

Discussion paper
Single window clearance:
Making India easier for filmmakers
Way forward for Indian Film
Commission



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Executive Summary

Globally, the contribution of audiovisual industry to the general economic development of a region has been well recognized and documented. Investment in the form of foreign production houses shooting in a region provide a multitude of direct, indirect as well as induced benefits in the form of tourism, employment generation, cross-cultural learning and talent development. These direct and accrued benefits have prompted governments across the world to form public bodies called Film Commissions to promote and provide structured facilities to ease foreign productions in a territory.

Given the strength of India's media and entertainment industry, its rich heritage and diverse landscape, India is well poised to attract foreign productions into the country. The intent shown by the Information and Broadcasting Ministry to constitute a Film Facilitation and Promotion Bureau (FFPB) that will include representatives from key ministries such as Home, I&B, Railways, Culture and Tourism, recognizes this potential and is a step in the right direction.¹

This paper attempts to further our understanding of the role played by Film Commissions globally and their benefits by highlighting global best practices.

In our endeavor to understand the nuances of global Film Commissions, we have studied the commissions in Thailand, Britain and Canada. The variety that they

bring owing to the differences in their culture, sizes and geographical locations helped us get a holistic view. These countries also emerged as favorite destinations for shooting within the Indian film fraternity as per a survey commissioned by FICCI². These commissions have gone beyond just providing assistance with entry and various requisite permissions. They provide a variety of services throughout the life cycle of a production, starting from location scouting and permissions during pre-production phase to providing co-ordinates of various local productions houses, guilds, equipment providers and post-production houses in subsequent stages. Further, they may also provide financial incentives to attract production houses to their specific region.

Based on our conversation with the various stakeholders within the Indian film fraternity as well as the progression of Film Commissions in select counties, we envisage that a two tiered structure comprising national and regional Film Commissions could augur well for India, given its scale and complexity. While immediate steps would be to lay out clear rules and regulations and provide an exhaustive information repository, medium term steps would be to provide a single window clearance and a comprehensive database of locations and production facilities. In the long term, the commission could consider offering tax credits and other financial incentives at par with the services of mature Film Commissions around the globe.



Film Commission: A step in the right direction

Introduction

In today's world, cultural activities have become a key enabler of territorial and economic development. The audiovisual sector has demonstrated its role in the overall development to such an extent, that public institutions have started investing resources to promote the audiovisual field. One such foray is setting up Film Commissions. Globally, many countries have instituted Film Commissions at national, provincial and in some cases, even at the city level.

Film Commissions are generally set up as quasi-government / non-profit organizations. They are expected to attract audiovisual productions such as films, TV series, documentaries, music videos and advertisements to a given region by offering them ease of access and various incentives.

Benefits of audiovisual production in a region

Film making can be broadly segmented into three stages – Pre-production, Production and Post-Production. A Film Commission encourages foreign investors by streamlining activities and providing assistance at every stage along this value chain. The multitude of benefits at each stage is only aggrandized by the fillip it gives to the local audiovisual sector. Broadly the benefits can be divided across three categories:



Some specific instances where the filming of popular cinema has positively impacted tourism are as follows: ³

Table 1: Impact on tourism of specific locations post shooting of productions at that location

Movie	Impact on tourism	Region / Place
Lord of the rings	40% increase in visitors since 1990s	New Zealand
Mission Impossible 2	200% increase in 2000	National parks in Sydney
Twilight Saga	Tenfold increase in visitors	Forks, Washington, USA
Braveheart	300% increase in visitors	Wallace monument, Scotland
The Beach	22% increase in visitors in 2000	Thailand
Saving Private Ryan	40% increase in American tourists	Normandy, France
Zindagi Na Milegi Dobra	35% in first half of 2011	Spain

In India, there have been many well-known localized instances of film based tourism. Shonar Kella, the celluloid masterpiece by Satyajit Ray, epitomized Jaisalmer’s golden fort⁴. Hajan valley in Pahalgam was renamed Betaab valley after the Bollywood movie of the same name was released since majority of the movie was shot there⁵. More recently, the highest grossing Hindi movie of all time⁶, 3 Idiots, has led to a multifold increase in tourists visiting Pangong Tso lake, Ladhak after the climax scene of the movie was shot there⁷.

Role of a Film Commission

A Film Commission plays the role of a gatekeeper and a facilitator which eases the entire process of film production in a particular territory. It handholds the foreign production house through the entire process from location scouting and facilitating permissions to offering operational assistance during the shoot itself.

The paper attempts to explore some global best practices among Film Commissions and lays down high level recommendations for the proposed Film Commission in India.



Global case studies

Thailand Film Office⁸

Thailand provides a wide range of locations ranging from its world renowned beaches and exotic jungles to ancient temple ruins. From being a preferred location for the James Bond flick 'The Man with the Golden Gun', Thailand has featured in many recent movies such as 'The Beach', 'City of Ghosts', 'Rescue Dawn' and 'Hangover II'. Thailand has also been a popular destination for Bollywood productions. In 2012, a total of 526 foreign audiovisual productions were shot in Thailand, together accounting for revenues of USD 47 mn. Thailand Film Office is the national Film Commission which acts as the facilitator for foreign productions to be shot in Thailand, apart from providing a host of other services.

Objective

Thailand film office is an organization set up to help foreign producers with all required information, permissions and incentives to film in Thailand.

Roles and Responsibilities

Thailand film office provides a wide array of services spread across the entire production life cycle and beyond. These are summarized as follows:

Operational assistance to foreign productions



Entry and informational assistance to foreign productions

- Necessary information with respect to acquiring work permits and Visas
- Information relevant for import of equipment production
- Information about the country, its climate, do's and don'ts and other handy tips
- Contact details of various govt. agencies and transport agencies

Financial assistance to foreign productions

Tax

- It provides contact details of the revenue department of Thailand for information on Double taxation treaty

Incentives

- Thailand film office doesn't have a formal incentive program as yet
-

Marketing of the region

- The film office participates in various film festivals such as Cannes and promotes the territory through ad campaigns (E.g. 'Unleash your imagination' campaign at Cannes, 2011)

- The film office has also recently organized an inbound roadshow aimed at familiarizing and showcasing the country to key participants

Set up Structure

Thailand film office is set up under the Department of Tourism which comes under the Ministry of Tourism and Sports.

Within the film office, they have four separate verticals – Film business promotion section, Shooting permit consideration section, Co-operations and special affairs sections, and General affairs section. As per their website they have a total of 17 staff members dedicated to the film office.

Affiliations

Thailand Film Office is a member of following international network of commissions.

- Association of Film Commissioners International is a non-profit educational association whose members are Film Commissions across the world. These commissions could be at a city, state, regional or country level. The AFCl serves as a central database for over 200 local commissions and provides location assistance and contact details for the relevant region.⁹
- Asian Film Commissions Network is a non-profit organization with over 50 Film Commissions from 19 countries. The organization was established to facilitate information sharing with regards to filming locations, regulations, incentives and clearance requirements of member countries in Asia and to promote the steady growth of regional filming through improved systems and infrastructure.¹⁰



British Film Commission ¹¹

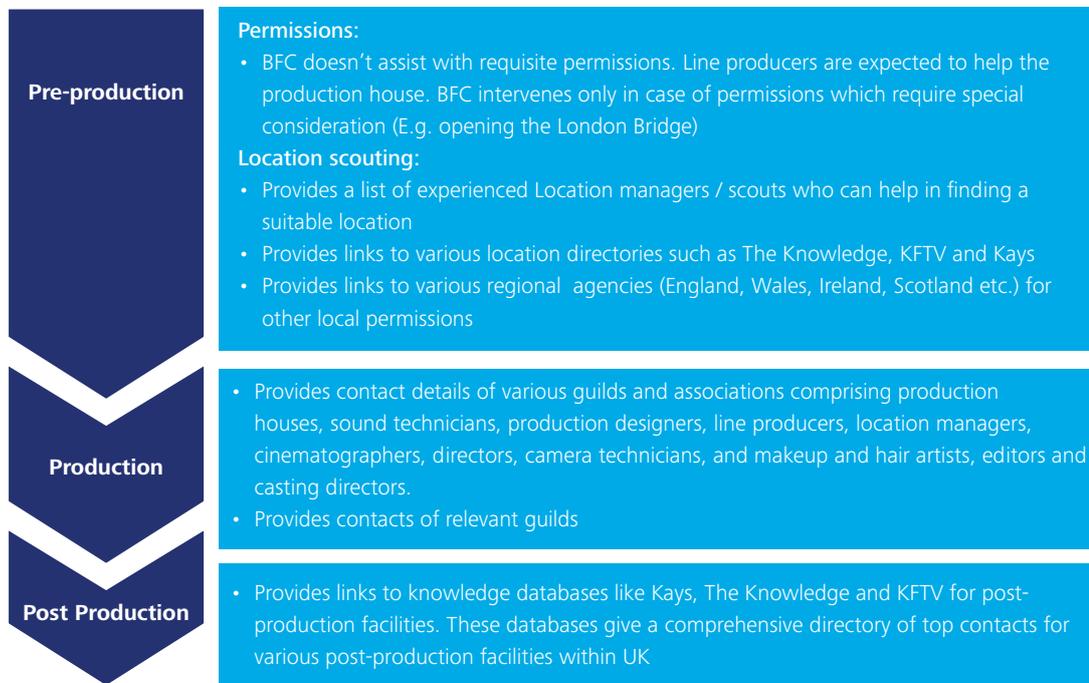
The United Kingdom has been a preferred destination for many productions in Hollywood due to excellent infrastructure and availability of talented and experienced crew. Some of the famous movies shot in UK include 'The Da Vinci Code', 'Golden Compass', 'The Bourne Ultimatum', 'The Dark Knight', 'Clash of the Titans' and 'Inception'. The UK region saw 32 foreign films being shot in 2011, together accounting for a total inward investment of £1,012 mn¹². Specifically in Britain, the British Film Commission is the government body responsible for attracting foreign film productions to Britain.

Objective

The British Film Commission (BFC) is the national body in charge of attracting, encouraging and supporting the production of international feature films in UK.

Roles and Responsibilities

Operational assistance to foreign productions



Entry and informational assistance to foreign productions

- Necessary information with respect to migration of workers and import of equipment
- All information required for mandatory film insurance along with a database of insurance companies
- Contact details of various government agencies, information sources and directories, travel and tourism associations, weather associations etc.

Financial assistance to foreign productions

Tax

- Tax reliefs to films passing the cultural test or qualifying as a co-production. Details are available through the His Majesty Revenue and Customs department (HMRC)

Marketing of the region

- The film office participates in various film festivals such as Toronto International Film Festival to promote UK as a favored territory
- It also organizes various networking events with other screen agencies in the UK
- It has a branch in Los Angeles to further the attraction of the territory within Hollywood

Set up Structure

The British Film Commission is a division of Film London which is funded by the Department for Culture, Media and Sport through the British Film Institute. The Commission is supported by:

- The Mayor of London
- The National Lottery (Film Forever)
- Public funding by Arts Council England

The commission has a chairman and a chief executive who is also the chief executive of Film London. In addition, the commission has three support staff in London and a two member team in Los Angeles.

Affiliations

The British Film Commission is a member of the AFCL. It is a division of Film London which in turn is affiliated to European Film Commissions Network.¹³

Association of Film Commissioners International is a non-profit educational association whose members are Film Commissions across the world. These commissions could be at a city, state, regional or country level. The AFCL serves as a central database for over 200 local commissions and provides location assistance and contact details for the relevant region.¹⁴

European Film Commissions Network is a non-profit association which supports and promotes the European film industry and culture. Its main aim is to promote the exchange of information between its member commissions, to sustain the development of location scouting and shooting opportunities and to carry out professional and educational activities for its members.



Film Commissions of Canada (Ontario, British Columbia & Alberta)¹⁵

While Canada doesn't have a central Film Commission representing the country, different regions have their respective commissions. We considered the Ontario Media Development Corporation (OMDC), British Columbia Film Commission (BCFC) and Alberta Film among several others. These commissions together account for over 90% of foreign location and service production shot in Canada. Canada saw 232 foreign films being shot in 2012, together accounting for a total inward investment of USD 1,675 mn.

Objective

The broad objective of each of these commissions is to ensure that the business of film and television production thrives as a value proposition for domestic and international clientele. While not all these commissions serve as a one-stop shop, they each have close ties with municipal authorities and strive to provide maximum comfort for foreign production houses.

Roles and Responsibilities

Operational assistance to foreign productions

	British Columbia Film Commission (BCFC)	Ontario Media Development Corporation (OMDC)	Alberta Film
Pre-production	Permissions		
	Links to respective authority for permits	Links to respective authority and provides timelines for getting the permits	Links for parks and city authorities
	Location Scouting		
	Database of various locations, a directory of films shot there and useful contacts and links for necessary permissions	Database of various locations, a directory of films shot there and useful contacts and links for necessary permissions	All required location information, permissions, pictures, and local contact information
Production	Redirects producers to the appropriate agencies regarding information of trade unions, guilds, labor rates, studio facilities and suppliers	Redirects producers to the appropriate agencies regarding information of trade unions, guilds, labor rates, studio facilities and suppliers	Provides an exhaustive database of local contacts and also provides a list of films under production in Alberta with their respective contact details
	Provides a list of studios for post-production and VFX with their contact information	Has comprehensive details about various post-production facilities and their services	No assistance provided
Post Production			

Entry and informational assistance to foreign productions

- All the commissions provide information specific to the region including past productions, weather guidance, community background and film liaison offices
- Alberta Film also specifies visa requirements while BCFC and OMDC provide links for tax credits which also have information regarding visa regulations and immigration rules

Financial assistance to foreign productions

Tax

- OMDC, Alberta Film and BCFC offer tax credits in varying amounts. The tax credit depends on the total expenditure in Canada and includes expenditure in marketing and post-production related services



Marketing for all regions

- All three commissions have representation in Los Angeles and close ties with major production studios
- In addition, the commissions highlight top grossing productions filmed in the respective regions and provide snippets from the cast and crew about their experience while filming
- OMDC provides funds for media development and also publishes statistics on the media and entertainment business in the region on a regular basis

Set up Structure

All the three commissions are branches of the local provincial governments.

- OMDC is a division of the Ministry of Tourism, Culture and Sport. Its team comprises 12 people, including a CEO, an industry leader, a director for tax credits, a strategic planning manager and a communications secretary
- The BCFC falls under the Ministry of Community, Sport and Cultural Development. It oversees eight regional commissions such as Cariboo Chilcotin Coast Tourism, Columbia Shuswap Film Commission, the Greater Victoria Film Commission and Vancouver Island North Film Commission among others

- Alberta Film, a branch of the Government of Alberta, supports the growth, sustainability, competitiveness and business attraction of Alberta's screen-based production industries. Alberta Film's team comprises 4 people, including the commissioner, a manager for marketing and communications, a specialist for locations and logistics and a film and television information officer

Affiliations

All three Film Commissions and numerous others within Canada are members of AFCl.

Association of Film Commissioners International is a non-profit educational association whose members are Film Commissions across the world. These commissions could be at a city, state, regional or country level. The AFCl serves as a central database for over 200 local commissions and provides location assistance and contact details for the relevant region.



Scenario in India

India has one of the largest film industries in the world, produces the largest number of films annually, constitutes the highest number of tickets sold annually and has the second highest screen count in the world¹⁷. The country possesses rich culture and heritage and a variety of landscapes. This coupled with able local talent makes it an apt destination for foreign productions.

The sheer potential of the region along with growing interest in Hollywood movies has resulted in an increase in number of requests from foreign film productions to shoot in India - from 10 in 2009-10 to 28 in 2010-11¹⁸. However, there are a multitude of challenges which plague the process of shooting in India.¹⁹

The situation is a far cry from mature Film Commissions worldwide which provide tax incentives, single window clearance systems and assistance throughout the film production life cycle leveraging local resources and talent.

The intent shown by the Information and Broadcasting Ministry to constitute a national Film Commission recognizes the potential of the country and current challenges faced by this sector.

Based on discussions with the various stakeholders in the country as well as the progression of Film Commissions in select counties, we envisage that a 2-tiered system of Film Commissions might be prudent for better operational flexibility and ease of implementation. There could be a phase wise roll out of various services to eventually attain the state of a mature Film Commission; one that provides the entire gamut of services.

Multiple layers of bureaucracy	There is no single window to provide all clearances needed to shoot in India. Producers need to approach several institutions to understand the required permissions. At times filmmakers need to obtain over 70 permissions and licenses for a shoot in the country ²⁰ without any pre-defined turnaround time.
Lack of transparency and credibility	With respect to obtaining permissions, foreign producers often find themselves without clearly laid out rules and regulations which makes the entire process time consuming and at times highly expensive. This leads to dissatisfaction and hence hampers trust.
No central repository for locations	Producers have to rely on online sources, travel agents and line producers. Since Internet research and travel guides offer limited information on filming logistics, foreign producers mostly rely on local line producers. However, currently there is no certified database of line producers to establish their credibility.
Lack of central repository for talent	The absence of a credible central database to provide a list of available resources in the country/region leads to foreign productions importing equipment and personnel from foreign/home locations. This adds to the producer's cost and limits benefits to the local industry.

Possible way forward for the Film Commission in India

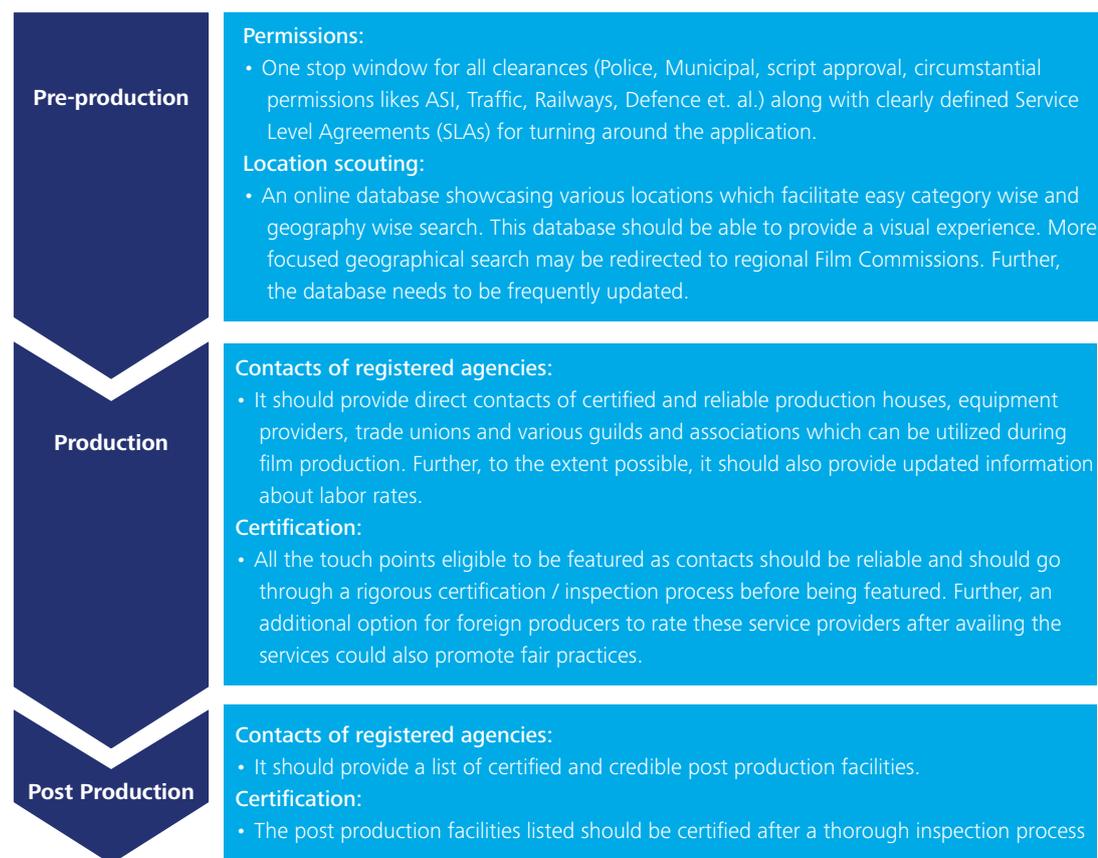
Proposed Objective

The objective of the Indian Film Commission should be to promote India as a territory favored by foreign film producers for shooting and to provide free assistance throughout the film production life cycle.

Proposed Roles and Responsibilities

While there are numerous services which a Film Commission can provide and the ultimate endeavor would be to provide all of them, the Indian Film Commission could roll out the services a phased manner. A summary of all services that could be provided is as follows.

Operational assistance to foreign productions



Entry and informational assistance to foreign productions

- It should provide necessary information with respect to acquiring work permits, Visas and rules for import and subsequent export of equipment
- Additionally, it should provide information about the country, its climate, do's and don'ts and other handy tips
- It may also choose to provide contact details of relevant govt. agencies and transport agencies

Financial assistance to foreign productions

Financial Incentives

- It may choose to provide tax credits and rebates based on certain minimum expenditure incurred in India by the foreign productions. However, a broad based tax credit scheme may need to be worked out, also considering the local producers

Funding

- Film funding does not fall under the purview of a Film Commission and may be carried out by independent film funds or financial institutions. But the Film Commission may need to work closely with film funds to provide funding options to producers

Marketing for the regions

- The Film Commission could participate in various film festivals such as Cannes, Toronto and promote India as a favored territory through ad campaigns (could be on the lines of 'Incredible India' campaign)
- The Film Commission could organize roadshows showcasing the country to key foreign producers or members of the film fraternity
- The Film Commission may also want to open offices overseas, particularly in Hollywood to help in influencing the decisions of foreign film producers to shoot in India.

A phased out approach could be considered for roll out of the aforementioned services.

	Services to be rolled out in near term (1-2 years)	Services to be rolled out in medium term (2-4 years)	Services to be rolled out in long term (>4 years)
Area	Activities to be rolled out		
Operational assistance	<ul style="list-style-type: none"> • Redirection of permissions to apt bodies • Basic location scouting services 	<ul style="list-style-type: none"> • Single window permission clearance • Comprehensive location scouting services 	
	<ul style="list-style-type: none"> • Basic database of registered agencies for production • Basic database of registered agencies for post-production 	<ul style="list-style-type: none"> • Comprehensive database of registered agencies for production • Comprehensive database of registered agencies for post-production 	<ul style="list-style-type: none"> • Certification and rating of registered agencies • Certification and rating of registered agencies
Informational assistance	<ul style="list-style-type: none"> • Information on work permits, visa, import-export of equipment 	<ul style="list-style-type: none"> • Information about general code of conduct in the country, contact of other relevant govt. agencies 	
Financial assistance			<ul style="list-style-type: none"> • Tax credits • Assistance in funding
Marketing initiatives	<ul style="list-style-type: none"> • Participation in film festivals and events 	<ul style="list-style-type: none"> • Organize roadshows in the country • Open offices overseas 	

Proposed Set up Structure

The Indian Film Commission would be formed under the aegis of Ministry of Information and Broadcasting. Given the enormity of the country and the variety of locations possible, it may be prudent to consider a two tiered structure – An Indian Film Commission at the national level with multiple Film Commissions at regional or state level.

<p>National level Film Commission</p>	<p>A country level commission would be the first point of contact for any foreign film producer. It would also act as the foremost marketing body for Indian territory, actively taking part in various international film related events. It may also provide a central repository of all permissions required and the subsequent required processes</p>
<p>Regional / State level Film Commission</p>	<p>Regional / State level bodies being much more focused and smaller in size would provide the operational efficiency and flexibility when it comes to assistance throughout the production life cycle. They may also provide the state level incentives and may compete with other state level commissions for promoting their respective territories.</p>

A two tiered structure would facilitate the fulfillment of a national ambassadorial role by the main national Film Commission which would also act as a gatekeeper for all foreign film productions. At the same time, the smaller regional/state level Film Commissions would provide flexibility, operational efficiency and greater depth of information when it comes to local territories. However, it is imperative that the bodies at the national and regional level work in tandem to provide a seamless experience to foreign film producers.

Affiliations

As per convention, it would be crucial to attain membership of international networks of Film Commissions. These memberships would help in expanding the reach of the commission as well as enable an exchange of the best practices among commissions.

The pertinent networks for an Indian Film Commission would be as follows.

- Association of Film Commissioners International is a non-profit educational association whose members are Film Commissions across the world. These commissions could be at a city, state, regional or country level. The AFCl serves as a central database for over 200 local commissions and provides location assistance and contact details for the relevant region.²¹
- Asian Film Commissions Network is a non-profit organization with over 50 Film Commissions from 19 countries. The organization was established to facilitate information sharing in regards to filming locations, regulations, incentives and clearance requirements of member countries in Asia and promote the steady growth of regional filming through improved systems and infrastructure.²¹

Some of the most evident benefits of being affiliated with these networks are:

Showcasing country / region at various events	The AFCI and the AFCNet organize and attend various events around the world. These events include: the Berlin International Film Festival, Cannes, Sundance, Cineposium, and Locations 2013 and are attended by the Association of Independent Commercial Producers (AICP), Alliance of Women Directors, American Cinema Editors, Art Directors Guild (ADG), American Society of Cinematographers (ASC) and many more. These associations are key decision makers while scouting for locations and hiring local talent.
Internalization of global best practices	To be a part of the AFCI, Film Commissioners need to complete a certification process. This process helps help achieve standardization across the globe thereby educating Film Commissioners about the frequent needs of film units. The AFCI also provides courses for Film Commissioners on ways to monitor the economic impact of filming in the region, how to be an effective leader and negotiator as well as advanced courses in film making to understand the process and be prepared to encounter every question a foreign producer might have.
Information flow and partnerships	When Film Commissioners are in the loop of the latest productions, technological developments and global rates for services and equipment, they are in a better position to pitch their country/region as well as look for partnerships with other commissions for mutual benefit.
Wider reach	These international networks of commissions have a much wider reach. When a commission is part of a larger network like the AFCI and/or AFCNet, producers get to know of the commission and the steps being taken by them to encourage filming.



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During the course of writing the paper, we spoke to various people related to the industry. DTTIPL and FICCI would like to acknowledge them for their insights which form an integral part of the analysis presented in the paper. We are extremely grateful for their contribution and would like to thank them.

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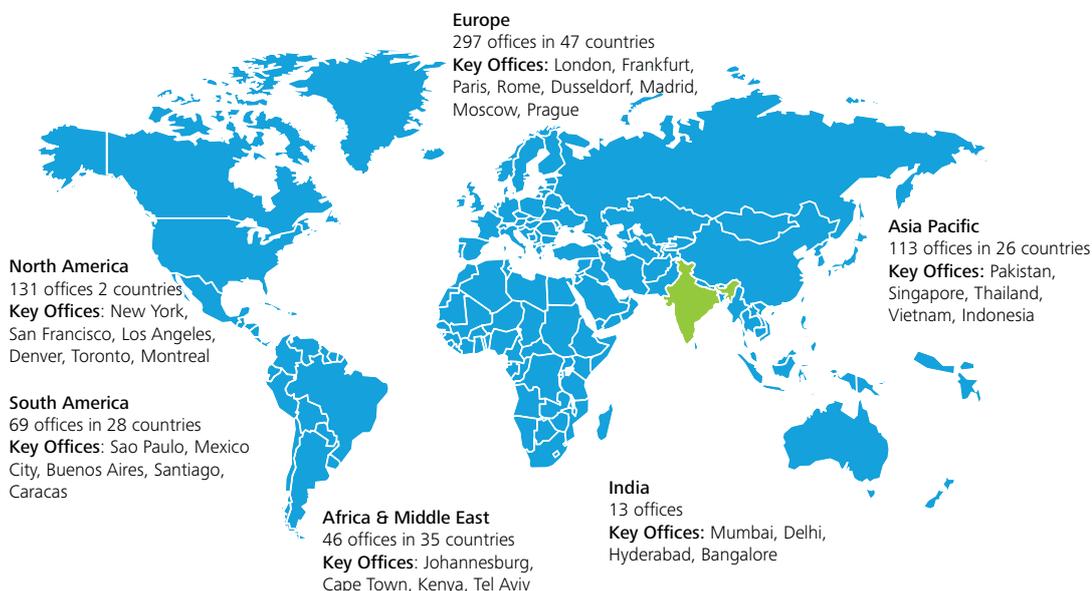
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Selected Technology, Media & Telecommunications thought leadership in India

Technology, Media & Telecommunications Predictions, 2013

This publication is released in conjunction with Deloitte's global Predictions report for the TMT sector and presents our view of key developments over the next 12-18 months that are likely to have significant medium-to long-term impacts for companies in TMT and other industries in India.



Media & Entertainment in East India - Bengal

A White Paper, written by DTTIPL that was released at FICCI's Business Conclave East (Kolkata) December, 2012. It studies the current state and market potential of the different segments of Media & Entertainment in East India.



Media & Entertainment in South India

A White Paper, written by DTTIPL that was released at FICCI's Business Conclave, Chennai October, 2012. It studies the current state and market potential of the different segments of Media & Entertainment in South India.



The state of media democracy

This is the second edition of The State of the Media Democracy Survey – India (the Survey). The survey was carried out late 2011/early 2012 and provides a generational 'reality check' on consumer preferences, interaction with technology, purchasing trends, response to advertising and a peek into future preferences.



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