattle, Washington.

Main Studio located in western Alameda County - Between the cities of Berkeley and Oakland

- San Francisco Bay, 11 miles
- One office building, approx. 218,000 sq. ft
- Staff employment, 625
- On-site parking spaces, 532
- Vancouver lot, 20,000 sq. ft

Transport

- Amtrak train station, 1 mile
- San Francisco International Airport, 25 miles
- Oakland International Airport, 10 miles
- Bicycle routes
- Eight bus routes surrounding Pixar campus
- Surrounded by three Inter-state freeways
- ‘Emery Go-Round’, free shuttle bus service for residents, partly funded by Pixar

PIXAR
SHORT FILMS

Tax Relief

- Pixar Canada - British Columbia Tax Incentives;
- Pixar Canada - Digital animation or Visual Effects; 17.5% - Pixar US - 'Body of Proof' program: non-refundable tax credit of 20% for films (with an additional 5% offered to independent productions and television series)

Facilities

RenderMan software;
- specifically engineered to meet the demands of rendering 3D animation and visual effects.
- RenderMan has evolved to become the gold standard for the VFX industry, used everywhere by studios large and small to create outstanding graphics for feature films and broadcast television.
- RenderMan has been used on every Visual Effects Academy Award Winner of the past 15 years, and 47 out of the last 50 nominees for Visual Effects.

Features include:

Performance | Motion Blur & Depth of Field | Fur & Hair | Displacements | Memory Efficiency
Camera Controls | Particles | Curve Rendering | Volume Rendering | High Quality
Deep Shadows | Hierarchical Subdivision Surfaces | Global Illumination | Ray Tracing
Co-Shaders | Secondary Outputs | Pixar's Brick Maps | Pixar's Organized Point Clouds
Unlimited Threading | PTex Support | Subsurface Scattering

Checklist

3D cinema systems	Yes		Personal development	Yes
3D production services	Yes		Personal trainers	No
Animation production	Yes		Phones/mobiles/walkie-talkies	No
Audience research supply	No		Photocopying	Yes
Broadcast satellite services	No		Photographers/photographic services	No
Broadcast equipment hire sale	No		Publications	No
Camera equipment hire sale	No		Restaurants	Yes
Casting services	Yes		Hair/makeup	No
Construction companies	No		Lighting equipment hire sale	No
Construction supplies	No		Location facilities	No
Construction scenery	No		Location facilities security	No
Courier freight services	No		Modelmakers creative effects	Yes
Crane plant hire	No		Motion capture	Yes
Creative services	Yes		Motion control	No
Crewing services	Yes		Multimedia production	Yes
Drapes	0		Product placement	No
Film commission liaison	No		Production companies	No
Film stock	No		Production design	Yes
Grip equipment hire sale	No		Props/firearms/weaponry	No
Accommodation hotels	No		Props general	Yes
Accommodation services	No		Rigging/scaffolding equipment	No
Agents	No		Sound equipment hire sale	No
Associations organisations	No		Special *fx*/atmospherics/pyrotechnics	No
Car coach hire	No		Special *fx*/makeup/prosthetics	No
Catering	Yes		Stock shots libraries research	No
Chauffeur services	No		Soundstages	No
Childcare	No		Largest stage (sq. feet)	N/A
Computer services	Yes		Water filming facilities	No
Drivers unit	No		Water tanks	No
Dry cleaning laundry	No		Underwater stage	No
Event management	No		Exterior lot location filming	No
Financial services	No		Location filming	No
Fire safety services	Yes		Acres	No
Health safety services	Yes		Number of studios	2
Insurance services	No		Number backlots	No
Leisure entertainment	Yes		Waste management	No
Marketing services	No		Film laboratories	Yes
Medical support services	No		Postproduction	Yes
Music libraries	Yes		Postproduction audio	Yes
Office supplies	Yes		Production services audio	Yes

Postproduction editing equipment hire	No
Production services video	Yes
Software services	Yes
Specialist services	No
Foley ADR services	Yes
Preview theatres	Yes
Cutting rooms	No
Costume	0
Paintshop	0
Aerial facilities	0
Animals	0
Signs graphics	No
Taxi services	No
TV satellite cable broadcasters	No
Underwater marine services	No
Video conferencing	Yes

Studio Babelsberg

STUDIO BABELSBERG

What they say

"Act global, spend local"

Theme Park:
"For over 100 years the Babelsberg studios have produced films. Now, the filmpark offers a glance behind the scenes of film and television."

General Information

Studio Babelsberg is the oldest large-scale studio complex in the world and one of Europe's leading providers for major motion pictures, independent films and television productions. The Babelsberg team is specialized in international productions and all stages of production. Studio Babelsberg celebrated its 100th anniversary in 2011. On February 12, 1912, in a glass-house quickly erected on the site of an old artificial flower factory in Babelsberg, a set of grand Jupiter-lamps were switched on for the first scene of The Dance of the Dead (Der Totentanz) starring Asta Nielsen.

Studio Babelsberg has always participated in the development of the international cinema and set the benchmark in the fields of sound, animation and cinematographic techniques like establishing the "unchained camera" or the first sound film."

Location

- 39 acre lot
- Houses more than 130 independent companies
- Largest soundstage in the world - Potsdam region
- Berlin city centre, 22 miles
- Permanent studio staff of 90
- Approx. 2000 employed by
surround media centre
- Deals with various hotels and boarding houses in Berlin

Transport

- Berlin Schönefeld airport ,30 miles
- Public transport facilities
- Trains
- Buses
- Trams

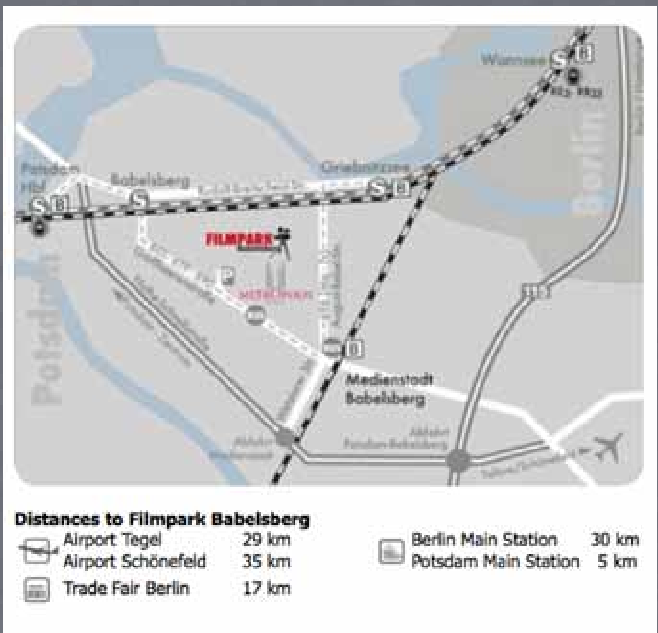
Tax Relief

- Offers tax rebate of up to 20%
- Works with the German Federal

Film Fund (DFFF) who distribute €60 million annually to stimulate filmmaking activities in the area

Facilities

3 special FX houses



Checklist

3D cinema systems	Yes	Personal development	Yes
3D production services	Yes	Personal trainers	Yes
Animation production	Yes	Phones/mobiles/walkie-talkies	Yes
Audience research supply	Yes	Photocopying	Yes
Broadcast satellite services	Yes	Photographers/photographic services	Yes
Broadcast equipment hire sale	Yes	Publications	Yes
Camera equipment hire sale	Yes	Restaurants	Yes
Casting services	Yes	Hair/makeup	Yes
Construction companies	Yes	Lighting equipment hire sale	Yes
Construction supplies	Yes	Location facilities	Yes
Construction scenery	Yes	Location facilities security	Yes
Courier freight services	Yes	Modelmakers creative effects	Yes
Crane plant hire	Yes	Motion capture	Yes
Creative services	Yes	Motion control	Yes
Crewing services	Yes	Multimedia production	Yes
Drapes	Yes	Product placement	Yes
Film commission liaison	Yes	Production companies	Yes
Film stock	Yes	Production design	Yes
Grip equipment hire sale	Yes	Props/firearms/weaponry	Yes
Accommodation hotels	Yes	Props general	Yes
Accommodation services	Yes	Rigging/scaffolding equipment	Yes
Agents	Yes	Sound equipment hire sale	Yes
Associations organisations	Yes	Special *fx*/atmospherics/pyrotechnics	Yes
Car coach hire	Yes	Special *fx*/makeup/prosthetics	Yes
Catering	Yes	Stock shots libraries research	Yes
Chauffeur services	Yes	Soundstages	Yes - 16-20
Childcare	Yes	Largest stage (sq. feet)	78,954
Computer services	Yes	Water filming facilities	Yes
Drivers unit	Yes	Water tanks	Yes
Dry cleaning laundry	Yes	Underwater stage	No
Event management	Yes	Exterior lot location filming	
Financial services	Yes	Location filming	
Fire safety services	Yes	Acres	
Health safety services	Yes	Number of studios	1
Insurance services	Yes	Number of backlots	4.2 acres
Leisure entertainment	Yes	Waste management	Yes
Marketing services	Yes	Film laboratories	Yes
Medical support services	Yes	Postproduction	Yes
Music libraries	Yes	Postproduction audio	Yes
Office supplies	Yes	Production services audio	Yes

Postproduction editing equipment hire	Yes
Production services video	Yes
Software services	Yes
Specialist services	Yes
Foley ADR services	Yes
Preview theatres	Yes
Cutting rooms	Yes
Costume	
Paintshop	Yes
Aerial facilities	
Animals	
Signs graphics	Yes
Taxi services	Yes
TV satellite cable broadcasters	Yes
Underwater marine services	Yes
Video conferencing	Yes

Warner Bros.

What they say

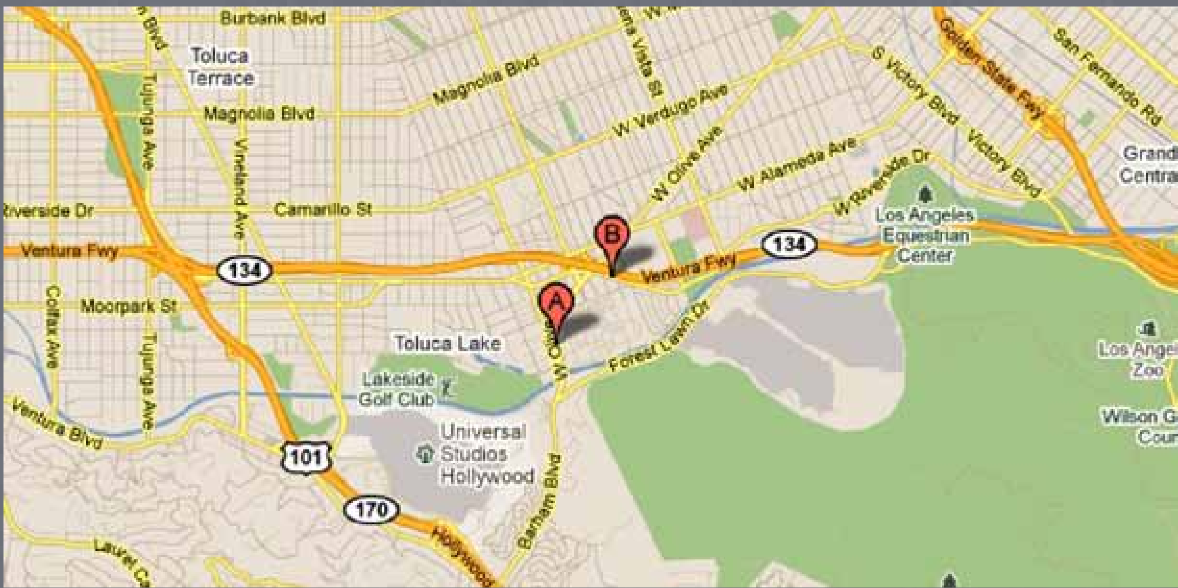
"A Time Warner Company, Warner Bros. Entertainment stands at the forefront of every aspect of the entertainment industry from feature films to television, home entertainment/ DVD, animation, product and brand licensing and interactive entertainment."

General Information

One of the six major American film studios as of 2011
The company is made up of the following divisions :
HOME ENTERTAINMENT, (Home Entertainment Group, Warner Home Video, Warner Bros. Digital Distribution, Warner Bros. Advanced Digital Services, Warner Bros. Interactive Entertainment, Warner Premiere, Warner Bros. Technical Operations, Warner Bros. Anti-Priacy Operations)
MOTION PICTURES, (Warner Bros. Pictures Group, Warner Bros. Pictures, Warner Bros. Pictures International, New Line Cinema)
TELEVISION, (Warner Bros. Television Group, Warner Bros. Television, Telepictures Productions, Warner Horizon Television, Warner Bros. Animation, Warner Bros. Domestic Television Distribution, Warner Bros. International Television Distribution, Studio 2.0, The C Television Network), Consumer Productions, DC Entertainment, Studio Facilities, International Cinemas, Live Theatre.
Warner Bros. has recently built Leavesden Studios London. Facilities include... - Two permanent stages
- Redesign 100 acre backlot
- Harry Potter Experience, visitor attraction; recreation of sets
and costume & props displays - Studio tours beginning 2012
"Warner Bros. wants to make Leavesden a European hub for post-production, including visual effects, animatronics and film editing in the UK, and believes it will attract film business to the country." - Financial Times

Location

- Located in Burbank Los Angeles; 'Media Capital of the world'
-Other Locations: - New York City, New York, Montreal, Quebec, Leavesden Studios, London.
- The Wizarding World of Harry Potter; Universal Studio, Florida
- Opened June 2010
- Rides, shops, interactive sets and dining inspired by the franchise
- Warner Bros. Movie World, Queensland, Australia
- Movie related theme park owned and operated by Village Roadshow



Transport

- Bob Hope International Airport, 5.4 miles
- Transport services; bus, taxi, metro - Surrounding freeways
- Warner Bros. transportation service; over 500 owned and leased vehicles for daily and weekly rental for production community

Tax Relief

- California Film Commission (CFC) allocates $100 million of tax credits each year
- $10 million of which is reserved for independent productions
- To be eligible, a feature film must have a budget between $1 million and $75 million
- To be eligible, an independent film must have a budget between $1 million and $10 million
- Qualified independent films are eligible to receive 25% tax credit
- In 2010, CFC approved $20 million in tax credits for Warner Bros.

Facilities

Re-recording stages | Audio underground | ADR stages | Foley stages | Scoring stage
Sound editorial suites | Transfer services | DVD audio mastering | Projection
Archival and restoration

Checklist

3D cinema systems	No	Personal development	No
3D production services	No	Personal trainers	No
Animation production	No	Phones/mobiles/walkie-talkies	No
Audience research supply	No	Photocopying	Yes
Broadcast satellite services	Yes	Photographers/photographic services	Yes
Broadcast equipment hire sale	Yes	Publications	Yes
Camera equipment hire sale	Yes	Restaurants	Yes
Casting services	No	Hair/makeup	Yes
Construction companies	Yes	Lighting equipment hire sale	Yes
Construction supplies	Yes	Location facilities	Yes
Construction scenery	Yes	Location facilities security	Yes
Courier freight services	Yes	Modelmakers creative effects	Yes
Crane plant hire	No	Motion capture	No
Creative services	No	Motion control	No
Crewing services	Yes	Multimedia production	No
Drapes	Yes	Product placement	Yes
Film commission liaison	No	Production companies	No
Film stock	No	Production design	No
Grip equipment hire sale	Yes	Props/firearms/weaponry	Yes
Accommodation hotels	No	Props general	Yes
Accommodation services	No	Rigging/scaffolding equipment	Yes
Agents	No	Sound equipment hire sale	Yes
Associations organisations	No	Special *fx*/atmospherics/pyrotechnics	Yes
Car coach hire	Yes	Special *fx*/makeup/prosthetics	Yes
Catering	Yes	Stock shots libraries research	Yes
Chauffeur services	Yes	Soundstages	Yes - 31-35
Childcare	No	Largest stage (sq. feet)	32,000
Computer services	Yes	Water filming facilities	Yes
Drivers unit	Yes	Water tanks	4
Dry cleaning laundry	No	Underwater stage	No
Event management	Yes	Exterior lot location filming	Yes
Financial services	No	Location filming	Extensive
Fire safety services	Yes	Acres	42,000
Health safety services	Yes	Number of studios	3
Insurance services	No	Number of backlots	20 acres
Leisure entertainment	No	Waste management	No
Marketing services	No	Film laboratories	No
Medical support services	No	Postproduction	Yes
Music libraries	Yes	Postproduction audio	Yes
Office supplies	Yes	Production services audio	Yes

Postproduction editing equipment hire	Yes
Production services video	Yes
Software services	Yes
Specialist services	Yes
Foley ADR services	Yes
Preview theatres	Yes
Cutting rooms	No
Costume	0
Paintshop	0
Aerial facilities	0
Animals	0
Signs graphics	Yes
Taxi services	Yes
TV satellite cable broadcasters	Yes
Underwater marine services	Yes
Video conferencing	Yes

WETA

What they say

"Weta Workshop is a multi-award winning conceptual design and physical manufacturing facility servicing the world's entertainment and creative industries."

General Information

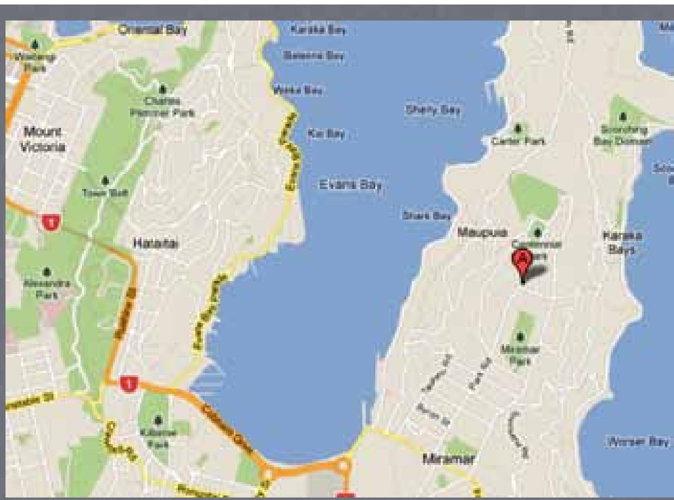
WETA, initially named RT Effects, was created in 1987 by Richard Taylor and Tania Rodgers as a specialist unit offering services including creature work, prosthetics and make-up effects.

In 1994, Peter Jackson and Jamie Selkirk teamed up with Taylor and Rodgers to expand the company to cater for an increasingly international market with a focus on digital effects. Two companies were created to this end: WETA Digital and WETA Workshop.

The WETA group of companies today include virtually all aspects of the filmmaking process including post-production and editorial facilities at Park Road Studios, motion capture facilities and large traditional soundstages at the group's Stone Street Studios.

Location

All WETA group companies are located in and around the Wellington's suburb of Miramar in New Zealand.
Weta Digital, Weta Workshop, Camperdown Studios (Park Road Warehouse, Stone Street Studios) Located in Mirarmar, Wellington
- Up and coming suburb
- South-east of Wellington city centre
- Flourishing creative community
- Parks; Maupuia. Miramar, Centennial



Transport

- Wellington International Airport, 5 miles
- Wellington City Centre, 4.5 miles
- Seafreight operations, Wellington Bay
- Airport shuttle buses to Miramar
- Public transport; metro, buses, trams

Tax Relief

- Film NZ, two incentives

Yes) Large Budget Screen Production
(LBSP) & Post/Digital/Visual
Effects (PDV) incentive offers grant of 15%
No cultural test required
Crews must be working in NZ for at least 13 days to qualify
2) The Screen Production Incentive Fund (SPIF) is designed to assist domestic film and television productions that contain significant New Zealand content.
Productions undertaking post, digital and visual effects: - Grants between NZ$3 million-NZ$15 million
From May 2011:
- Additional grant of NZ$9.75 million available to productions with budgets exceeding $200 million

Facilities

Conceptual design | Creatures | Weapons | Armour & Chainmaille | Specialist Props
Vehicles Speciality Costumes| Models & Miniatures| Special Makeup & Prosthetics
Public Art & Displays

Checklist

3D cinema systems	Yes
3D production services	Yes
Animation production	No
Audience research supply	No
Broadcast satellite services	No
Broadcast equipment hire sale	No
Camera equipment hire sale	No
Casting services	No
Construction companies	No
Construction supplies	Yes
Construction scenery	Yes
Courier freight services	No
Crane plant hire	No
Creative services	Yes
Crewing services	Yes
Drapes	No
Film commission liaison	No
Film stock	Yes
Grip equipment hire sale	Yes
Accommodation hotels	No
Accommodation services	No
Agents	No
Associations organisations	No
Car coach hire	No
Catering	Yes
Chauffeur services	No
Childcare	No
Computer services	Yes
Drivers unit	No
Dry cleaning laundry	No
Event management	No
Financial services	No
Fire safety services	Yes
Health safety services	Yes
Insurance services	No
Leisure entertainment	No
Marketing services	No
Medical support services	No
Music libraries	No
Office supplies	No

Personal development	No
Personal trainers	No
Phones/mobiles/walkie-talkies	No
Photocopying	Yes
Photographers/photographic services	No
Publications	No
Restaurants	No
Hair/makeup	Yes
Lighting equipment hire sale	Yes
Location facilities	No
Location facilities security	No
Modelmakers creative effects	Yes
Motion capture	Yes
Motion control	No
Multimedia production	Yes
Product placement	No
Production companies	No
Production design	Yes
Props/firearms/weaponry	Yes
Props general	Yes
Rigging/scaffolding equipment	No
Sound equipment hire sale	Yes
Special *fx*/atmospherics/pyrotechnics	No
Special *fx*/makeup/prosthetics	Yes
Stock shots libraries research	Yes
Soundstages	Yes - 5
Largest stage (sq. feet)	24,000
Water filming facilities	Yes
Water tanks	No
Underwater stage	No
Exterior lot location filming	New Zealand
Location filming	N/A
Acres	No
Number of studios	No
Number of backlots	60,000
Waste management	No
Film laboratories	Yes
Postproduction	Yes
Postproduction audio	Yes
Production services audio	No

Postproduction editing equipment hire	Yes
Production services video	Yes
Software services	Yes
Specialist services	Yes
Foley ADR services	Yes
Preview theatres	No
Cutting rooms	Yes
Costume	Yes
Paintshop	Yes
Aerial facilities	No
Animals	No
Signs graphics	Yes
Taxi services	No
TV satellite cable broadcasters	No
Underwater marine services	No
Video conferencing	Yes

King's Meadow Campus

The University of Nottingham

History

- Former home of Carlton Central Television/Central Independent Television (Now ITV Central) from 1982 - 2002
- Designed to cater for major film and television production
- ITV's London license holder, Carlton, buys Central Independent Television, become Carlton Central 1994
- 2004, all production ceases at Lenton Lane - Sold to the University of Nottingham in 2005

Transport

- East Midlands Airport, 12 miles
- Accessible by car, train, bus and pedestrians
- Air cargo terminal
- Sea freight access
- Close to M1, A52, A60
- One large car park

Buildings

Main building contains: - 2 studios
- office space,
- manuscript collections, - sports centre,
- cafe,
- restaurant,
- digital facilities

Notable Heritage Sites

- Nottingham City Centre (2 miles)
- Nottingham Castle (1 mile)
- Sherwood Forest (13 miles)
- Wollaton Hall (1 mile)

Film Production

Films shot at KMC

- Control (2007)
- Bunny and the Bull (2009)
- Goal 3 (2009)

Services

- Marketing & Communications
- Alumni
- Recruitment
- Development
- Financial & Business Services


King's Meadow Campus Cafe


Associated Office Space


Car Park


Reception Room

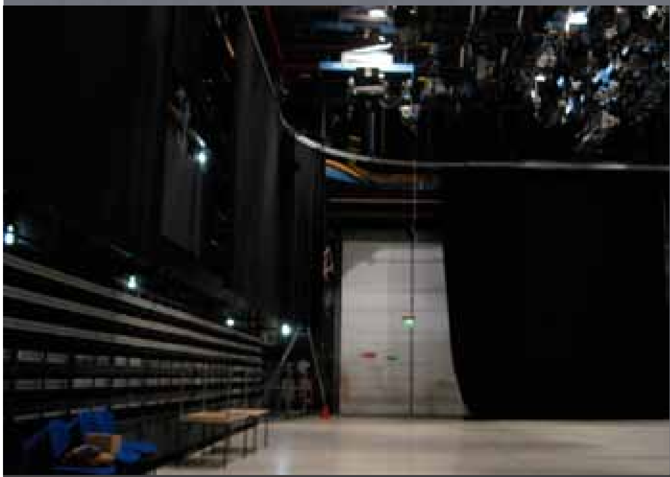
Restaurant

Main Building Entrance

Manuscript Collection

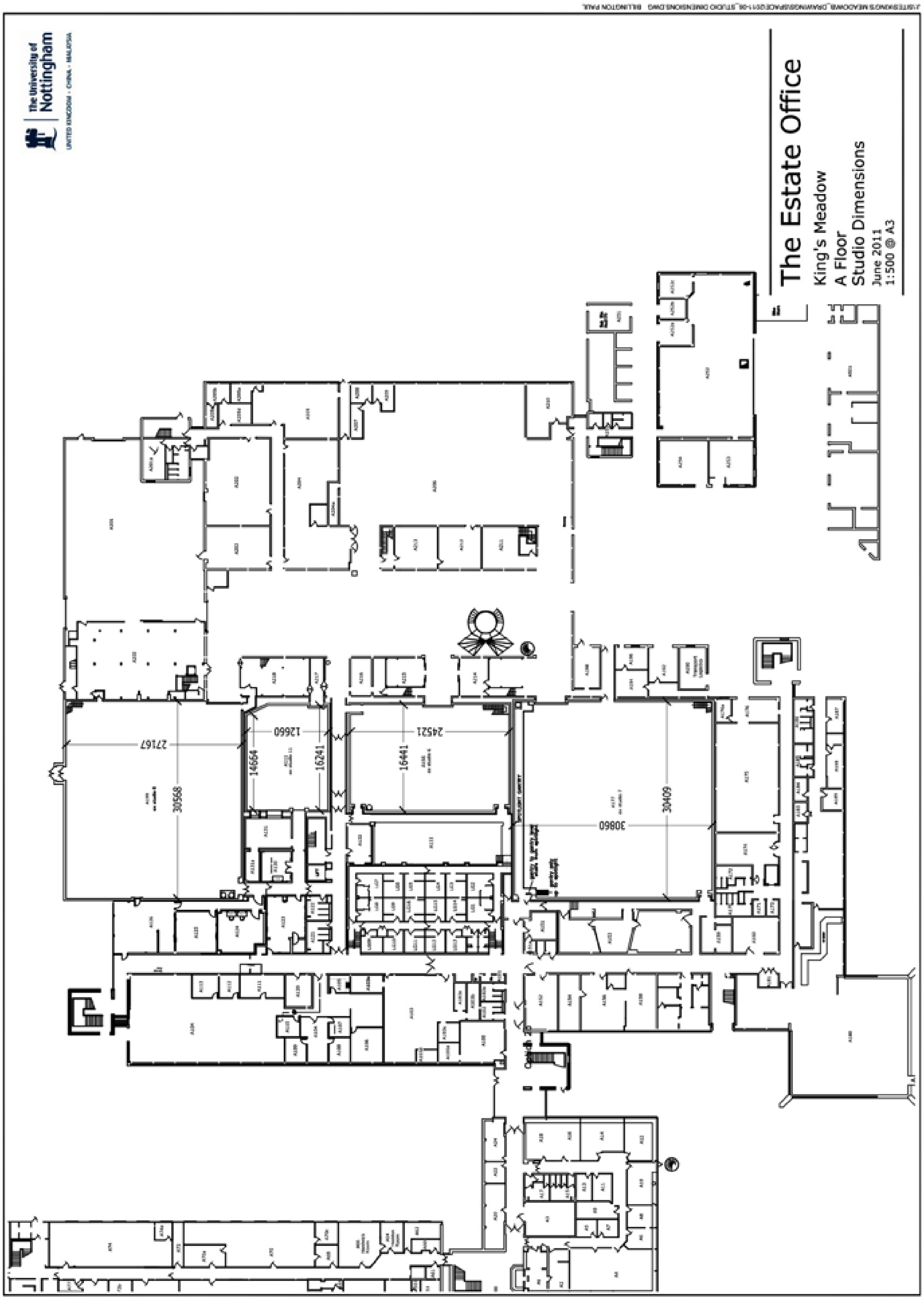
Landscaped Grounds

Storage Space available at King's Meadow Campus



Photographs of Studios 1 and 2 at King's Meadow Campus

Photographs of the studio lights


The University of Nottingham
UNITED KINGDOM · CHINA · MALAYSIA
The Estate Office
King's Meadow
A Floor
Studio Dimensions
June 2011
1:500 @ A3
27167
30568
12660
14664
16241
16441
24521
30860
30409

Welbeck Estate

Open to the Public

- School of Artisan Food
- The Harley Gallery
- Welbeck Farm Shop
- Dukeries Garden Centre
- Craft Workshops

History

- Near 1000 year history
- Residence of the Dukes of Portland
- Occupied by the Ministry of Defence Sixth Form College, 1943-2005
- Family owned estate, William & Alison Parente

Buildings

- Buildings of 18th & 19th Century Origin
- Over 150 disused buildings
- Welbeck House
- Underground Ballroom (173 ft. long)
- Office space
- Underground Library (249 ft. long)
- Private Houses
- Underground Chapel
- Riding School (380ft. long, 112 ft. wide, 50 ft. high)

Transport

- Robin Hood Airport, 23.3 miles
- East Midlands Airport, 43.5 miles
- Retford rail station, 13 miles
- Derby rail station, 37 miles
- Close to A60, A1
- M1, 11 miles
- No pedestrian access

Notable Heritage Sites

- The Peak District, 37.6 miles
- The Lake District, 118 miles
- Wollaton Gardens & Deer Park, 34.3 miles
- Chatsworth House, 28 miles
- Derbyshire Dales, 32 miles
- South Kesteven, 53.5 miles
- East Lindsey, 66 miles

Location

- Worksop, 4.3 miles
- Nottingham, 27.8 miles - Leicester, 52 miles
- Derby, 36.5 miles
- Sheffield, 23.1 miles
- London, 157 miles

Film Production

Filmed on location at Welbeck;
- Bronson, Vertigo Films, 2008
- Macbeth, BBC, 2010
- Interest from Working Title

Services

- Approx. 15,000 acres
- Shrubbery Lake
- Two Entrances; Main Gates Lodge
- Extensive Gardens
- Parkland
- 22 acre Kitchen gardens
- Extensive underground tunnel network
- 24 hour security

Office Space

Library


Welbeck Riding School


Stables

Farm Shop


A network of tunnels links the grounds


Underground Ballroom


Lifts

Photographs of the Welbeck Estate Grounds

Landscaped Gardens

Public Cafe

The Welbeck Estate Buildings

Chapel

Public Space

The Welbeck Estate Buildings

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