

Cinema Cities, Media Cities: The Contemporary International Studio Complex

by Ben Goldsmith and Tom O'Regan
Faculty of Arts, Griffith University, Brisbane

Screen Industry, Culture and Policy Research Series

Australian Film Commission, Sydney
Australian Key Centre for Cultural and Media Policy, Brisbane, and
Creative Industries Research and Applications Centre, Brisbane
September 2003

A project commissioned by the Australian Key Centre for Cultural and Media Policy and the Australian Film Commission.

© 2003 Australian Film Commission, Ben Goldsmith, Tom O'Regan, Creative Industries Research and Applications Centre.

All rights reserved. Without limiting the rights under copyright reserved above, no part of this publication may be reproduced, stored in or introduced into a retrieval system, or transmitted, in any form or by any means (electronic, mechanical, photocopying, recording or otherwise), without the prior written permission of the Australian Film Commission.

The information provided in this book has been drawn from a variety of sources. The authors have undertaken all reasonable measures to ensure its accuracy and therefore neither they nor the publishers can accept any responsibility for inaccuracies or omissions, and specifically disclaim any liability for any loss or risk, personal or otherwise, which is incurred as a consequence, directly or indirectly, of the use and application of any of the contents of this book.

ISBN 0-9580152-7-9

Australian Film Commission
Level 4, 150 William Street
Woolloomooloo NSW
Tel: (02) 9231 6444
Fax: (02) 9357 3737
Email: publishing@afc.gov.au
Web: <http://www.afc.gov.au>

Faculty of Arts
Griffith University
Brisbane Qld 4111
Tel: (07) 3875 7111
Fax: (07) 3875 5511
Email: b.goldsmith@griffith.edu.au, t.oregan@griffith.edu.au

Creative Industries Research and Applications Centre (CIRAC)
Creative Industries Faculty
Queensland University of Technology
GPO Box 2434
Brisbane Qld 4000
Tel: (07) 3864 4111
Fax: (07) 3864 1031
Email: qut.cirac@qut.com
Web: www.creativeindustries.qut.com/research/cirac

Copy editing: Catherine Gray
Design and production: Australia Region Media

Printed by Southwood Press

Acknowledgments

Sincere thanks to all the interviewees who so generously gave their time and experience: (in alphabetical order) Lynne Benzie, Louisa Coppel, John Cox, Elle Croxford, Dale Duguid, Lynn Gailey, Barbara Gibbs, Carol Hughes, Terry Jackman, Robin James, Vic Kasper, Gary Keir, John Lee, Garry McDonald, Murray Pope, Veronica Sive, Henry Tefay, Marc van Buuren, and Kim Williams.

The views expressed and any errors committed in this report are the authors' alone and do not represent the views of the individuals interviewed or their institutions, nor do they represent the views of the Australian Film Commission.

All direct quotes in the report are from interviews conducted by the authors between July 2001 and February 2003.

Thanks also to our research assistants on this project: Dr Susan Ward, who assisted us with most of the interviews, lending her considerable knowledge of the Queensland film milieu; Tiziana Ferrero-Regis for her help in negotiating the byways of Cinecittà; and Mark Ryan for last minute checking.

We would like to acknowledge the support and encouragement of Professor Stuart Cunningham in initiating the research project and sticking with it; and the Australian Film Commission for their patience as this project took much longer than anticipated.

The research for this project was initially funded through an Australian Research Council SPIRT grant and finalised through funding from the Australian Research Council's Postdoctoral Fellowship (Goldsmith) and Discovery Research grant schemes (O'Regan). A Griffith University Research Grant on international production in Queensland also funded part of the research for this report.

About the authors

Dr Ben Goldsmith is an Australian Postdoctoral Research Fellow in the Faculty of Arts, Griffith University. His Fellowship examines the contemporary international audiovisual production environment, with particular focus on studio complexes, footloose production and co-productions, and the impacts of free trade agreements on film and television production. He was a Research Fellow at the Australian Key Centre for Cultural and Media Policy from 1998 to 2002, where he worked on a variety of projects covering Indigenous culture and intellectual property, film policy, cultural diversity and cultural policy, and broadcasting regulation and policy. He is a co-author of the recent report *The Future for Local Content* (Australian Broadcasting Authority, 2001).

Professor Tom O'Regan was Director of the Australian Key Centre for Cultural and Media Policy (CMP) from 1999 to 2002 inclusive. He was integrally involved in developing the role of policy analysis and study in communication, media and cultural studies in Australia and internationally. He co-founded the cultural and media studies journal *Continuum* (1987–1995). His books include *Australian Television Culture* (Allen & Unwin, 1993) and *Australian National Cinema* (Routledge, 1996). He is a co-author of the recent report *The Future for Local Content* (Australian Broadcasting Authority, 2001) and co-editor of a book on audience development strategies in the arts and media sectors, *Mobilising the Audience* (UQP, 2002). In 2002 he was elected a Fellow of Australian Academy of the Humanities.

Contents

INTRODUCTION	7
The spread of the studio complex.....	7
The nature of the studio complex	8
The paradoxes of the studio complex.....	9
The dynamics of international production.....	11
The components of this study.....	13
CHAPTER 1. THE POLICY ENVIRONMENT OF THE CONTEMPORARY FILM STUDIO	15
Old and new perspectives.....	16
Government support for studios	16
Infrastructure provision.....	17
Private and public partnerships	18
Value-adding clusters and precincts.....	18
Rethinking the relationship between local and international production	19
Resurgence of the 'studio idea'	21
CHAPTER 2. MAPPING DIVERSITY AND SCOPE	23
Size and location	23
Patterns of ownership and management.....	25
Quality of infrastructure and institutional connections	27
The balance of work	29
When they were built.....	30
Functional profile and spatial concentration.....	31
The production precinct.....	32
The cinema city	32
The media city.....	32
Conclusion	33
CHAPTER 3. CASE STUDIES IN DEVELOPMENT AND RENOVATION	35
From production precinct to cinema city: The greenfields studios of Vancouver and the Gold Coast	36
Between cinema city and media city: The inner-urban studio complexes of Sydney, Toronto and Melbourne	40
The international production city: Barrandov and Prague Studios	45
Media city by circumstance: Cinecittà	49
Media city by design: Studio Babelsberg.....	54
The mega-media city: Pinewood and Shepperton	57
The new media studio complex: Ealing Studios and the proposed Leavesden redevelopment	59
Conclusion: Australian studio complexes in relation to international developments	61

CHAPTER 4. CAPTURING THE STUDIO COMPLEX AND ITS LIAISON NETWORKS	63
From studio resource to 'command and control' centre: The changing role of the Hollywood 'majors'	63
'Plug in' film services: Aggregation amidst vertical disintegration.....	67
Studio complexes as rental spaces	69
Real and illusionist space: The studio complex as infrastructure and service centre.....	71
Production liaison functions: Organising the competition outside not inside	74
Conclusion	77
CHAPTER 5. PARALLEL AND CONVERGING INDUSTRIES: STUDIOS AND THE LOCAL AND THE INTERNATIONAL FILM INDUSTRIES	79
The studio complex as an active link for convergence of international and local production	82
Towards a film services framework	84
APPENDIX. INFORMATION ON KEY INTERNATIONAL STUDIO COMPLEXES	89

Introduction

THE SPREAD OF THE STUDIO COMPLEX

Advances in information and communication technologies have enabled elements of film and television production to be perhaps more widely dispersed than at any previous time in the history of the media. A single project's financing, pre-production, production, post-production and marketing each can and do take place in different parts of the world. And while historically it is not unusual for elements of a single project's production and post-production to be undertaken in different locations, in recent years the amount of internationally mobile production and post-production has grown to unprecedented levels. Statistical data on the volume and total production spend of runaway production indicate that such production has become an integral part of many film economies. Looking at the pre-production, production and post-production parts of that chain, the tendency until recently has perhaps been most remarkable in animation,¹ but location production and dispersed post-production have both become increasingly common.²

But at the same time as this growing dispersal which appears to free audiovisual production as never before, there is a movement towards concentration of production and post-production in a number of particular locations. Some of these have been historically significant filmmaking centres. Others have developed capacity in more recent times. A key common feature of these centres is the existence of a studio complex and/or a cluster of related production and service companies. For a time it seemed as though large cities and aspirant players could meet the spatial needs of producers with sound stages fashioned from converted warehouses, factories or bus depots (such as the provincial government-owned The Bridge Studios in Vancouver, Canada). Many if not all production services could be obtained in the city or region around the sound stage. But in recent times it seems that in order to maintain or grow their share of the increasing volume of mobile, international production, these centres have needed to develop integrated production spaces allowing for the co-location of a variety of services.

There has been something of a recent vogue internationally for large-scale studio complexes comprising sound stages, construction workshops, production offices, perhaps a watertank and backlot, and a number of tenant or related service companies enabling considerable amounts of work on a project to be conducted on a single site. Studio complexes with multiple sound stages capable of meeting the production needs of high-budget and blockbuster production while simultaneously servicing telemovie, television series or advertising production are springing up or being talked up around the globe. Existing facilities are undergoing extensive and often extremely costly refurbishments to remain technologically competent and internationally competitive.

In many cases such developments have obtained substantial public support in the form of loans and tax concessions, as well as indirect benefits from the promotional work of film agencies. Some are even part publicly owned or managed as state-owned enterprises. Increasingly, it seems, they require ongoing support, needing periodic injections of public funds or largesse to remain competitive and on the technological cutting edge. Along with tax and investment incentive schemes, favourable foreign currency exchange rates and a pool of highly skilled personnel, studio complexes are core components of the

¹ See David Hubka (2002), 'Globalization of Cultural Production: The Transformation of Children's Animated Television 1980 to 1995' in Diana Crane, Nobuko Kawashima and Ken'ichi Kawasaki (eds), *Global Culture: Media, Arts, Policy, and Globalization*, New York: Routledge, pp. 233–255; John A. Lent (1998), 'The Animation Industry and Its Offshore Factories', in Gerald Sussman and John A. Lent (eds), *Global Productions: Labor in the Making of the 'Information Society'*, Cresskill, NJ: Hampton Press, pp. 239–254.

² For example, Sohonet, a London-based network of 12 post-production companies working cooperatively to win a greater share of Hollywood work, has recently established facilities in Amsterdam and Berlin, and is reported to be planning expansion in Stockholm and Paris. See Rana Foroohar, Alexandra Seno, Stefan Theil (2002), 'Hurray for Globowood', *Newsweek International*, 27 May, and PMSEIC (2000), *Innovation in the Australian Film Industry*, Canberra: Department of Industry, Science and Resources, Occasional Paper no. 4 available online at <http://www.dest.gov.au/science/pmseic/documents/Film.pdf>, accessed 22 May 2003.

production infrastructure necessary to attract and generate ongoing work. And they ‘play a structuring role’ as a focal point and key indicator of the health of national production.³

To date little attention has been paid either to the nature, character and variety of studio complexes or to the production ecologies comprising domestic and international activity that make up the production work of particular places. This study will map the variety of studio complexes internationally, situate Australia’s current and projected complexes within this international framework, and discuss the contemporary character of the relations between studio complexes and international production.

The studio complexes examined in this report are all outside the United States, both to indicate the international aspect of principally English-language production and to make the study manageable. There is already a considerable amount of information available about the production industry and facilities within the United States, much of which was drawn together for the US Commerce Department report, *The Migration of US Film and Television Production: Impact of ‘Runaways’ on Workers and Small Business in the US Film Industry*, released in January 2001.⁴

In this introduction we will first discuss what we mean by a ‘studio complex’, indicating our reasons for preferring this term to the more commonplace ‘studios’ as a way of describing the phenomenon. We will then discuss the several paradoxes constitutive of the studio complex. Briefly these paradoxes are:

- while they compete for parts of feature film or television production in an increasingly disaggregated production environment, studio complexes are also vehicles for aggregating production in the one place;
- while studio complexes can recreate existing locations or create new ones, thus giving the impression that a film can be made at any one of these studio complexes, the actual location of a studio complex and the facilities and personnel available to it play an important role in determining production location decisions (studio complexes are not then ‘anywhere but nowhere’, but rather ‘anywhere and somewhere’);
- while studio complexes are principally organised to service international production, they are necessarily in a relation with local/national film and television production.

This discussion helps inform our thinking on the international film industry and international film production. We outline below why we prefer these terms rather than the more commonly used phrase ‘runaway production’.

THE NATURE OF THE STUDIO COMPLEX

Our focus here is on the international studio complex. We use the term ‘studio complex’ advisedly to refer to those sites which:

- incorporate multiple sound stages usually of varying size, capable of being used for a variety of filmmaking purposes;
- provide a range of production and post-production services on site;
- comprise dedicated facilities – either purpose-built or converted from other uses – with high-quality and flexible spaces for audiovisual production;
- include some kind of backlot space – sometimes with permanent and sometimes with temporary sets; and
- are oriented, at least in part, towards servicing international production.

³ David Hancock (1999), *Film Production in Europe: A Comparative Study of Film Production Costs in Five European Territories: France, Germany, Italy, Spain, UK*. Strasbourg: European Audiovisual Observatory.

⁴ United States International Trade Administration (2001), *The Migration of US Film and Television Production: Impact of ‘Runaways’ on Workers and Small Business in the US Film Industry*, report Commerce Department, January.

Characteristic features of these complexes are their sheer size and scale, and their capacity to provide ‘full service’ to productions, either through a number of firms operating on site or facilities provided by the studio complex itself. Typically they are conceived and designed mainly to service large-budget feature film production. As most domestic production industries are unable to sustain consistent production of this type, such facilities are necessarily oriented towards the growing volume of internationally mobile feature film production.

This is not to imply that television and advertising production are unimportant to these studio complexes, because often it is television series, telemovies (sometimes called movies-of-the-week) and television commercials (TVCs) that enable continuity of production, a crucial factor given the low operating margins particularly of larger facilities. Indeed they may represent the majority of production at a facility.

It is, however, to acknowledge that the prospect of large-budget feature production, with its need for multiple sound stages, mostly animates their development; TV and TVC production typically requires one or sometimes more usually smaller sound stages and often does not utilise the full range of facilities available onsite. Large-budget features also confer local and international prestige on the studio complex and sometimes the city or region; and the reputation of a complex or region may be a factor in location decisions for future productions. Further, the large budgets of feature films also generate noticeable local impact on jobs and the local economy.

A feature of the contemporary film landscape is that there are more studio complexes of the requisite size and sophistication able to service large-budget feature film production than ever before, with these complexes located in a larger range of locations than hitherto.

Characteristically a studio complex is engaged in a continuously negotiated relationship with the international film and television industry from which it draws its business. Indeed in its contemporary form the international studio complex is both a response to, and positive reinforcer of, trends in international film and television production generally towards multi-centred production where the design of the production may be undertaken in one location and realised in others.

This phenomenon is often called ‘runaway production’. However, this term does not capture the reality of the market for international production nor the increasing trend towards disaggregation of production into its component parts, possibly occurring in multiple locations and involving a multitude of firms. This ‘market in production services’ has become increasingly global and competitive, encouraging firms, consortia of firms and regions to bid for parts of productions.

This is perhaps the main reason for the growth in the number of public agencies and commercial associations designed to attract production work. The studio complex is both an actor in and an integral part of this bidding process. The studio complex functions as a vehicle to attract and retain as much of a production as possible, which is why we see public agencies becoming involved in developing studio complexes, in order to win production and its associated benefits for a region.

THE PARADOXES OF THE STUDIO COMPLEX

Studio complexes are therefore paradoxical developments. On the one hand they are competing in the marketplace for *disaggregated* production, for parts of feature film or television production – primarily the shoot, although service facilities on site may independently bid for parts of productions not shot on the complex’s sound stages. On the other hand, by offering the full range of production and post-production services in one location studio complexes provide an opportunity to win as much of a production as possible. Studio complexes are thus a vehicle for *re-aggregating* production in the one place.

Another paradox centres on their capacity to recreate existing or create new locations, giving the impression that a film can be made at any one of these studio complexes wherever it might actually be situated. However, in practice the actual location of a complex and the facilities and personnel available to it may play an important role in determining where a production is made. So while each studio complex trades on the perception that it can service production as well as any other, its competitive advantage lies in its actual location and the facilities and personnel available to it. Studio complexes are not then ‘anywhere but nowhere’, but rather ‘anywhere and somewhere’.

For example, Martin Scorsese’s *Gangs of New York* could conceivably have been made at any studio complex anywhere around the world. But in fact it was the particular attractions of Cinecittà in Rome that

determined the location of the production. Scorsese is on record as saying that he chose Cinecittà because it gave him the opportunity to shoot on Fellini's sound stage, use a particular (already constructed) set, and work with quality craftspeople at Cinecittà in set design. It is also significant that Miramax has offices on the Cinecittà lot. For its part the major attraction of the Fox Baja complex in Mexico is the watertank constructed for *Titanic*. This tank has been subsequently used by *Deep Blue Sea* and the Bond film *Goldeneye*.

In turn the studio complexes on the Gold Coast and in Prague, for example, benefit from productions using adjacent locations. Productions locate in Prague because it can double as Victorian London or revolutionary France, or on the Gold Coast because the hinterland can stand in for a variety of natural environments; where these productions also require studio work it makes sense for them to use Barrandov or Warner Roadshow Studios. These studio complexes therefore benefit from their geographical location, including natural and built environments. Consequently, and despite the promise of being able to double as 'anywhere', the placement of the studio is important in determining what it can offer.

A third paradox of studio complexes is that they are principally organised to service international production but are also necessarily in a relation with local/national film and television production, which may sustain it to varying degrees. For example, the Fox Studios in Sydney, Cinecittà in Italy, Elstree in the UK, Studio Babelsberg in Germany and Barrandov in the Czech Republic all have an element of ongoing domestic television production including live television shows. Indeed a number of these studio complexes have dedicated buildings for television. A variety of programming for the Foxtel pay TV network is shot on the Fox lot (albeit not usually in the sound stages); approximately 50 per cent of the production at Cinecittà is for television broadcast, including extensive facilities for live events with Italian public broadcaster RAI as an anchor tenant; Elstree hosted the 2002 series of *Big Brother*; Studio Babelsberg in Berlin has since 1995 hosted Germany's most popular daily soap *Gute Zeiten-Schlechte Zeiten*, with the local regional public broadcaster, Ostdeutsche Rundfunk Brandenburg (ORB), moving to the studio in 1996. In the case of Barrandov, TV Nova, a prominent commercial television network, is based in the studio. Local television production can provide such studio complexes with a regular source of income and be of particular importance in slacker periods.

In relation to feature film production the European studios historically have often been important sites of domestic production. Cinecittà, Babelsberg and Barrandov were, for much of the 20th century, the epicentres of their respective national film industries. While Cinecittà continues to play a major role in Italian feature production – a role likely to increase with current film policy emphases favouring higher-budget quality films – domestic production at both Babelsberg and Barrandov was dramatically curtailed following the demise of communism.⁵ Recent initiatives at Studio Babelsberg – such as Studio Babelsberg Independents, a production subsidiary designed to support low-budget German films – have seen a number of German features in production, but Barrandov remains largely off limits for Czech film production.

In Australia, while Fox and Warner Roadshow have indicated their availability to local feature producers both in terms of a willingness to negotiate more favourable rates and through initiatives such as Tropnest (since discontinued), few local productions make use of the sound stages at either facility, although they do make more use of other facilities on site such as post-production. Where there is a significant relation between the two industries is in the often noted crossover of personnel between local and international production and in the opportunity that work on international production offers to below-the-line crew to afford to upgrade equipment. In this case international production is part of the employment, skills transfer and development mix.

Studio complexes are thus integral components of an international production ecology as well as, often, a national production ecology. They are substantially different in their history, character and local context, but certain similarities may also be identified. These similarities and differences – and their policy implications – are explored in this report.

⁵ For both Barrandov and Babelsberg, concentrating on international production was a way to sustain studio facilities and infrastructure at a time when the local production infrastructure and society was falling apart in the transition from communism. Nonetheless both laid off thousands of workers who worked at the studios, participating in the reorientation of the film industry to the point where domestic production virtually ceased.

THE DYNAMICS OF INTERNATIONAL PRODUCTION

International production dynamics are central to this study. Much of the contemporary thinking about these dynamics conflates international production with Hollywood. The reason for this is the global prominence in finance, production and distribution of the Hollywood majors based in Los Angeles. This thinking assumes that Los Angeles – and the US more generally – is the natural home for production and the first market for a film or television production's exhibition. In this way production outside the US is termed 'runaway' production. The US Department of Commerce report⁶ makes a further distinction, between production located outside the US for 'creative' reasons – to take advantage of particular story settings, locations and 'creatives' – the *Harry Potter* film series made in the UK would be an example here; and those which are located outside the US for 'economic' reasons – to take advantage of exchange rates, less unionised workers and various tax incentives.

But there are several problems with the use of the term 'runaway' production and the logic which underpins it. First and foremost it continues to describe in nationally defined ways a production ecology which we would argue is largely internationally, rather than nationally, defined. Film production is increasingly international to the extent that it is difficult to determine the nationality of films. This is because:

- the sources of finance for, say, high-budget feature films are as likely to be drawn from European, Asian and other North American as American sources;
- in production, the films themselves are 'multinational' in front of and behind the camera – this is not only the case for 'above-the-line' workers drawn from around the world but extends to below-the-line workers and locations involved;
- in post-production, films and television are also increasingly 'multinational' as elements of, particularly high-budget, feature films are carried out by firms in several locations;
- the distribution of films and programming is not only increasingly global but coordinated and managed for global simultaneous release.

It is additionally important not to conflate Hollywood with international production. This is because these same characteristics hold for a growing body of film, television and television commercial production which has no immediate connection to Hollywood. Here the same pattern of dispersed financing, production and post-production can be discerned. This work includes, for instance, the Japanese and Korean television commercials made in Australia and the Australian post-production houses working on visual effects for Taiwanese films. It also covers Bollywood, which has always had an international element to its films, with its critical fantasy sequences often shot in exotic locations outside India. For their part, the many co-productions that are a feature of the European and Canadian media landscapes are *ipso facto* multinational.

Similar problems attend the distinction between 'creative' and 'economic' reasons for production location decisions. First, 'economic' reasons appear, on closer inspection, to have a 'creative' component to them. This is because 'economic' reasons for production location decisions are more complex than the producers seeking the cheapest option. While cost is an important factor, it is not the only factor giving certain locations a comparative advantage over others, particularly locations outside the US over those within. A combination of factors influences production location decisions and these include but are not limited to exchange rates and wage scales. This can be particularly seen in the case of telemovies, which are often posed as the paradigmatic case of runaway production. Vancouver, for instance, has developed extensive, even singular, expertise in telemovie production over 20 years; its studio complexes and support facilities are geared to such production, and international relationships and networks connecting Vancouver with production companies and distributors have been established for telemovie production.

This suggests that rather than seeing the US as the reference point and Los Angeles as the natural and ideal home for telemovie production, it might be more useful to see Vancouver as 'the natural and ideal'

⁶ United States International Trade Administration (2001), *The Migration of US Film and Television Production: Impact of 'Runaways' on Workers and Small Business in the US Film Industry*, report Commerce Department, January.

home for telemovie production and Los Angeles as the ‘design’ centre in a globalising, disaggregated production-design network.

Second, the distinction between ‘creative’ and ‘economic’ implicitly assumes that local creative contributions can only be made to ‘creative’ runaway productions and not ‘economic’ ones. This implies a limited view of creativity and casts below-the-line workers as not making any effective creative contribution. We would suggest that this is not the case. For example, location managers finding (and convincing producers to use) particular locations have influenced storylines in a number of Gold Coast based international productions. Similarly as post-production bleeds into production, post-production workers are playing a role at an earlier stage and are involved in creative decision-making. The creativity and craftsmanship of set designers, props manufacturers, costumiers, make-up artists and so on cannot be ignored. In Cinecittà, for example, the skill and expertise of set designers and decorators is a major selling point for the studio. This suggests we need to rethink what we mean by the term ‘creative’ in relation to audiovisual production.

In an era of globalisation the increasing trends towards coordinating the design (including the financing and production) and distribution pathways internationally and across different platforms, make the idea of the US as the ‘first market’ increasingly untenable. This does not mean that the US market is unimportant – indeed it remains the most important single market for audiovisual product – but it does mean that, when productions are being designed and distribution is being planned, other markets are immediately factored in. While Hollywood producers have long taken into account revenues from international markets from a product’s conception, the near simultaneous release of feature films and a more integrated and developed market for television have increased pressures to conceive audiovisual product in global frameworks at all points in the production and circulation chain. Indeed high-budget film productions – both inside and outside the English language – are thoroughly international from conception.⁷

It should also be noted that from the turn of the 20th century Canada has been regarded by distributors, producers and exhibitors as part of an integrated North American market for audiovisual product. This is particularly the case for cinema theatrical exhibition and VCR/DVD rental markets, where the ‘US first market’ is the ‘US and Canada first market’. The fact of this integration means it is quite misleading to think of US feature production as ‘running away’ from the US when located in Canada.

⁷ As the World Trade Organization more prosaically puts it, ‘it is increasingly common for film production to be an international enterprise’, World Trade Organization, Council for Trade in Services (1998), *Audiovisual Services: Background Note by the Secretariat*, S/C/W/40, 98-2437, paragraph 10.

THE COMPONENTS OF THIS STUDY

Chapter 1, *The policy environment of the contemporary studio*, explores the contemporary enthusiasm among policymakers in Australia and overseas for the construction, renovation and promotion of dedicated, purpose-built film and television production facilities, or studio complexes. It shows this enthusiasm to be related to the growth of the market for internationally mobile production, and fits with the current policy focus on creative industries as drivers of national and regional economies. The chapter demonstrates the continuity between contemporary policies for studio complex development and previous governmental attentions to film and television, including support for the development of studios, concern for infrastructure provision, models of public and private partnerships and the development of value-adding clusters and precincts.

Chapter 2, *Mapping diversity and scope*, analyses the phenomenon of the contemporary studio complex and situates this phenomenon within a larger international production ecology. Studio complexes are grouped and differentiated on the basis of their size and location, ownership, age, the balance of the production work they undertake, the quality of infrastructure and institutional connections, and their functional profile and spatial concentration. All of these variables are shown to determine, to a greater or lesser extent, how these complexes participate in the international production ecology and how they are related to local production ecologies. Such variables are also factors determining the circumstances under which new complexes have been developed and existing ones renovated. The chapter ends by identifying three models of such studio complex development – the production precinct, the cinema city and the media city – which recognise the importance to studio complexes of how they cluster activities and services.

Chapter 3, *Case studies in development and renovation*, provides particular examples of each of the models of ‘production precinct’, ‘cinema city’ and ‘media city’ to illuminate the problems and issues around both the establishment of new studio complexes and the renovation of existing complexes. In so doing we will more explicitly situate Australia’s new and existing studio complex developments within these models.

Chapter 4, *Capturing the studio complex and its liaison networks*, considers that given the many similarities between the contemporary studio complex and its predecessors it might seem that little has changed. But similarities in physical form and function belie the substantially different place and function of these studios in contemporary ecologies of local and international production. The relations between the studio space and major production/distribution/financing companies on the one hand, and between the studio and the various productions carried on within it on the other, have discernibly changed.

Chapter 5, *Parallel and converging industries: studios and the local and international film industries*, examines the nature and character of the relationship between local and international production. The contemporary studio system is understood as linking local and international industries but in sometimes contradictory ways. Studio complexes are inescapably vehicles for a combination of parallel and converging tendencies. They will continue to operate with both a sense of separation between local and international production (if only by virtue of the location of ultimate creative and financial control) and a sense of their convergence.

The **appendix** provides synopses and key information about the international studio complexes most relevant to this study.

Chapter 1

The policy environment of the contemporary film studio

Film policy making at a national and regional or state level now includes the active promotion and development of large-scale production facilities or studio complexes. Support for domestic studio complexes has become an integral part of the portfolio of film policy initiatives alongside film training, production and script development support, and marketing assistance.

In Australia, for example, new film studio complexes have been built over the past decade or so on the Gold Coast, in Sydney, and in Melbourne, all with substantial state and/or federal government assistance, both direct and indirect. In Canada, Vancouver has become a leading production centre over the last 15 years or so due in no small part to the efforts of the provincial government, which owns one of the three major studio complexes in the city. Montreal also has two major studio complexes, and recently two purpose-built studio complexes were announced for Toronto, to be built with considerable assistance from the city and the provincial government on land earmarked for the city's failed bid for the 2008 Olympic Games.

Existing studio complexes have also been refurbished as a specific object of policy. Elstree Film Studios in London where Alfred Hitchcock made some of his early films, and more recently the first three *Star Wars* films were produced, is owned by the Hertsmere Borough Council. Over the last five years the Council has invested over £10 million in the complex, including refurbishing two enormous sound stages. From May to July 2002 Elstree hosted the third series of the British version of *Big Brother*. Cinecittà, the famous complex in Rome known in its heyday in the 1950s and 1960s as 'Hollywood on the Tiber', was partially privatised in 1998 after being state-owned since it opened as a centrepiece of Mussolini's cultural vision in 1937. Studio Babelsberg, formerly the home of the East German film industry, has received approximately €500 million in assistance from the European Union, from the German federal government, and from the Brandenburg state government in the 10 years since it was bought by the now troubled media conglomerate Vivendi Universal. Some of these studio complexes were built or renovated primarily to attract international productions, others to cater to both local and international productions.

Owing to the scale, cost and high-profile character of these developments, governments often need to be brought in at the highest level not only to smooth their path through the necessary bureaucratic processes – planning, environmental and heritage assessments – but also to support these projects either by investment, providing loans or making available public land on favourable terms. The prestige and symbolic importance of these developments as 'signature initiatives' often attracts the interest of government, and this interest is often critical to the success of the project. These developments are also attractive to governments because they are perceived: as important generators of employment both in the film industry and related service industries; as export-oriented developments; and as more environmentally friendly than many other manufacturing industry developments – and in the cases of Toronto, Sydney and Melbourne they also provide a productive and effective means of cleaning up problem, polluted areas. For its part, the international production industry has come to depend on this 'friendliness' of governments tangibly and intangibly to facilitate the development of the necessary infrastructure, which includes the studio complex.

How are we to understand this contemporary policy enthusiasm for the studio? Under what conditions has this quite intensive investment and governmental support emerged? How does it relate to past periods of studio activity and construction? What are the contemporary studio complex models and how do they differ from previous models? How are the expectations and objectives of film policy changed when a studio complex becomes part of the mix? How do studio complexes alter the relation between domestic and international production? Does support for the studio represent a new 'turn' in film policy making or an incremental development? How, in the face of the very substantial activity studio complexes generate, do policy makers go about maintaining and developing their local studio complexes? These are some of the questions our research is addressing.

OLD AND NEW PERSPECTIVES

It would be tempting to see support for studio complexes as a qualitatively new policy development which alters the very terms of film support. In this view the focus on studios represents the substitution of industry policy for cultural policy; infrastructure support displaces support for the development of content; jobs are foregrounded at the expense of previous priorities for cultural identity and development; cross-sectoral partnerships become the focus instead of a bounded film milieu; information and communication technology capacity development in clusters of firms and value-chain thinking take over where there was previously support for individual productions in certain forms of film and television content (feature films, documentaries, experimental production and mini-series).

From this perspective the studio complex is seen to replace both the rationale for and the mechanisms of traditional film support, representing a profound subversion of existing policy instruments. Certainly that has been the underlying fear of many film agencies, film critics, and union and production industry representatives. And this fear has been compounded as studio complexes seek to attract international productions to sustain their facilities, pay their bills and make a modest profit. Policy making involving studio complexes seems to confront longstanding priorities for dreaming our own dreams and showing our stories to the world. Cultural development appears to be eclipsed by a more 'economic rationalist' focus on industry development.

Our view is that in policy terms there is not the great distance between a focus on studio development and previous governmental attentions to film and television that might be claimed. There are a number of reasons why we need to be cautious in discussing studios as a radically different or new departure in film policy, namely:

- governmental support for the development of studio complexes is not new;
- there is a long history of infrastructure provision in film policy making which studio complexes connect with;
- public and private partnerships are neither new for governments nor unfamiliar in film policy making;
- the idea of developing value-adding clusters and precincts has extensive governmental precedents;
- although support for studio complexes is clearly about the relation and intersection between international and national production systems, this relationship and the accompanying concern with integrating local with international production and financing infrastructures is not new.

We will now deal with each of these in turn.

Government support for studios

Ardmore in Ireland, Cinecittà in Italy, Babelsberg in Germany, Barrandov in the Czech Republic, have all been supported by their national governments over several decades. In British Columbia (BC), the provincial government has played a prominent role in facilitating studio complex construction, and controls one of the largest studios in Vancouver, The Bridge Studios, through the British Columbia Pavilion Corporation.

So state support for studio complexes is not new. And neither is it confined to centres outside the United States. In 1999, New York's Kaufman Astoria Studios, founded in 1920 as a production centre for the then major Famous Players/Lasky, announced a US\$8.3 million expansion of its film production facility including the construction of a seventh sound stage. In an example of cross-sectoral partnerships at work in the US, initial funding of US\$2.5 million for the expansion came from the New York City Council, New York State provided US\$1.7 million in grants and loans through its Empire State Development Corporation, the borough of Queens contributed financial assistance in the form of a US\$125,000 grant from the borough president's office, and the New York City Economic Development Corporation, which is leasing the land for the expansion on a long-term basis, also made available a US\$1.2 million loan.⁸

⁸ Charles V. Bagli (1999), 'A New Idea of "Get me the coast": Hollywood's Major Competition Is in Western Queens', *New York Times*, 5 August, p. B1. John Toscano (1999), 'Astoria Studios to Build 7th Sound Stage', *Western Queens Gazette*, 11 August, available online at http://www.qgazette.com/news/1999/0811/Front_Page_Folder/Astoria_Studios_To_Build.html; accessed 22 May 2003.

For their part Australian governments have, in the past, funded the building of broadcasting and film infrastructure at the ABC, Film Australia and SBS. Similarly there is a history of state film policy support for the development of studio complexes. When the South Australian Film Corporation (SAFC) was established in the early 1970s a studio facility to attract feature film and television production to the state was integral to the package of film support. The Queensland initiatives of the late 1980s and early 1990s are a variation of these developments.

Previous Australian government support for studio complexes was couched as support for public service broadcasting, the national broadcaster, and the 'National Interest Program' of the government's film unit (Film Australia). Government-owned studio complexes in Italy, Germany and the former Czechoslovakia were likewise designed as 'national' flagship institutions with varying kinds of public service style remits.

The recent partial opening up of these 'government' studio complexes in Australia to the commercial sector and independent producers is a consequence of both the broader governmental expectation that public agencies be more enterprising in generating income, and an industry-specific focus on outsourcing production in line with changes in thinking about how independent producers might best interact with national broadcasting and the government film unit.

While publicly funded studio complexes have been used for some time now by the independent film and television production industry, and Film Australia has regularly been advertising its studio and post-production facilities and its stock footage, this sort of infrastructure support differs from today's support in several ways. First, the public broadcasting entities are opening themselves up to independent production as a means of meeting public service broadcasting programming and policy requirements. Second, their principal business is their own production capacity rather than earning revenues and other benefits from opening their facilities to all comers on a competitive basis, as the commercial studio complexes must.

In South Australia, studio development in the 1970s was seen by the SAFC as pivotal to securing production in a state without significant facilities. In this case the contemporary studio complex developments are prefigured by the SAFC studios. By being governmentally controlled this complex maintained government accountability, making the studio and state film policy synonymous. But this introduced an element of tension between the government's desire to keep the studio complex occupied and the government's desire to create and support an independent film and television production enterprise in South Australia.

Contrast this with the formal separation between the Pacific Film and Television Commission (PFTC) and the Gold Coast complex. The PFTC's brief is to enable both local and international production in Queensland. This may sometimes involve the studio complex, and sometimes may not. Today's governmental support is for a studio complex which is not principally for government-assisted production, but rather is open to all types of production on a competitive basis.

Infrastructure provision

The second way to think about contemporary policy developments is in terms of infrastructure provision.

Support for the studio complex is clearly part of a historical and big-picture emphasis on building capacity through infrastructure provision. The concerted interest in film policy from the late 1960s took for granted the value of infrastructural development, particularly in relation to film training. The Australian Film, Television and Radio School and in the Victorian case the Swinburne (now Victorian College of the Arts) Film School both represent a sustained commitment to infrastructure at the level of film training institutions. Studio support has more in common with the 'infrastructure thinking' that led to the development of the AFTRS and VCA/Swinburne than it has with the support for individual productions or the production slates of particular companies represented by such mechanisms as subsidies, concessions or the Film Licensed Investment Company (FLIC) scheme.

Studio complex support also bears a close resemblance to contemporary moves in cultural policy to rethink 'cultural production' support mechanisms away from subsidies for individual productions to support for capacity building. Studio complexes represent different ways of thinking about the problem of securing the future of production industries. Studio complexes are supported for their potential to generate additional domestic capacity and to ensure that the local filmmaking milieu remains technologically competitive. Support for studio complexes encourages the evaluation of film policy and measurement of the success of

the industry by a variety of indicators other than the traditional cultural indicators of numbers of films produced or hours of domestic television production made and screened. Instead, focus can turn to indicators such as the size of production companies, and the number, range and size of production support services.

Private and public partnerships

The current film financing model through the Film Finance Corporation (FFC) and the Australian Film Commission (AFC) is one of private–public partnership, with public monies triggered by private investment. What is new here is not the partnership as such, but its terms. The large studio complexes under discussion are built on new alliances between private and public sectors – in this case between media production companies, studio infrastructure providers and governments. These alliances are characteristic of broader trends in cultural policy making which stress partnerships between government and private enterprise. Studio complexes are also part of the ‘major projects’ thinking and mindset of governments. They are ‘big ticket’ items which require often considerable public assistance to become established. The Victorian state government will outlay \$40.2 million over 20 years on the studio development at Docklands, while the Department of Innovation, Industry and Regional Development estimates total returns to the government will amount to \$43.9 million over the same period.⁹

Like their production support counterpart schemes, public support mechanisms are designed to encourage studio complex development in one place rather than another. As major signature private and public sector partnerships, studio complexes represent a negotiating arrangement where the private partner is the one to be persuaded to come and then be assisted and facilitated. Just as governments competitively bid for and provide sweeteners to secure the branches of the Guggenheim museum or Disney theme parks, so too governments work hard not only to secure private investment in construction and studio management, but also to attract core or anchor tenants, large and small productions, production services, and post-production companies.

Studio complexes are ‘dream factories’. What they produce is the stuff of entertainment, so they and their products (films, television programs and so on) enter the public imagination. But they are also the site of policy dreaming. Studio complexes and filmmaking symbolise glamour and celebrity; they help design or define the intangible property of individuals, firms and places: that is, their image or reputation. They are valued for their stimulation of the imaginary, for their fit with the culture of their own location, for their effect on the culture and mindsets of individuals and communities.

Value-adding clusters and precincts

The idea of developing value-adding clusters and precincts has extensive precedents in urban planning, particularly planning for cultural facilities and precincts. Remember the fashion of the 1980s for synergy, co-location and the ‘multifunction polis’? The 2001 US Department of Commerce Report described film production as a ‘locomotive’ industry because ‘the number of production workers directly working in the industry belies the true impact of the industry on the economy because so many upstream, downstream, and peripheral industries depend on the primary production plant’.¹⁰

Studio complexes are increasingly being recognised as among the most powerful engines of the locomotive. Early on in the development of the Gold Coast complex this thinking revolved around securing a range of tenants with sufficient expertise to enable the complex to function as a ‘one-stop-shop’, where all production and post-production needs could be met in one place. A large number of individuals and companies relocated to Queensland from Sydney and Melbourne to be close to the complex. But this early development of a creative cluster was focused solely on the studio complex and film or television production which might be carried out there.

Now, increasingly, it is being recognised both here and elsewhere that studio complexes seed innovation and enable a range of creative work above and beyond what might go on in the complex itself. Filmworkers are drawn to the area to be close to the action. But a range of other creatives – games

⁹ Auditor-General Victoria (2003), *Report on Public Sector Agencies*, February, p. 186.

¹⁰ United States International Trade Administration (2001), *The Migration of US Film and Television Production*, report Commerce Department, January, p. 5.

designers, software developers, musicians, model-makers – are also drawn there. The co-location of interrelated firms and industries has what Allen Scott has termed ‘emergent effects’ – synergies leading to innovation – which result from agglomeration or clustering.¹¹

Over the past five years these characteristics of studios, what they enable as well as what they do, have begun to be recognised. In part this is due to the ways studio complexes are now articulated in policy discourse to a variety of new economy goals: building knowledge, fostering innovation, allowing creativity to bloom. Studio complexes are integral parts of what are variously called creative, cultural or ‘copyright’ industries, and are therefore central components of new service-industry-based economic strategies.

A virtuous circle is now entertained in which governments can promote the creative industries while continuing to seize on the direct and indirect value and potential of film and television production to drive employment and economic growth. Clustering becomes a policy of seeding innovation. Creativity is seen as proceeding from clusters. Governments have become interested in developing film services through studio complexes. Such services can be either aggregated together as when co-located film service companies (labs, production companies, sound and visual effects companies) all work on the same film but can also be disaggregated as when the same companies work on different productions.

Rethinking the relationship between local and international production

This brings us to the fifth aspect of our thinking about studios and policy.

Studio complexes oriented primarily to international production are parts of a mobile, fluid, slippery international production ecology, articulated to and in a range of contemporary media discourses and developments. We can relate production in a particular place to broader industrial trends: international production levels; the relative importance of particular markets; the prominence of the co-production as an industrial norm; the tendency towards agglomeration and the creation of multinational megamedia corporations at one end of the scale and their interaction with a growing number of small firms at the other; and the adjusted role and objectives of state and national government and of media policies.

Attention to the histories and to the industrial and cultural contexts in which these studio complexes operate can provide an insight into the international political economy of audiovisual media production, since the film and television production industry is at some levels a model global industry, involving as it does the movement of (some) people, capital – both investment and cultural – information, goods and services across national borders.

In many cases the new and refurbished studio complexes are evidence of the globalisation of Hollywood, since many are used or part-owned by the same multinational media companies which own the major Hollywood studios. As a recent article in *Newsweek International* argues, Hollywood is no longer a place, it’s a state of mind. The article painted a picture of the major studios roaming the earth in search of the new magic formula. Four of the Hollywood ‘seven sisters’, the seven majors (often misleadingly referred to as the Hollywood studios), have begun making films and remaking American films in a number of languages other than English. Last year Columbia distributed a Chinese-language comedy called *Big Shot’s Funeral* co-starring Donald Sutherland, which has become the highest-grossing Chinese language film of all time. Meanwhile, Warner Brothers, long-time partners of Australian media giant Village Roadshow, is also reported to be focusing on local-language productions to drive the corporation’s global growth.¹²

But the studio complexes where much of this production will take place are also parts of a local, regional or national production ecology or cultural sector, rooted or embedded in place, featuring as employers or workplaces, as physical presences or landmarks in the built environment, and as economic drivers. While we can trace the expansion of a competitive market for international production, we must acknowledge that it is always to some degree linked to the production ecology of particular cities, regions and countries. So we can describe the history of production in a particular place, measure it as far as possible in the networks of companies and levels of inter-firm transaction, identify key actors, project the multiplier effects of production spending on local economies and employment levels, estimate the industrial muscle of

¹¹ Allen J. Scott (2000), *The Cultural Economy of Cities: Essays on the Geography of Image-Producing Industries*, London: Sage.

¹² Rana Foroohar, Alexandra Seno, Stefan Theil (2002), ‘Hurray for Globowood’, *Newsweek International*, 27 May.

particular key firms and individuals, and attempt to predict the future growth (it's always growth) of levels of production and other key indicators.

Various local and national governments provide a range of incentives to encourage film production activity in their jurisdiction, including, now, the state of California. Most are directly related to the development of an extensive market for international production, which has also prompted the renovation and construction of production infrastructure, usually with substantial assistance from public authorities.

The international orientation of film policy is a variation on an old theme, but taken to a more organised and systematised scale. Co-production treaties have long provided an instrument for bringing local and international production together. Continuities have always been sought between domestic and international production through patterns of international investment in local film and television productions. What may be new here is not the support for 'international' involvement in the financing of Australian-based productions but support for international productions as such as part of the business model for studio complexes. Governments around the world are busily developing direct or indirect assistance packages to offer to production companies in a bid to construct competitive studio complexes and maximise opportunities for international production. Many of these studio complexes are part or fully owned by one of the major Hollywood studios or an associated company.

Production and investment by Hollywood studios in Europe grew in the late 1940s and 1950s as a result of post-war currency controls and other reconstruction measures. But again it is important to remember that both international production and international studio investment were not new developments for the majors at this time either. In the 1920s, Paramount, Warner Brothers and Fox had all invested in studio facilities in London.¹³ Paramount also operated the Joinville studio in Paris, and had a co-production deal in the 1920s with the major German film company Ufa, which owned the Babelsberg Studios near Berlin.

The factors driving production away from the United States in the period after the Second World War are still very much evident today: producers' desires to reduce costs, particularly labour costs; less prohibitive union work rules and rates; access to tax shelters; currency fluctuations; a desire for 'authentic' or exotic locations; and the generation of additional international market appeal through the use of foreign talent and locations. But the trend is cyclical, depending in particular on the strength or weakness of the US dollar, and perhaps on the balance between box office earnings in America and internationally of films produced or distributed by the Hollywood majors: when international box office earnings are high, production will tend to flow offshore. And whereas in Europe after the Second World War infrastructure investment by international companies was an indirect result of measures to reconstruct domestic economies, including restrictions on the expatriation of American dollars, now the attraction of international production or the development of studio complexes is a specific object of policy.

Responding to the trend towards internationally mobile production, centres outside the United States which have attracted international production over the last half century have developed a variety of strategies to retain and grow their share of this lucrative but volatile market. A key to the success of certain centres has been the existence of a studio complex or cluster of filmmaking activity.

While some infrastructure developments, such as those in Malta related to niche underwater services, do focus exclusively on international production, understanding the contemporary studio complex as a part of film policy involves seeing it as a vehicle with the potential to bring the local and the international into a productive relationship. Indeed there is an implicit and sometimes explicit assumption that 'international productions' will 'cross-subsidise' domestic capacity in some way, through technological renovation, skills development or some other mechanism.

Studios may help establish and maintain the presence of international production, but this may operate in parallel to – sometimes with few direct connections with – the local production industry. Studios may provide opportunities for constructing convergences and connections between the different sectors (through crew mobility, for example). And they may create a new problem: the need for policy making and the local industry to develop convergent and productive relations between the international and the domestic industry.

¹³ In addition to the American interests in Britain, the French company Pathé opened studios at Alexandra Palace in north London in 1913. See Robert Murphy (1986), 'Under the Shadow of Hollywood', in Charles Barr (ed.), *All Our Yesterdays: 90 Years of British Cinema*, London: BFI.

Studio complexes seem to encourage the simultaneous existence of parallel and convergent dynamics. We can see this in Italy where Martin Scorsese made *Gangs of New York* on part of the Cinecittà lot, while Italian film and television production continued on other stages. We can see it in Sydney, where television production for Foxtel channels coexists with *Star Wars*, or where Animal Logic, one of the tenant service companies based on the Fox lot, works simultaneously on post-production of *Moulin Rouge* and the low-budget Australian feature *Mullet*. And we can see it on the Gold Coast, where crew working on *Scooby Doo* make time on weekends to work on short films.

RESURGENCE OF THE 'STUDIO IDEA'

All of these things – a history of governmental support for studio complexes, an interest in infrastructure provision, evolving forms of public–private partnership, a developing focus on clusters and creative industries, and consideration of the relationship between international and local production – have spurred a resurgence of what we term 'the studio idea' in policy making.

What is significant about the studio idea as part of contemporary film policy development is the incremental adjustment to film policy it represents. Studio complex support can be regarded as adding a film services dimension to film policy and production support. In Australia as in Canada, the UK and Italy, support for studios is coupled with continuing support for individual films and for a local industry. As in other areas of the arts-related industries, support for individual productions and particular production companies continues alongside a more infrastructure-oriented support for film services.

However, the incremental policy adjustment we see in contemporary support for studio complexes reflects a concern as much for the existence of facilities, capacities and technological renewal as for production per se. The turn to studio complexes does not represent a wholly new governmental interest in building infrastructure, nor does it represent a new turn in film policy towards private and public partnerships.

What is new is that studio complexes have become a specific objective of policy and this has led to very explicit attention to their nature and character, and to the 'fit' between studio complexes and a variety of broader governmental policy objectives and priorities.

Chapter 2

Mapping diversity and scope

Studio complexes come in a variety of shapes and sizes. In this chapter we identify a number of variables which provide a useful way of both grouping together and differentiating between studio complexes. These variables are:

- size and location;
- patterns of ownership and management;
- quality of infrastructure and institutional connections;
- the balance of film, television and other production work conducted in or enabled by the studio;
- when they were built;
- functional profile and spatial concentration of production and service companies.

We will now discuss each of these variables in detail.

SIZE AND LOCATION

The question of size cannot easily be separated from the question of location: studio complexes comprising multiple sound stages, backlots, offices and related buildings require a lot of space; and only certain locations have the requisite space available.

Historically, studio complexes were located on the outskirts of cities in areas Peter Hall describes as ‘edge city’ developments¹⁴ where land was cheap and plentiful and there were few other competing uses.¹⁵ Typical examples include many of the European studio complexes – Elstree, Shepperton, Pinewood in the UK, Cinecittà in Italy, Babelsberg in Germany, Barrandov in the Czech Republic, Ardmore in Ireland. Some recent developments like Leavesden in the UK – where the Harry Potter films are being made – conform to this model.

However, more recent developments do not always fit this pattern. On the one hand there are now a variety of studio complex developments situated in or proposed for inner-urban areas – Fox Studios in Sydney and the Melbourne and Toronto developments spring to mind. In these cases their inner-urban location owes much to the intervention of governments to redevelop public land or zoned commercial land for filmmaking, based not on immediate commercial considerations but on the expected externalities resulting from the development of studio complexes.

In all three cities – Toronto, Melbourne and Sydney – the studio complex developments are part of broader dynamics of city governance and planning emphasising urban regeneration and looking to their studio complexes as much for their symbolic contribution to place marketing and identity making as for their commercial value. Such developments also have the advantage of proximity to existing inner-urban film and television industry clusters and other cultural and entertainment industry precincts. This coming together of wider public and particular film industry development purposes characterises these ‘flagship’ developments for their respective cities.

On the other hand there are a range of regional/rural locations both developed and currently proposed which are not adjacent to major metropolitan areas with substantial media infrastructure. These developments are motivated by two logics. The first is to take advantage of an existing location production industry to retain within the region as much of the production as possible where previously the region only hosted part of the production shoot. This logic is writ particularly large for proposed developments in

¹⁴ Peter Hall (1999), ‘The Future of Cities’, *Computers, Environment and Urban Systems*, vol. 23 no. 3, pp. 173–185.

¹⁵ The notorious fogs which blanketed London in the early part of the 20th century contributed to decisions to locate studio complexes on the metropolitan outskirts where the air quality, particularly visibility, was better.

Cairns and Cornwall. Here both locations have featured in a number of high-budget feature film productions as well as television productions and television commercials. But the absence of a purpose-built studio complex has limited their capacity to attract and retain whole productions.

The second logic behind regional/rural studio complex developments is their contribution to the economic development of particular regions. This contribution is seen as a means of diversifying the region's economic base by helping create cultural product clusters. Studio complexes also have intangible symbolic benefits for a region, sometimes assisting in the promotion of other industries, particularly tourism-related industries.

The Gold Coast complex was initially developed in circumstances where the surrounding region had the potential to attract location production but was not at the time a major film location destination. It was, however, an example of an attempt to diversify Queensland's economic base, to create a film industry infrastructure where previously there had been no infrastructure of significant scale, and to contribute to the promotion of the region as a tourism, leisure, and entertainment centre.

The co-location of a theme park, Warners Movie World, with a studio complex exemplifies this logic.¹⁶ Significantly many more recent developments incorporate a theme park element for precisely these reasons. The Fox Baja complex in Mexico, for example, has clear synergies with efforts to build on the tourism potential of the Baja California region, which is acknowledged in the development of the 'Foxploration' studio tour. The Rosarito site was chosen primarily for its geographic location – close to the southern California epicentre of English-language audiovisual production – but also perhaps to take best advantage of incentives and advantages to locate in Mexico under North American trade rules.¹⁷

Usually these two logics work synergistically, with studio complexes following an existing production location industry and promoted in terms of regional economic and symbolic benefit.

The key example here is Vancouver in the 1980s. Prior to the construction of The Bridge Studios, the first studio complex in the region, Vancouver and its surrounds had been the site of numerous films and television productions – *McCabe and Mrs Miller*, for example.¹⁸ The development of a studio complex was undertaken to diversify a regional economy previously dependent on primary industry. Importantly it required substantial investment and assistance from the provincial government. Vancouver now has three major studio complexes and approximately 50 sound stages. It is the North American centre for telemovie production and has, as a consequence, become a major media city. Vancouver was additionally advantaged by its functional proximity (a three-hour plane flight) to Los Angeles, and its west coast location, allowing it to share the same time-zone.

The size of the studio complex is an important determinant of the kind and variety of work it is capable of hosting. The Gold Coast complex was not of sufficient size to host a high-budget feature production as well as continue with its 'signature' telemovie and long-running TV series work. So the filming of *Scooby Doo* at the complex forced one of the 'anchor tenants', the production company Coote/Hayes, to relocate production shoots elsewhere. Even with the addition of two new sound stages in 2002 the complex remains limited in the amount of work it can host at any one time. In the case of Cinecittà on the other hand, its 22 soundstages, permanent sets and large backlot make possible the simultaneous production of a number of projects across the different genres.

Particular locations can function in equivalent ways to a studio complex even when there isn't an actual facility, owing to their geographical clustering of production and production services into particular industry precincts. Both Toronto and Sydney were able to attract – and in Toronto's case continue to attract – high-budget feature production in the absence of a large studio complex. Toronto's extensive film production services infrastructure is a consequence of the fact that it is both the centre of English-language Canadian

¹⁶ It should be noted that the theme park was the 'hook' for Warner Brothers to enter the studio complex deal, with film production capacity or income from sound stage rental lesser considerations.

¹⁷ The border regions of Tijuana, Mexicali and Ciudad Juárez have become centres of electronics manufacturing, particularly of television sets, as a result of transnational corporation investment over the 1990s, drawn by regional comparative advantages including proximity to the US, political and labour stability, and an available, flexible, lower-cost labour force. Investment was also drawn by open trade policies, deregulation of the electronics manufacturing sector and the heavy promotion of foreign direct investment. See Jorge Carrillo (2002), 'La industria de los televisores en México: Integración y proveedores locales en Tijuana', *Asian Journal of Latin American Studies*, vol. 15, no. 1, pp. 5–42.

¹⁸ See Mike Gasher (2002), *Hollywood North: The Feature Film Industry in British Columbia*, Vancouver: UBC Press.

media production and has, for many years, hosted a significant amount of international film and television production. Its dispersed but nonetheless geographically concentrated facilities and service companies, and increasingly its post-production facilities – all connected by high-speed data networks – have permitted Toronto to remain competitive. However, it is interesting to note that the city is now seen to require a large digital-ready studio complex.

PATTERNS OF OWNERSHIP AND MANAGEMENT

There is no one common pattern of ownership and management for contemporary studio complexes. But they can be grouped in terms of the balance and share of public and private interest in the parent company and levels of connection with international media companies. Studio complexes can also be distinguished on the basis of the ‘exclusivity’ of their service provision arrangements – that is, the extent to which the complex determines the mix of service companies operating on the site and whether it has a commercial interest in onsite service providers.

Among those which are wholly privately owned, we can distinguish between those owned or part-owned by Hollywood majors or other major international media conglomerates on the one hand, and those controlled by mid-range media companies or companies which are not primarily media companies on the other.

Examples of the first group include the Fox studios at Baja and Sydney; Warner Roadshow Studios at the Gold Coast; and Lion’s Gate in Vancouver and Babelsberg, both owned by Vivendi. Examples of the second include Barrandov, owned by the utility company Moravia Steel; Vancouver Film Studios, owned by the McLean Group; Media Pro Studio in Bucharest, owned by Central European Media Enterprises; Ciné Cité Montreal, owned by the Comweb Group; and Shepperton and Pinewood, owned by the Pinewood-Shepperton Group. It might be noted that a proportion of these privately owned studio complexes were previously owned by governments – Cinecittà, Babelsberg, Barrandov, Mafilm in Hungary, and Ardmore in Ireland.

Studio complexes owned or part-owned by governments – national, state (provincial) or local government authorities – include The Bridge in Vancouver, run by a crown-owned enterprise of the provincial government; Elstree, which is owned by its local borough council; and the soon to be completed Melbourne film studio complex.

How do we explain this diversity of ownership and what relationship does it have to the development of a studio complex?

Diversity of ownership is a likely consequence of the local circumstances and the range of expertise and attributes necessary to develop a studio complex in a particular location. Characteristically the establishment of a studio complex entails a complicated and lengthy dealmaking process stretching over several years and requiring the coordination of governments, investors, production service companies, property developers, architects and publics.

The company or consortium proposing the studio complex needs to have certain attributes:

- it must have credibility within the local and international film and television production industry, in order to have the prospect of attracting both service companies and ongoing production when they open;
- to negotiate the various bureaucratic and political hurdles it must be politically well connected;
- it needs to have the confidence of investors as both managers of the property development and managers of large-scale film infrastructure;
- it needs to be able to mobilise public opinion favourably on behalf of the development and effectively counter criticism; and
- it needs the capacity to handle the sophisticated project management required for the planning, construction and operation of the complex.

Public–private partnerships have been particularly important in the development of some complexes, both publicly and privately owned. For instance, the partnership between the Queensland Government and the commercial operators developing the Warner Roadshow studio complex included a package of soft-loans,

the leasing of land on long-term and favourable rates, and assistance in attracting tenant service companies. This partnership is a continuing one. For its part the crown-owned enterprise of The Bridge Studios in Vancouver partnered with MGM in 1997 to open a 25,000 square foot studio in which the BC government invested C\$3.5million.¹⁹ The very nature of the contemporary studio complex mandates some sort of ongoing public-private partnership.

In most cases governments take a back seat in any partnership, facilitating the private ownership of these facilities by providing tangible and intangible support to the owners at critical points in the design, approval and construction phases. Sometimes, however, in the absence of private investment (as was the case initially for The Bridge, Vancouver) or when there is a hitch and institutional investment is not forthcoming (as was the case for the original Studio City proposal for Melbourne's Docklands) governments can take a more prominent role.

Ownership and management can be issues in the way **service provision** is arranged on the studio complex site. Service provision can be an ownership issue where the complex owners have a commercial interest in the service providers operating on the site. It can be a management issue where the studio complex enters into arrangements with independent companies to encourage them to locate onsite. These arrangements may involve an exclusivity agreement whereby in return for an independent service company's commitment to rent space onsite for a period of time, the complex management agrees to limit the number of companies offering the same services, or exclude competing companies altogether.

Under the terms of the relevant trade practices act or its equivalent, producers hiring sound stage space in a complex cannot usually be required to use onsite companies, although in the course of negotiating terms and rates, a deal may be negotiated which makes the use of onsite companies and services more attractive to producers.

Some studio complexes advertise their capacity to provide 'full service' to production, meaning the complete range of pre-production, production and post-production services is provided by the operators of the studio complex or companies with common ownership structures. The 'one-stop-shop' is a similar arrangement, with the full range of services either supplied by the studio complex itself or facilitated by the complex in partnership with independent companies.

Some studio complexes provide only certain services themselves, while others are 'dry-hire' or 'four wall rental' spaces, meaning that the empty sound stages are rented and all equipment necessary for filming must be brought in or rented from companies either on- or off-site.

Ownership and management structures may have a bearing on the **business model** used by the complex. The rental of sound stage space alone is not a particularly profitable activity and studio complex operators usually augment their revenue from a number of sources. This may include the provision of film services (for example, equipment hire, props and wardrobe hire) and other entertainment or tourism services like cinemas, studio tours or theme parks by companies connected with the studio complex, and the rental of space to independent film service companies or broadcasters. A number of studio complexes are owned and managed by property development groups and the studio complex may be part of a business park. In some cases the studio complex may be co-located with residential, retail and hospitality development. Being part of a larger site rather than just a 'stand-alone' operation has provided considerable benefits to both studio complexes. As Henry Tefay puts it, to 'make a studio economically viable' it is helpful to have 'other things happening' so that maintenance, security and power and all those ongoing costs can be covered within a larger framework.²⁰

What bearing does ownership have on the **work** of a studio complex? Ownership still matters but not in ways we might think. It might be assumed that ownership by a major media corporation would lead to use of the studio complex by productions associated with that corporation. However, the disaggregated nature of contemporary international production provides no guarantee that any of the major media corporation's

¹⁹ Neil M. Coe (2001) 'A Hybrid Agglomeration? The Development of a Satellite-Marshallian Industrial District in Vancouver's Film Industry', *Urban Studies*, vol. 38, no. 10, p. 14.

²⁰ Tefay indicated that its 'stand alone' character may have counted against the proposal to turn Brisbane's old Tennyson Powerhouse site into a studio complex: 'if it was standing empty it would be costing a lot of money'. It would be better to have it as part of a larger operation or precinct where these ongoing infrastructure costs could be partially met as part of larger operations and other functions. Henry Tefay, Pacific Film and Television Commission, interview with the authors, 28 June 2001.

production work will be put through its own studio complex. So although we can identify a group of studio complexes that are owned or part-owned by international media conglomerates, productions financed or part-financed by these same conglomerates are as likely to be made outside as inside their studio complexes. For example, the three *Matrix* films co-produced by Warner Brothers and Village Roadshow were made at the Fox lot in Sydney, while Fox has made a number of telemovies in Queensland.

But ownership, or rather the *name* of a studio complex, can have an important bearing on the volume and type of work attracted to the complex. For example, while the Gold Coast complex is much more closely associated with the Village Roadshow group of companies than with Warner Brothers and its affiliates (with more Village Roadshow productions using the complex than Warner Brothers productions or joint Warner Brothers–Village Roadshow productions), the complex is called Warner Roadshow Studios because the name ‘Warner’ is more instantly recognisable to international producers and connotes familiarity, credibility and prestige.

In general terms though, the ability of a studio complex to attract international work may have less to do with its ownership by major corporations and more to do with a range of other factors including currency exchange rates, levels of incentives available in a territory, the ‘film friendliness’ of local authorities, the pool of local talent, the degree to which the studio complex and related onsite businesses are plugged into international networks and so on.

The professional and industry networks of the studio complex management team – and in some cases those of the owners – are an important factor, but one that is difficult to quantify. For example, Rainer Schaper’s professional connections while head of Babelsberg were important to re-establishing the complex as a site of international production, with *Enemy at the Gate* and *The Pianist* both coming to Babelsberg through his connections. Michael Lake has similarly been a key figure in the history of the Gold Coast studio complex: Lake facilitated the migration of a number of former colleagues at the Melbourne-based production house Crawfords to Queensland in the early 1990s to establish a production presence on the Gold Coast, and more recently through his base in Los Angeles, he has been instrumental in marketing the complex and familiarising powerful industry players with what it has to offer. For his part, Paul Bronfman, the head of Comweb Corporation and a co-president of the development of the Great Lakes Studios complex in Toronto, brings to this new studio complex the relationships and expertise he developed previously in creating the North Shore Studios in Vancouver.

QUALITY OF INFRASTRUCTURE AND INSTITUTIONAL CONNECTIONS

The quality of infrastructure within studio complexes is a primary feature distinguishing them from temporary or single-use facilities. Their capacity to attract international production critically turns on their infrastructure. Quality of infrastructure is, however, not just about the facilities inside the studio complex but also, and just as importantly, about the quality of related infrastructure outside the complex.

Inside the studio complex, infrastructure has traditionally included sound stages of the requisite size and flexibility, adequately sound-proofed, powered, often air-conditioned, and serviced by adjacent production offices and mills, or construction workshops. The load-bearing capacity of sound stage roof is also a consideration here, and one which sometimes advantages purpose-built complexes over converted spaces, since not all warehouses or factories will have roofs strong enough to bear the load of lighting and other necessary equipment.

The presence of specialised craft and production workers and associated services including set decoration, equipment hire, film processing and post-production services are essential for a complex to claim that it is a full service or ‘one stop shop’ facility. Special features such as internal and external watertanks, permanent sets such as the 747/400 mock up originally sited at Fox Studios and subsequently relocated to the new Serenity Cove complex in Sydney, the city street backlots in a number of studio complexes, or historic sets such as those in Cinecittà, all add to the attraction of particular studio facilities.

Increasingly studio complexes are now expected to be equipped to service the needs of digital production and post-production. ‘Digital readiness’ is becoming the benchmark against which studio complexes are measured and market themselves. Studio complexes are required to have high-speed fibre optic networks to enable digital transmission between service providers within the complex and outside. The growing interconnection between production and post-production – for example the incorporation of visual and sound effects planning at earlier stages in the production process or the use of digital intermediate masters

to enable image manipulation during the production process – increases the importance of the controlled environments offered by studio complexes, but also places new requirements on complexes wishing to offer ‘full service’.

The capacity of complexes and service providers to meet the digital needs of producers is an increasingly important factor in the marketing of particular locations. Cinecittà and Babelsberg, for example, tout their state-of-the-art digital facilities alongside their skilled artisans and permanent backlot as a primary reason to film there. As complexes that have been operating for several decades, they have had to be extensively and expensively refurbished in order to offer such facilities. But digital readiness comes at considerable cost even for those complexes able to incorporate a digital plan from inception. For example, a proposed facility for Tokyo will cost an estimated US\$1 billion.

In terms of the infrastructure *outside* the studio complex, producers look for, among other things:

- the talent pool, particularly of below-the-line workers, and its ability to provide production units of the necessary standard. Productions do bring in their own crew, often for key positions, and employ local workers in a more junior capacity, with the extent of this practice depending on labour agreements, immigration regulations and the needs of the particular production. For example, proactive film unions have played a leading role in the development of Vancouver as a production centre;
- the extent of facilities and skilled services able to be drawn on over the course of a production. Studio complexes in locations with extensive and longstanding media sectors such as Sydney, London, Rome, Berlin often have the edge over studio complexes in locations with less developed surrounding media infrastructure;
- the reputation of a particular location as a site of film production, film culture and broader creative activity. For example, the *Lord of the Rings* trilogy has showcased the versatility of New Zealand locations, the skills of New Zealand craftworkers and post-production facilities, and the creativity of its above-the-line crew (directors, producers, writers, cinematographers) so that New Zealand is now firmly on the horizon of international producers as a production destination;
- the natural and built-environment in which a studio complex is located. As noted earlier Barrandov, for example, benefits from Prague’s capacity to double as a variety of European cities at different moments in history;
- proximity to major centres providing the necessary range and quality of accommodation and access to international flight and other transport connections. In the past it has been suggested that one of the reasons why more international production did not locate in Eastern Europe was the standard of hotel and transport infrastructure. These are now being addressed, and may in turn be factors in the growth of international productions in, for example, the Czech Republic and Romania. Conversely, the Gold Coast studio was helped in its first years by its accessibility and the proximity of relatively cheap, quality, seaside hotels and apartments which could accommodate crews flown in from other centres initially for short periods to work on individual productions;
- the film-friendliness of local and national authorities and the role of film commissions and agencies. Local authorities act as gatekeepers providing access to public land and facilities, and the charges levied on productions for the use of locations and the mobilisation of ancillary services – police, fire-brigade, rail – can act as an incentive or disincentive for production. National immigration regulations and procedures for importing film equipment can either ease or hinder the production process. Film commissions, agencies and local production service companies also play a part in guiding producers through local regulations and helping them access ancillary services, production incentives and tax breaks. The level of incentives and tax-breaks offered by national and sub-national authorities is, of course, a factor in many decisions about the location of production.

Institutional connections, including the studio’s relations with local and national (and in the case of the European Union supra-national) authorities and film commissions and agencies, might be identified as a point of differentiation among studio complexes.

One of the distinguishing features of the Babelsberg complex is the presence in the adjacent ‘media city’ of the offices of Filmboard Berlin-Brandenburg and Film Association Brandenburg, two agencies whose role is to encourage film production in the region, and the Konrad Wolf Film and Television Academy, which

moved to the media city in 2000. In 1998, Studio Babelsberg in partnership with the German regional investment bank Investitions Bank des Landes Brandenburg (ILB) established a film production finance and management company, Studio Babelsberg Independents (SBI), specifically to invest DM50m annually in production by small and medium-sized production companies in the Berlin-Brandenburg region.²¹

Studio Babelsberg has also benefited from the availability of funding from the European Union in developing and refurbishing the site. In March 2001, a studio spokesman estimated that European Union sources and national subsidies had provided half of the c.DM1 billion investment in the site to upgrade basic infrastructure including roads, sanitation and electricity as well as production infrastructure over the previous decade.²² The imminent accession of the Czech Republic to the European Union means that studio complexes in that country may have access to a range of European Union funding programs. Most studios, however, do not have this same range of institutional connections.

Another set of institutional connections is provided by the relationship some studio complexes have with local broadcasters. This may sometimes appear to be a marriage of convenience and sometimes part of an explicit strategy of centralising production in a locality to create a production epicentre. The latter is certainly the case for Cinecittà – literally translated as ‘cinema city’ – and Babelsberg, with its adjacent Media City (Medienstadt). At other times the relationship may be part of corporate logic and design, where broadcasting operations are subsidiaries of the studio operator’s parent company. So the program production needs of channels carried on the Australian pay TV network Foxtel can be partially met on the Fox Studios site.

THE BALANCE OF WORK

While the studio complexes which we are focusing on in this report are primarily oriented towards large-budget international feature production, the reality for most is a mix of feature films, TV series, telemovies, TV commercial (TVC) production and music video production. Some studio complexes primarily do high-budget feature film – Fox in Sydney, Fox Baja in Mexico, Pinewood in the UK, Barrandov – while others such as The Bridge, Vancouver Film Studios and Lion’s Gate in British Columbia do primarily telemovies and TV series production. Sitting in between are the bulk of complexes which are sites for a variety of production work.

The balance may change quite dramatically over time. The Gold Coast was known until recently for its television series and telemovie work, plus ongoing TVC production. But since the beginning of the production of *Scooby Doo*, Warner Roadshow studios has been more successful in attracting high-budget features. While this may offer the opportunity to enhance the reputation of the complex there may also be a cost when the mix changes. Hosting the *Scooby Doo* shoot required the displacement of the telemovie and TV series production work which had sustained the studio complex for a number of years.

Barrandov provides perhaps the most dramatic example of this changing balance of production. Up until the end of the Communist regime in the late 1980s it had been the epicentre of the local feature film production industry. While a number of large-budget international feature films were made there in the 1990s, most notably *Mission Impossible*, Barrandov was sustained through much of the decade by TVC production, which accounted for up to 40 per cent of its production work. It is only in the last couple of years that high-budget international features have become dominant.

As we will discuss further below, increasingly, studio complexes enable other forms of media work by virtue of the central position they occupy in new media precincts such as those established in Babelsberg and Fox Sydney and those proposed in Leavesden, Ealing and Melbourne.

²¹ ‘German Studio Launches Production Outfit’ (1998), *Screen Digest* October, p. 218.

²² Mark R. Johnson and Vanessa Liertz (2001), ‘German Studio Transforms Itself into a Co-producer’, *Asian Wall Street Journal*, 21 March, p. N5.

WHEN THEY WERE BUILT

The time a studio complex was built matters in terms of the kinds of infrastructure it maintains and, just as importantly, the expectations it sets up within the film community, policy makers, governments and the public.

Studio complexes created in the heyday of the ‘national film studio’ idea, roughly from the 1920s to the 1950s – Cinecittà, Babelsberg, Barrandov, Ardmore – were designed with varying degrees of success to be production epicentres of their respective countries. Typically they employed large numbers of filmworkers across a variety of functions and services and commanded significant public investment and attention. Their size and the symbolic and political investment in them determined in most cases the direction and shape of domestic production and the kinds of international production they attracted. The legacy of their having been ‘national film studios’ can be seen in the continuing sense of public ownership of them by the local filmmaking community, publics and governments. There is a corresponding interest in and expectation about the kinds of productions undertaken within them and the character of their refurbishment to meet changing production circumstances. As a consequence what happens to these studio complexes is much more a matter for local film industry and public debate than in other places. So too there is an ongoing expectation – not always realised – that these complexes continue to influence the shape and character of local production.

In the same period as ‘national film studios’ were being established in Europe, the UK witnessed the development of studio complexes which were not motivated by governmental intentions to rationalise and centralise production through a single dominant studio complex. Instead they were typically developed either by British cinema entrepreneurs – Rank and Korda, for example – who desired to become ‘majors’ in their own right, or by Hollywood majors. The latter saw them as a means to (1) get around British and British Empire quota regulations, (2) enhance Hollywood’s permanent production presence in one of their most important markets, and (3) access British stories, locations and personnel and the creative culture of London – long the epicentre of English-language cultural production, and after Los Angeles and New York the third most important location for Hollywood/international film production during the 20th century.²³

Consequently the British studio complexes – Elstree, Shepperton, Denham, Shepherd’s Bush, Pinewood – were founded with a more commercial mandate and were more internationally oriented than their continental counterparts. This international orientation was not just founded on an ongoing American connection but reflected the continuing importance to the British film industry of its substantial Empire then Commonwealth markets, particularly in the dominions of Australia, Canada, New Zealand and South Africa.

Like their ‘national’ and Hollywood counterparts, the British studio complexes have needed to adapt to the changing production circumstances of increasingly disaggregated production. Pinewood, for instance, was initially modelled on Hollywood studio practice and relied in Rank’s heyday in the 1940s and 1950s on a large number of its own productions going on at the same time. But, as international production dynamics changed, there was not the same kind of guarantee of continuity of production and decisions on production location became, increasingly made on a project-by-project basis. The studio complex needed to accommodate a production system where it functioned as a rental facility, providing sound stages and production services to the international production industry.

The recent merger of the Pinewood and Shepperton studios similarly represents an effort to maximise returns from servicing the needs of the international production industry by organising and synchronising the use of the production space of each complex to accommodate as much high-budget production as possible. Pinewood has also added two state-of-the-art digital television facilities in the last few years, thus broadening the range of work able to be conducted and serviced on the site and as part of the process of transforming the complex into a multifaceted media hub or ‘media city’.

There are parallels here with other large-scale studio complexes which have transformed themselves through the addition of digital post-production facilities and other new media capacities to become multifaceted media hubs and remain epicentres of production in their respective regions. The existing concentrations of audiovisual production activity which have built up over time in the vicinity of these

²³ It is arguable that Canadian locations, particularly Toronto and Vancouver, took this mantle in the 1990s.

complexes have facilitated this transformation. Since the early 1990s with the renovation of Babelsberg this 'media city' model has increasingly become the preferred strategy for renovating existing large-scale studio complexes. Both former national film studios and the various UK studio complexes have either been or are currently in the process of being renovated as media hubs. Such a renovation enables them both to retain their competitive advantage in the market for international production and to ensure they are well-placed to service the future needs of old and new, local and international, media production. By the same token the media city model is writ large in a number of new studio complex developments, particularly in centres which did not previously have internationally oriented studio complexes – Fox Sydney and the new Melbourne and Toronto studios are cases in point here.

In the period from the 1960s to the present day we can discern the emergence of another type of studio complex characterised by its primary orientation towards international production. These complexes are mostly not on the same scale as those developed in an earlier period such as Pinewood, Cinecittà and Babelsberg, and are initially characterised by having fewer sound stages than previously. This is because they are not intended to fill the same comprehensive function as the earlier studios. Rather, they are principally designed to service the particular – 'one off' – needs of the contemporary international industry, where decisions on production locations are made film by film and all complexes compete for individual projects. Studio complexes are also extremely costly developments: the larger they are the more expensive they are to equip and maintain, and the greater difficulty they have in ensuring the crucial element of continuity of production.

Over time the complex may grow, with sound stages added in response to the growing reputation of the studio complex and the resulting increase in the volume of work, which in turn attracts a greater range and depth of locally available ancillary services. With this expansion raising the profile of international production in a particular location, governments often pay increasing attention and may assist in the expansion of existing studio complexes, the development of new ones, and the provision of international production incentives. Vancouver is the paradigmatic case of this expansion of film studio complexes with accompanying governmental support.

A significant proportion of these new studio complexes is located outside core film and television production locations. The development of complexes in Malta in the 1960s, Vancouver and Wilmington (North Carolina) in the early 1980s, the Gold Coast in the late 1980s, Castel in Romania in 1992, Fox Baja in 1996, Isle of Man in 2002, and studio complexes proposed for Cornwall, Wales, Cairns and Perth are all of this type.

Studio complexes can sometimes become defined by particular productions, and develop a specialisation through catering for other productions with similar needs. In the case of Fox Baja, which was built around a watertank facility for *Titanic*, the resulting specialisation has been embodied in the physical plant. The success of international TV series and telemovies made in the Gold Coast studios during the 1990s gained the complex a reputation for this kind of work, which in turn attracted more of the same, as well as encouraging the development of related specialised skills in the region.

The fact that studio complexes have been built or are proposed in a larger range of locations than previously points to the new dynamics of international production outlined earlier. And the fact that a greater range of locations can now support a studio complex creates in turn a substantial filmmaking capacity in places where previously there was only limited filmmaking infrastructure.

Further underwriting this geographical expansion and the renovation of existing facilities is the increasing attention paid by governments to international production and the studio complex as central planks in the development of a region's 'creative economy'.

FUNCTIONAL PROFILE AND SPATIAL CONCENTRATION

Studio complexes are notable for the extent and type of production work they do and for the degree to which they enable concentration of this work in a single place. They have always clustered production and post-production services in one location but have done so in different ways. Currently, we can identify three different models of functional profile and spatial concentration of production activities and services:

- the 'production precinct', which services production but does not have extensive post-production facilities and services;

- the ‘cinema city’ complex, which is oriented towards film and television drama work and contains the range of production and post-production services necessary to provide full service;
- the ‘media city’, which includes all of the features of the cinema city but also includes a broader range of broadcasting production facilities and increasingly other new media services.

While the lines between these three types of complex are permeable, they represent three identifiably different logics of both studio complex development and of production and post-production clustering.

Within the media city we can further distinguish between:

- complexes primarily centred on servicing state-of-the-art film and television production for existing and emerging distribution networks; and
- complexes which have these characteristics but also foreground new media and may include non-media related ‘creative industries’ such as design, fashion and architectural services.

The production precinct

These studio complexes are predominantly ‘production’ focused in that they comprise sound stages, workshops, production offices and perhaps a backlot, but offer a limited range of production services and little or no post-production services or capacity. Typical examples are the Toronto Film Studios and Prague Studios. They can only become equivalent to a functional full-service facility when they are close to an existing range of production and post-production services. However, where such services are either not available or are not utilised, the clustering is limited to the facilities and infrastructures required for part of a production shoot.

The cinema city

In the cinema city the cluster is organised solely to provide production and post-production services to feature films, telemovies, and international TV series. Some of these complexes provide full service through their own range of services; while most rely on attracting and retaining a range of tenant companies to provide the ‘one stop shop’ primarily for drama production. Warner Roadshow Studios on the Gold Coast, both MediaPro and Castel in Romania, and up until quite recently Cinecittà, Pinewood, Babelsberg and Barrandov exemplify this model. The business model of cinema cities is focused on attracting and retaining as much high-budget feature, telemovie and international series production as possible though providing a range of facilities and services onsite.

The media city

In the media city the tenants are clustered more broadly around ‘media’ services – information and communication technology (ICT) companies with a predominant media production focus, film and broadcasting-related companies and, often, training facilities.

In this case the range and type of production – which may include but is not limited to drama production – require a broader range of services than in the cinema city model. Where a typical cinema city like the Gold Coast might have 11 tenants onsite, the prototypical media city, today’s Babelsberg, has over 130 media-related companies onsite. Many of these complexes also have a television broadcaster onsite and include facilities for the full spectrum of television production including news, infotainment, programs with live audiences, special events (including concerts) as well as drama.

Another feature which distinguishes the media city from the cinema city is the more extensive role of ICT companies. In order to attract the necessary range of companies to service an increasingly complex contemporary media environment, these studio complexes not only need to be fully digitally capable with a high-speed network backbone but also need a range of specialist information and communication technology companies with, at least in part, a media orientation.

The presence of so many companies offering a diverse range of services has a number of benefits for the studio complex owners. First, revenue from the lease of office space provides long-term, defined income. Second, the complex is able to service a broad range of productions both on and offsite at any one time.

Third, the existence of this extensive range of facilities and services is a drawcard attracting production business.

The business model of media cities is consequently more complex than that of cinema cities. Not only does it seek to attract and retain high-budget features, telemovies and series production through providing a range of facilities and services onsite, but the presence of so many tenant companies means the complex is recast as a form of commercial property/industrial park development.

In addition many media cities also include extensive public areas comprising cinemas, concert halls, restaurants, function and conference centres, retail areas, theme parks, studio tours and, in the case of Fox in Sydney, a farmer's market. So while their primary function is still to service film and television production, media cities characteristically have a number of other public functions. The provision of exhibition, transmission and complementary leisure and entertainment facilities serves to further diversify the revenue base, augment the studio complex's public profile and reposition it at the centre of a broader media, leisure and entertainment and retail cluster. The incorporation of these features has been a means to either develop sites which had not been previously used for film production, such as Fox in Sydney, or to transform and renovate existing studio complexes such as Cinecittà, Pinewood, Babelsberg and Barrandov.

The Ealing Studio redevelopment, with its focus on new media and creative industries, illustrates an emerging variation of the media city model. This redevelopment shares many of the characteristics of the media city in that it is oriented to feature film production and is projected to service a variety of firms and activities. But it also foregrounds its new media provenance and includes, in a more central way, non-media related 'creative industries' such as design, fashion, and architectural services as well as IT companies which have no or only a minor media focus.

As noted above, studio complexes are increasingly being recognised as key players in the wider creative economy and an anchor element in creative industry/new media cluster development. The recognition that studio complexes are at the centre of regional transaction networks and drive much creative and related activity in a particular region is informing the contemporary enthusiasm of many public authorities for the construction or refurbishment of studio complexes. Their aim is to use the studio complex to create in Allen Scott's words 'dense networks of specialised but complementary producers clustered together in industrial districts' and to replicate the transactions-intensive clusters of specialised firms characteristic of Los Angeles film, television, recording and multimedia industries.²⁴ It is now the policy of a number of agencies around the world – from local government authorities to regional and national development agencies – to develop and enhance their clusters of creative industries through studio complex development.

Analysis of such clusters has become an important part of assessing the economic viability of particular areas and the potential of particular regions, and has spawned a range of studies. Scott's study of the Los Angeles and Paris film industries and Krätke's study of Potsdam-Babelsberg film industry²⁵ turn on identifying the locational characteristics, quality and depth of networks, the extent of interfirm collaboration and synergies with related industries as key elements of the success or failure of particular cultural product/creative industries clusters. While detailed analysis of the networks connecting production facilities and related companies might provide useful insights, such analysis is beyond the scope of this study.

CONCLUSION

In this chapter we have sought to capture the diversity and scope of the contemporary studio complex phenomenon. By using a number of variables we have been able to group together and differentiate between studio complexes on the basis of their size and location, ownership, their age, the balance of the production work they undertake, the quality of infrastructure and institutional connections, and their functional profile and spatial concentration.

All of these variables determine, to a greater or lesser extent, how these complexes participate in the international production ecology and how they are related to local production ecologies. They are also

²⁴ Allen J. Scott (2000), *The Cultural Economy of Cities: Essays on the Geography of Image-Producing Industries*, London: Sage, p. 205.

²⁵ Stefan Krätke (2002), 'Network Analysis of Production Clusters: The Potsdam/Babelsberg Film Industry as an Example', *European Planning Studies*, vol. 10 no. 1, pp. 27–54.

factors determining the circumstances under which new complexes have been developed and existing ones renovated.

We finished the chapter by identifying three models of studio development – the production precinct, the cinema city and the media city – which recognise the importance of how studio complexes cluster activities and services.

In the next chapter we will discuss particular examples of these models to illuminate the problems and issues inherent in each. In so doing we will more explicitly situate Australia's new and existing studio developments within these models.

Chapter 3

Case studies in development and renovation

Our purpose in this chapter is to illuminate the problems and issues around both the establishment of new studio complexes and the renovation of existing complexes through a series of case studies of particular facilities which exemplify the three models of functional profile and spatial concentration identified in the previous chapter – production precinct, cinema city and media city.

In elaborating on these models we are concerned with making distinctions among studio complexes on the basis of what they do and what they enable. Each of our case studies will highlight, among other things, the balance of local and international production work undertaken and the dynamics of production this balance gives rise to in each location. In doing so we will also be situating Australian developments in their international context.

The **new studio developments** we will be discussing include complexes established in areas where:

- there was previously no film presence (as on the Gold Coast);
- there had previously been a location production industry but no studio complex or substantial film infrastructure (as in Vancouver);
- there was existing infrastructure and a substantial production industry but previously no large-scale studio complex (as in Sydney, Melbourne, Toronto);
- there were one or more large-scale studio complexes already in existence (as in Prague and London).

Typically a new complex establishes its profile through servicing large-scale, high-budget, usually international, production in partnership with local providers. Facilities and services are thus established locally which in many cases would not have otherwise been established. These may become of benefit to the local production industry and may lead, over time, to the studio complex functioning as an epicentre of production in its region. The Vancouver complexes, for instance, rapidly became regional production epicentres.

This ‘epicentre effect’ is also seen where the demand for further production created by an existing studio complex leads to the establishment of additional complexes. Each new complex then needs to establish its relationship with both the local and international production industries.

The **renovated complexes** we will discuss include examples of:

- facilities which have been, and through renovation continue to be, major epicentres of production, including former national film studios facing very different production circumstances (Barrandov in the Czech Republic, Babelsberg in Germany, Cinecittà in Italy), and the major UK studio complexes (Shepperton, Pinewood);
- secondary, smaller studio complexes (Ealing and Leavesden in the UK), acting as minor epicentres of production.

Most of these renovated complexes have a longstanding history of ‘representing’ the production industry in their respective territories. Because of the volume of production work they directly and indirectly support, the health of the studios is a significant factor in the health of the production industry, and any changes to them can have major consequences for the industry as a whole in a particular territory.

Put simply, production exists in these countries to a great extent because the studio complexes exist. Their contemporary renovation is therefore about maintaining their centrality. Generally, whether they are major or minor epicentres, their renovation serves to:

- maintain their capacity to produce large-scale, high-budget usually international, films;
- prevent them from falling into disrepair; and

- enable them to remain competitive as cutting-edge studio complexes with good communication links and technologically advanced digital production and post-production environments.

All our examples of renovated studio complexes also have a history of combining local and international production. Pinewood, Barrandov, Babelsberg and Cinecittà were the epicentre of their respective local production industries in the 1960s and hosted a variety of international productions. Only in the case of Barrandov has renovation worked against local production participation in the studio complex.

As noted in Chapter 2 the development and renovation of studio complexes is driven by either film industry considerations or a combination of film industry and non-film industry considerations.

While film industry considerations are often the primary driver in renovating existing studio complexes (Cinecittà, Shepperton, Pinewood and Ealing), such considerations can also drive the development of a new studio complex (Prague Studios).

By the same token while a combination of film industry and non-film industry considerations often motivates the construction of new studio developments (as in the Gold Coast, Vancouver, Melbourne and Sydney studios) particularly when sited in areas without a studio complex, there are also cases of existing studio complexes being renovated out of a combination of film industry and non-film industry considerations (Babelsberg and Leavesden).

Earlier chapters have noted some of these non-film industry considerations, such as allowing a region or area to diversify its economic base to take advantage of the flow-on effects of film production to a regional economy and to establish cutting edge technological infrastructure capable of generating the regional 'creative industries'.

FROM PRODUCTION PRECINCT TO CINEMA CITY: THE GREENFIELDS STUDIOS OF VANCOUVER AND THE GOLD COAST

A number of studio complexes have been developed or proposed in regions where there is little in the way of existing production infrastructure. Typically these complexes represent strategies by provincial (state), local and in some cases national governments to build their film production infrastructures almost from scratch. They are either peripheral to the main centres of production in the country or represent an attempt to establish a film production base in a country without one (for example, a proposal, now dormant, to build a complex in Fiji).

Because of the emphasis on regional development, provincial governments are likely to be firmly focused on jobs and multiplier effects and less focused on the national cultural patrimony. New studios sited in places where there is little in the way of industry base have to adopt particular strategies to attract 'core' tenants and be organised to 'fly in' people on a needs basis. There is the assumption in these developments that innovation and expansion will come not only through businesses located in the same place transacting with each other, but also as a result of the environment of creativity generated by the proximity of a variety of creative businesses.

The purposes of these studio complexes tend therefore to be several. They are tied into a regional development strategy. They are looked to as a means to generate foreign investment, create employment in new economy industries, and provide or encourage the development of particular specialisations. And they are conceived as the hub of a cluster of related industries and companies.

The transformation of Vancouver

The several Vancouver studio complexes are significant to our study. Since the first studio complex, The Bridge Studios, was opened in 1987, Vancouver has become an important centre for international production and a major audiovisual production centre in North America.

Vancouver is not without precedent. For example, Dino de Laurentiis had earlier set up a studio complex in the early 1980s in Wilmington, North Carolina, to take advantage of the locations, lower labour costs and compliant workforce (North Carolina is a 'right to work' state). Other studio complexes had also been

established to service international production and build on existing location production outside North America in the 1980s, such as Atlas Corporation Studios, Ouarzazate, Morocco.

But Vancouver's extraordinary success has made it a model for thinking about the development of film infrastructure and capacity in places peripheral to traditional centres of film and television activity.

What is notable about Vancouver is how it has transformed itself over 20 years from a centre for location production without any substantial residual infrastructure to one of the foremost film production and services centres for the international production industry in North America.

This transformation has occurred in stages. The initial catalyst was the development by the provincial government – at the instigation of film unions and the local industry association – of The Bridge Studios as a production precinct designed primarily for the production shoot. Over time this complex expanded and a range of other facilities and services were also developed. The existence of The Bridge Studios and increasing demand for controlled production environments led to the establishment of additional studio complexes in Vancouver such that it now has several 'cinema cities', each with multiple sound stages and ancillary infrastructure (Vancouver now hosts over 50 sound stages).

Vancouver has been able to capitalise on its initial development of a studio complex in ways that other places have not. In this it was aided by a range of interlocking factors. First there was the exchange rate, which made Canada a cheaper location. Second there was its functional proximity in time zone and transport to the 'design centre' for the international production industry in Los Angeles. Third, there was the entrepreneurial, collaborative activity of its film unions and companies in pursuing international production and developing master agreements between the unions and producers' associations which emphasise peaceful labour relations.²⁶ Fourth, and not least, there was the role of the British Columbia government in providing incentives and investing in infrastructure throughout the period.

Vancouver was able to establish itself as a major international production centre because the various local players worked together to provide innovative and flexible solutions to their dependence on international production. They understood the 'ever present need for collaborative, organised entrepreneurialism' and 'international competitiveness',²⁷ to maintain and enhance Vancouver's profile and reputation as a centre for international production. Without a substantial local production industry to fall back on, their solution to their dependency as a district was to become more – and not less – dependent on international production. For David Murphy, Vancouver's dependency as a filmmaking location on 'global financial, distribution and exhibition mediums' nurtured and reinforced significant levels of 'intra-community interdependency',²⁸ which have enabled it to withstand competition for international production from other – traditional and emerging – film production locations.

Parallels with the Gold Coast

Although on a much smaller scale and without the level of surrounding infrastructure that has been built up in British Columbia, the establishment and subsequent development of the Gold Coast studio complex shares many parallels with Vancouver. Like the initial Vancouver complex, the Gold Coast complex was developed in a region peripheral to the country's major production centres at the instigation of a conservative provincial government.

In both cases, the involvement of government was essential. In Vancouver, the provincial government financed The Bridge Studios redevelopment, and continues to control the complex through a crown-owned corporation. In the case of the Gold Coast the state government secured Dino De Laurentiis's commitment to build a studio complex in Queensland by providing a low-interest loan of \$7.5 million and offering a 30-year lease of the 50-hectare site at Coomera to facilitate construction. Loans to finance initial construction and subsequent expansion topped up the final amount of state government assistance to \$12.5 million.²⁹

²⁶ For an extended discussion of this point see David G. Murphy (1997), 'The Entrepreneurial Role of Organized Labour in the British Columbia Motion Picture Industry', *Relations Industrielles/Industrial Relations*, vol. 52, no. 3, pp. 531–553.

²⁷ Murphy (1997), 'The Entrepreneurial Role of Organized Labour', p. 549.

²⁸ Murphy (1997), 'The Entrepreneurial Role of Organized Labour', p. 549.

²⁹ Sue Pavasaris (1988), 'Lights, Camera, Ahern! Queensland Film Gets a New Start', *Filmnews*, vol. 18, no. 9, p. 3; Warner Roadshow Movie World Studios (1992), *The Economic Effect of Warner Roadshow Movie World Studios on the Film and Television Industry in Queensland*, May, p. 7.

In both Queensland and British Columbia, the initial interest of government was spurred by a conviction that international film production would be a medium for regional industrial development and diversification, and a valuable promotional appendage to the resource and tourism industries.

Importantly, this policy thinking did not align with the traditional film policy frameworks of either government, but rather came out of industry development and job creation thinking. In these circumstances the governmental interest in developing studio complexes was somewhat disconnected, at least initially, from the aspirations of Vancouver's and nearby Brisbane's small domestic industry to participate in their respective domestic film and television industries.

In both cases, however, their involvement in servicing international production gave Queensland and West Coast Canadian-based filmmakers the opportunity to 'establish a commercial cinema' out of the development of a studio complex. For Mike Gasher this was 'an opportunity that had been denied BC by the concentration of the Canadian film industry in Ontario and Quebec'.³⁰ Similarly, in Queensland's case this opportunity could be seen to have been pre-empted by the concentration of film industry activity in Sydney and Melbourne (NSW and Victoria). International production allowed both centres to overcome their status as 'remote outposts' of their national film industries. In both places Hollywood was not seen as an impediment to the development of a local film industry but as a means to develop a local film production capacity through the development of a film services industry.

The Gold Coast complex has gained a reputation locally and internationally for its work on television series such as *Mission: Impossible* and *Time Trax*, telemovies, and more recently high-budget international feature films – *Scooby Doo*, *Peter Pan*, *Ghost Ship*. However, it has also hosted a considerable amount of local production, some of which – including controversial co-productions such as *Beastmaster* and *Pacific Drive* – has stretched our thinking about what 'local' production might mean. While studio management and service companies have been generally willing to negotiate favourable terms and conditions for local productions on limited budgets, in general the costs of using the complex's sound stages are too high for the low budgets characterising domestic production.

Starting from a low base

Both Vancouver and the Gold Coast complexes have a common 'frontier' quality to them, as filmmaking infrastructure was being created from such a low base. This lent an improvised and provisional quality to developments in each location and a 'no frills' approach to the studio complex and its environs. Neither had, for example, the landscaping or the 'putting down roots' quality of the Fox Studios complex in Sydney.

In their early years, both complexes relied on fly-in, fly-out film-workers – in Vancouver's case from Los Angeles to fill the heads of department positions, as complete below-the-line crews were provided by the local film unions, and in the case of the Gold Coast from Sydney and Melbourne to supplement the small Brisbane pool of film-workers. Over time in both centres, productions' labour needs have been able to be met by locals as international producers' levels of trust in their abilities increased, and as the local pool grew through training and migration.

Both complexes became known for their television work – principally international television series and telemovies – and less for high-budget feature film. Indeed in both locations skills grew up locally to service these particular kinds of production (although in the case of the Gold Coast there was some disruption to this local film milieu with the succession of high-budget feature films that the studio housed from 2000).

The Gold Coast complex has transformed over time from a production precinct to a cinema city. The complex was established with four sound stages and a small number of onsite tenants. Initially it had limited post-production capacity and was only able to service production shoots. Additional facilities have been added at intervals – new sound stages were built in 1990, 1996 and 2002, and the exterior watertank was constructed in 1996 – and more companies have located onsite or close to the complex thus enabling the provision of the full range of production and post-production services.

³⁰ Mike Gasher (2002), *Hollywood North: The Feature Film Industry in British Columbia*, Vancouver: UBC Press, p. 46.

Production shoot orientation

However, both Vancouver and the Gold Coast remain more oriented to the production shoot and less to post-production than their counterparts at Pinewood-Shepperton, Babelsberg and Cinecittà. While initially a consequence of the limited skills and services available and the need to build a film infrastructure of locally based service providers from scratch, a range of factors has contributed to continuing this production shoot orientation.

Not least is the fact that both locations are film services centres for the international film production industry and support very limited domestic production activity which would call on an extensive post-production sector. This means that film services companies located in Vancouver and the Gold Coast have not been able to mix and match domestic and international production in the same way, leveraging one off against the other to expand and update facilities and services, as have companies in Toronto, Montreal, Rome, Berlin and London.

For Vancouver there is the additional reason that it is close to Los Angeles and operates in the same time zone. This has meant that the post-production side of telemovie and international series production can be more efficiently managed from Los Angeles with its substantial post-production and design industry and there is little incentive to create this kind of infrastructure in Vancouver. Even new studio complexes in the city, such as the US\$20 million Brentwood complex, are touted as providing more state-of-the-art sound stages and production support services (like lighting, grip, and prop rentals) to handle the sustained growth of the film industry there and less seen as comprehensive 'media parks' servicing international and local production needs.

Commercial orientation

Both Vancouver and the Gold Coast depend more on international production than do Toronto and Montreal's film industry in Canada, or Sydney and Melbourne in Australia. Unsurprisingly, given their international orientation and limited domestic production, both regions are better known for playing somewhere else than playing themselves. British Columbia promotional literature explicitly invites the filmmaker to 'bend me, change me'. As Mike Gasher observes, the city of Vancouver has 'not sufficient signifying power – sufficient star power, in Hollywood parlance – to play itself'³¹ – and this comment is even more applicable to the Gold Coast.

Both centres have also been characterised in commentary as subordinating cultural values to commercial values in their work and profile. The rationale for state financial support and the centres' promotion overseas has consistently focused on the economic and employment benefits that would accrue to British Columbia/Queensland, and on the glamour of Hollywood, rather than on their contribution to local film culture. Without 'talk of art or national identity to confuse things',³² film could more easily coopt the images and rhetorics of the nascent tourist industry, and be framed in terms of state economic development, rather than cultural development. Chasing the multi-million dollar investments that large-budget international productions would bring made sense to a province/state reared on large investments and deals with foreign companies in the pastoral and mining industries. Both centres placed considerable emphasis on establishing liaison networks and resourcing their respective film commissions with a service rather than production funding orientation. Government has been important here not only in enabling the studio complexes to be established in the first place but also in enabling them to continue to function as integral components of the international production ecology.

The Gold Coast studio complex is different from its Vancouver counterparts in that, unlike them, it has adopted the 'Florida model' of a film studio located in an area defined by a theme park. This combination was obviously important in attracting the involvement of a Hollywood major, Warners, who were interested in establishing an Australian version of their movie theme park business. And the involvement of the Hollywood major was important in giving the complex immediate credibility.

In addition, the involvement in the development of the initial De Laurentiis-led bid of an experienced industry figure like Terry Jackman ensured that the complex had significant political, local and international industry connections (Jackman had been general manager of two of Australia's largest exhibition chains –

³¹ Gasher (2002), *Hollywood North*, p. 118.

³² Sandra Hall (1979), 'Queensland Takes the Plunge', *The Bulletin*, 18 December, p. 65.

Hoyts, and Birch, Carroll and Coyle – had overseen Hoyts’ involvement in high-profile Australian productions, and had sold *Crocodile Dundee* in international markets).

In both Vancouver and the Gold Coast, the commercial orientation of the studio complexes was an important factor in convincing governments, investors, the film community and the public of their value. This commercial orientation emphasises the importance of continuity of production given the low operating margins of these facilities – hence the value of long-term series television production (for example, *Stargate SG-1* in Vancouver, and *Beastmaster* on the Gold Coast) or long-term relationships with major television or film production companies (for example MGM for Vancouver, Coote/Hayes for the Gold Coast).

BETWEEN CINEMA CITY AND MEDIA CITY: THE INNER-URBAN STUDIO COMPLEXES OF SYDNEY, TORONTO AND MELBOURNE

In some ways the Sydney, Melbourne and Toronto developments are significant departures from previous studio complex developments. Unlike their Vancouver and Gold Coast counterparts, these complexes are not ‘the only game in town’; in each case substantial infrastructure and film services already existed, as would be expected of cities which were already substantial epicentres of local and international production.

And unlike most studio complexes built in the ‘national film studio’ era described in the previous chapter, these developments are on inner-urban or peripheral inner-urban sites, thanks to the availability of sizeable tracts of public land – Sydney showgrounds, Melbourne docklands, Toronto port area. Without this land, and without substantial assistance from governments, these centrepieces of urban regeneration strategies would not have been built.

But in all three cases, the levels of taxpayer support available to the developments in the form of tax breaks and land subsidies have raised questions about the propriety of the arrangements, and accusations that government involvement unfairly tips the competitive balance in favour of particular companies and service providers.

So the immediate challenge facing these studio complexes is not to establish infrastructure and encourage film services development and investment, but to enter into a productive relationship with the existing industry for which the new complex is both a potential competitor and collaborator. These developments have consequently been controversial both within industry circles and outside.

Some of this controversy, particularly in Sydney, seemed to turn on the relation between the local and the international production industry, with government investment appearing to favour international production. However, the underlying concerns in each city have been about how these developments would impact on the organisation and delivery of film services and infrastructure – their effects on existing infrastructure, clusters of film activity and relationships among firms, and whether certain firms would enjoy advantages by being located on a subsidised studio complex lot.

Common to each development is a sense of strategic priority, widely shared outside film industry circles, which won significant public support for the complex. This is the notion that the host city – Sydney, Melbourne, Toronto – needed its own studio complex: to develop local production capacity to its next stage, to modernise infrastructure so as to retain a technological edge, to generate regional employment in the film industry and related service industries, and to build export-oriented capacity in an industry perceived to be ‘clean and green’. There is also the equally compelling notion that these cities and the states and provinces within which they are situated should have a big, signature development such as a studio complex to represent and promote their maturity and global ambitions. Melbourne, for instance, wants a big studio development in part because it sees itself as ‘losing’ some of its ‘media city’ position to arch rival Sydney and to the Gold Coast.

This combination of circumstances helps explain the extensive involvement by governments in studio complex development and their preparedness to make available often historically significant and commercially valuable sites.

The path to Melbourne’s Docklands complex

The then-Premier of Victoria, Jeff Kennett, reportedly attempted to convince Rupert Murdoch to build a studio complex in Melbourne rather than Sydney when the plans for the Fox Studios development were

announced in 1994.³³ At that time, a number of major developments were planned or in process in Melbourne: the renovation of the National Gallery of Victoria; the redevelopment of the docklands area including construction of a sports stadium; the operation of the Crown casino; and the mooted Federation Square development.

In 1997, a consortium initially including Paramount Studios, Viacom Inc., Crawfords Australia, WIN Television, Thorney Holdings (the investment arm of Visy Industries), and the Macquarie Bank proposed construction of a theme park, studio complex, a themed hotel and multiplex cinema in the 89-acre precinct of the Melbourne docklands designated as a business park. The studio would be managed by Crawfords and include two television sound stages, one stage for film and television, and one feature film stage.³⁴ The consortium had constant difficulties securing the necessary finance, and these difficulties were exacerbated by sustained public criticism of the proposed development by the rival Village Roadshow organisation. Plans for a public float were dropped in early 2000 after lack of institutional investor interest.

The Victorian state government stepped in, offering to provide around \$40 million in assistance to keep the project alive. In part as a result of the failure of the original entertainment city/studio city proposal, the government appointed an industry task force to review the film and television production industry and recommend a framework for future development. The Review found that the absence of 'a studio complex with an assured future and suited to both offshore and local production is a major gap in Victoria's infrastructure, putting Victoria at a competitive disadvantage'.³⁵

Convinced that the development of a large-scale state-of-the-art studio complex was vital to the health of film and television production in Victoria, the state government announced a call for tenders for a pared down studio complex development, minus the theme park, in June 2001. In January 2002, the government announced Central City Studios as the preferred tenderer for the \$111 million project, which included a \$31.5 million low-interest state government loan and \$8.5 million for the cost of the land, and an agreement by the successful tenderers that at least 25 per cent of its capacity would be reserved for local producers who would also be able to apply for a rental subsidy to use the sound stages. Although work to remediate the land began shortly after the announcement, legal and financial difficulties delayed the final green lighting of the project until October 2002. The complex is expected to be ready for filming to commence in early 2004.

Two new studio complexes for Toronto?

Like Melbourne, the saga of Toronto's studio complex development is predicated on fear of a decline in production capacity in the absence of such a facility, and on the desire to be recognised as a leading international production centre.

It's become conventional wisdom that what the Ontario capital needs to clinch its place as a major filmmaking centre is a mammoth (at least 80,000 square feet), sophisticated sound stage capable of accommodating big-budget, state-of-the-art, special-effects-driven projects on the scale of *Titanic* and *Star Wars*.³⁶

For Toronto Mayor Mel Lastman, studio complex development 'will be the anchor Toronto's film industry has been waiting for all these years'.³⁷ For Michael Grade, chair of Pinewood-Shepperton Studios, the development of a studio complex is necessary for Toronto's growth. 'You've got a fantastic movie industry in this country ... what you don't have is the facilities to match that'. Grade saw a studio complex as enabling Toronto to 'move up the league table' of audiovisual production centres.³⁸

³³ According to some reports, Murdoch used the overtures from Melbourne in negotiations with the NSW Government, and reportedly threatened to move to Victoria if certain conditions were not met. See 'Fox Eyes Victorian Sites for Film Studio' (1995), *Gold Coast Bulletin*, 20 March, p. 11; Mark Furness (1995), 'Kennett Says Sydney Is Favourite for Fox Film', *Australian Financial Review*, 21 March, p. 8.

³⁴ Adriana Mauric (1998), 'Docklands Studio to Fill Victorian Gap', *Encore*, v. 16 no. 2, 11 March p. 1.

³⁵ Victorian Film and Television Industry Task Force (2000), *The Film and Television Production Industry in Victoria*, Report, September, p. 42.

³⁶ James Adams (2002), 'Giant Studios Face Big Challenges', *The Globe and Mail*, 16 October, p. R5.

³⁷ Tess Kalinowski (2002), 'Film Studio Brings Star Support', *Toronto Star*, 7 February, p. B04.

³⁸ David Nickle (2002), 'Toronto Scores Mega Film Studio', *Inside Toronto*, 1 February. See <http://www.insidetoronto.ca/to/tbt/v-printtoronto/story/112655p-194359c.html>, accessed 28/2/02.

Anxiety about being left behind in the high-stakes competition for international production, not only by other international centres but also by national competitors in Montreal and Vancouver, led to a situation where there were two competing bids to develop large-scale state-of-the-art studio complexes. Both were in close proximity to each other in the Port Lands district, and both were consistent with the broad objectives of the joint City of Toronto–Province of Ontario–Canadian government project to regenerate 46 kilometres of waterfront land.

A consortium including the UK's Pinewood-Shepperton Studios was announced in February 2002 as the successful tenderer for a studio complex development on land managed by the Toronto Economic Development Corporation (TEDCO), a business corporation wholly owned by the City of Toronto. In April 2002, the crown corporation Ontario Power Generation announced that a studio complex proposal had won the tender for the redevelopment of the site of a decommissioned power station.

The transformation of the 11-hectare power station site into the Great Lakes Studios began with a groundbreaking ceremony in October 2002, and the complex is expected to be available for production in early 2004. It is a joint venture between Studios of America and Paul Bronfman's Comweb Group, a network of production services and facilities companies. The latter had been an unsuccessful bidder for the TEDCO site. Bronfman was involved in the development of what is now Lion's Gate Studios in Vancouver, and Comweb operates the Ciné Cité studio complex in Montreal. Unlike its Sydney or Melbourne counterparts, the Great Lakes Studios development is privately financed, although it is built on land owned by a crown corporation and has the backing of the Ontario provincial government. The complex benefits from infrastructure generated by the site's prior use. A railway spur connects it with main rail lines (and can also act as a set for train scenes), and the power station building is being turned into an enormous effects stage 45 metres high, and 275 metres long. The waterfront location also offers a ready-made marine backlot, with access to international shipping lanes and a natural horizon line, critical for open-sea settings.

In April 2003, the preferred tenderers for the TEDCO site withdrew, citing an inability to attract commercial tenants and financial backing for the C\$150 million project. This was a major setback for the City of Toronto and for its mayor, as both had strongly backed the development. The construction of a studio complex appeared an ideal solution to a number of pressing concerns including the perception that a massive facility was necessary for future growth in the city's audiovisual production sector, and the need to regenerate derelict and contaminated waterfront land. A studio complex also promised to act as a catalyst and a hub for the 'convergence clusters' which are at the heart of the Toronto Revitalization Corporation's plan to transform the city into the 'knowledge portal' of North America.³⁹ But while there was general consensus that a massive studio complex would be a valuable addition, few outside the competing consortia believed that the city could support two such developments. TEDCO still has plans for a studio complex on the site, but it seems unlikely this will happen in the near future.

Benefits beyond infrastructure

While both Melbourne and Toronto already had a number of smaller studio complexes and facilities with sound stages, and while each is an epicentre of production, neither had the kind of large state-of-the-art complex that the new developments represent.

But these complexes are not only important as expansions of infrastructure. Significantly, as we noted in Chapter 2, all are inner-urban developments on public land which could conceivably have been used for a variety of other purposes. The decision of the relevant authorities to approve their use for filmmaking is informed by expectations of the direct commercial benefits such complexes may provide to each city – for example, the successful tenderers for the Melbourne Docklands development are contractually bound to bring in an additional \$100 million in production work in 2004/05, and for each financial year thereafter, and the Victorian Department of Innovation, Industry and Regional Development expects the facility to have a direct economic impact of up to \$160 million in the first five years of operation, and an estimated ongoing direct economic impact of \$39 million each year thereafter.⁴⁰

³⁹ Gillian Cosgrove (2002), 'Toronto to Finally Get Real Studio: City Falling Behind in High-Tech Dept., but Not for Much Longer', *National Post*, 2 February, p. T01.

⁴⁰ Auditor-General Victoria (2003), *Report on Public Sector Agencies*, February, p. 183.

Even more important are the externalities expected to flow from the studio complex developments. These externalities include the regeneration of unsightly or hazardous areas close to the urban centre, and the symbolic value to each city's image that the complexes and the production work they are anticipated to attract will bring.

Fox Studios as 'signature development'

The Fox Studios complex is quite obviously a 'signature development', both for the city of Sydney, and the state of NSW, as well as for the complex's ultimate parent company, News Corporation. At the time of its negotiation and announcement, the agreement to renovate the Sydney Showgrounds as a film studio complex was also a 'signature development' for the Federal Government. The announcement of the development by Rupert Murdoch to the annual general meeting of News Corporation shareholders in October 1994 came on the same day as the launch by Prime Minister Paul Keating of the federal Labor government's long-awaited cultural policy statement 'Creative Nation'.

The necessary but convoluted involvement of governments in studio complex development has been a constant theme of this report. The Fox Studios Sydney complex illustrates quite starkly the extent this involvement can reach. The transformation of the showgrounds site into a studio complex required substantial assistance from both federal and state governments. The Federal Government provided \$14 million to meet Keating's 1994 pledge, while the NSW Government bore most of the estimated \$32 million cost of asbestos removal from the buildings, and of necessary upgrades to water, sewerage and electrical services on site.

The development was finally approved in May 1996, subject to environmental and planning conditions being met, including the protection and restoration of 20 heritage-listed buildings, upgrading of footpaths and street lighting, improvements to traffic flow, insulation of sound stages, the absence of 'white knuckle rides' in the public areas, and the retention of the central open-air Showground ring.

Fox Studios Australia was granted a 40-year site lease from 1999, with a 10-year option and annual rent of \$2 million, to develop six sound stages, production and post-production support areas, a public studio tour, and an entertainment complex comprising cafes, restaurants, shops and cinemas. A concession on payroll tax was capped at just over \$6 million over seven years, with land tax concessions capped at \$1.25 million over the same period. A stamp duty exemption of \$460,000 was also granted to the developers.⁴¹

Government involvement in the Fox development had a number of motivations, which may have parallels in the Melbourne and Toronto cases. First, the complex represented a tangible commitment to media production in Sydney, taking its film production and services sector to a new level and filling a gap in the city's media infrastructure. Second, the development was an important mechanism to secure Sydney's reputation not only as a global city, but as a global media city, and a serious player in the international production game. Third, the construction of a studio complex reinforced the position of Sydney within the domestic production ecology in response to the success of other centres – particularly the Gold Coast – in attracting production work. Fourth, the development of the complex offered an opportunity to redevelop a problem site: the Showgrounds buildings and grounds required significant refurbishment to remove asbestos, in some cases to avert building collapse, and to counter the pollution of nearby ponds and waterways.

For Fox, the investment made sense 'for reasons of developing an offshore production base in an offshore centre that was deemed to be competitive, to be rich in talent, and to represent a new opportunity for the company ... given that the company has a long, historic association with Australia'.⁴² The move was clearly designed to give a more public Australian face to Fox's parent, an Australian-based but globally dispersed media conglomerate. So the complex was a signature development for News Corporation as much as it was for Sydney or the NSW Government.

Recent internationally successful Australian films and Sydney's pre-existing film infrastructure were also key factors for News Corporation. The fact that Sydney, unlike Queensland or other greenfields locations

⁴¹ Tracey Prisk (1995), 'Carr Reveals Final Fox Plans', *Encore*, v. 13, no. 19 Nov/Dec, p. 7; Ben English (1996), 'Fox Showground Studio Approved', *Daily Telegraph* (Sydney), 7 May, p. 15; 'Fox Showground Plan to Go Ahead' (1996), *Canberra Times*, 7 May, p. 5; Trudi McIntosh (1996), 'Fox to Deliver World-Class Multimedia Environment', *The Australian*, 7 May, p. 28.

⁴² Kim Williams, Chief Executive, Fox Studios Australia, interview with Ben Goldsmith 30 August 2001.

already had 'all the auxiliary services required to support a studio'⁴³ made the prospect of investment in facilities more promising because they indicated that Sydney possessed the key attributes necessary for a successful international production centre – 'capacity to perform, and attitudinal culture'.⁴⁴ According to Williams, Fox was attracted by the qualities of Australian crews (a significant proportion of which were already located in Sydney), their rigorous standards, flexibility, and the lack of the strict demarcation of work common in the US, which reduces the size of crew needed. Murray Pope of Animal Logic also highlighted the adaptability of Australian crews compared to their American counterparts, observing that 'every US film set that you may step on has a feeling of abundance no matter what the scale of production. Australian film projects, while extremely professional, seem to have an ability to readily adapt to situations and ... an easier stance on creative and production compromises'.⁴⁵

It is important to reiterate, however, that the Sydney development has not met with universal approval. Grassroots community opposition to the redevelopment of the historic Showground site was building as details of the project emerged. An action to halt the development was brought against the state government by the Save the Showground for Sydney Action Group in the Land and Environment Court, citing breaches of planning laws, a lack of public consultation, and concerns over the use to be made of public land and the heritage value of the site buildings. The project was argued to contravene legislation introduced by Independent State MP Clover Moore which had been designed to ensure that the Showgrounds site would revert to public ownership when the Royal Agricultural Society relocated to Homebush, and not be used, as had been previously mooted, to build medium-density housing with funds going towards the construction of facilities for the 2000 Olympics. In September 1996 the action group's objections were dismissed by the Court, and a subsequent appeal was dismissed by the NSW Court of Appeal in June 1997.

Fox's mix of domestic and international production

When the development was first announced in 1994, the Fox Entertainment Group's Executive Vice President of Feature Production, Jon Landau, acknowledged that the recent success enjoyed by Australian films had been one of the key factors in the decision to invest in infrastructure in Australia. But tension between local production interests and Fox has been a constant in the life of the complex.

Against rising community and some industry criticism, much was made at the outset about Fox Studios' commitment to the Australian film and television production industries and to Australian film culture. An alliance of unions, industry associations and the Communications Law Centre proposed to the NSW Government that half of the productions at Fox be Australian, but according to Fox Studios Australia's first chief executive, Kim Williams, 'We told the government that if it was accepted, we wouldn't proceed'.⁴⁶ Fox won that battle, but in part to counter its negative image in some parts of the local industry, the complex helped establish the scriptwriting workshop Tropnest by redeveloping and refurbishing a cottage onsite. Unfortunately, Tropnest's failure two years afterwards did little to improve existing impressions, despite the fact that, according to Williams, Fox was unaware of Tropnest's plight until two days before the announcement of its demise.⁴⁷

Local film industry concern that the international productions using the studio complex would 'suck up' crew and resources and increase the costs of filming in Sydney by creating a higher price structure for the use of particular locations have been countered by the claim that the complex would help the Australian film industry to grow and to 'lock into export opportunities' in Asia.

In addition, according to Kim Williams, the level of technological upgrade which the facility represented would allow 'our domestic industry ... to consistently compete in a film and television world which is now characterised by capital-intensive, new-age technology ... The significance of the digital environment cannot be over-emphasised in the marketing of Australian filmmaking facilities'.⁴⁸ This view is supported by key

⁴³ John Landau, Fox's Executive Vice President of Feature Production, quoted in 'Movie Mecca' (1994), *Telegraph-Mirror* (Sydney), 19 October, p. 4.

⁴⁴ Kim Williams, Chief Executive, Fox Studios Australia, interview with Ben Goldsmith, 30 August 2001.

⁴⁵ Murray Pope, Animal Logic, interview with Ben Goldsmith, 29 August 2001.

⁴⁶ Neil Shoebridge (1997), 'Fox Creates a Stir at Venue for a Show', *Business Review Weekly*, 13 October, p. 42.

⁴⁷ Kim Williams, Chief Executive, Fox Studios Australia, interview with Ben Goldsmith, 30 August 2001.

⁴⁸ Kim Williams (1996), 'Showground Film Studios to Set Stage for Next Scene', *Australian Financial Review*, 10 April, p. 16.

service providers. As Dale Duguid puts it, high-budget international production is the industry's R & D. Murray Pope argues that 'the local infrastructure scene has benefited enormously from foreign production coming in here, and the range of equipment you can get here, from lighting to cameras to editing to visual effects and sound, has to a large extent been funded by large-scale, US-funded film projects with substantial infrastructure budgets and an expectation that production infrastructure and crews should be as good as anywhere in the world'.⁴⁹

But it is also generally acknowledged that, unlike Toronto, Sydney (and by extension the Australian production industry) has a problem in terms of crew depth; while the expertise may be here, the simultaneous production of a number of international productions would likely test its extent. With planning approval recently being granted to a second major studio complex in Sydney, and construction beginning on the Melbourne complex, crew depth will be tested.

Fox compared to the Gold Coast

Sydney shares the crew depth vulnerability with the Gold Coast, but in many other ways Fox Studios is quite a different development from Warner Roadshow Studios. With the recent addition of stages 7 and 8, the Gold Coast complex now has more sound stage area than Fox, and while all of the Gold Coast sound stages were purpose-built, Fox Studios' sound stages are a mix of renovated and purpose-built. The largest stage at Fox, stage 1, the Raymond Longford Stage, is the refurbished, heritage-listed former Government Pavilion. The greatest challenge facing the developers, aside from the need to remove asbestos, was to reinforce the roof and adequately soundproof the walls without destroying the essence of the building.

Fox Studios hosts many more tenant facilities and services companies than the Gold Coast, as Fox does not share the Gold Coast's need for exclusivity agreements as a means to attract core tenants.

Unlike the Warner Roadshow complex, Fox Studios has a large public area comprising retail and entertainment outlets. Although Fox was prevented under the terms of its lease from developing a theme park, its substitute development – the backlot tour – was not a success, and was recently closed. The Bent Street commercial area remains an important aspect of Fox Studios' public profile and of its efforts to maintain public access to the former Showgrounds site. This area, comprising shops, cinemas, restaurants, bars, a farmers' market and a live performance venue, coupled with onsite production of programming for the subscription television network Foxtel (of which News Corporation owns 25 per cent) and a number of News Corporation's other media interests, takes Fox Studios beyond the 'cinema city' model of the Gold Coast. The availability of this range of public attractions onsite gives an 'entertainment city' character to the underlying 'media city' form of Fox.

THE INTERNATIONAL PRODUCTION CITY: BARRANDOV AND PRAGUE STUDIOS

The city of Prague, and most particularly the Barrandov studio complex, have been known since the 1930s as a location for international production, but the volume of both domestic and international feature activity declined in the decade after the collapse of the Communist regime. For a decade from 1989, television commercials comprised a substantial proportion of production work at the complex. From 1999 international feature production has been Barrandov's mainstay.

At one level the contemporary concentration of international production activity in Prague is surprising. The Czech Republic is a small country, and until recently there was no film commission infrastructure supporting, facilitating and encouraging international production. Nor was there a system of governmental incentives and tax breaks encouraging location production. Further, the country's domestic film production collapsed in the transition to a market economy and a differently organised production base.

Yet Prague has not only been able to maintain a significant studio complex, Barrandov, but also to generate the establishment of new one, Prague Studios, a refurbished former aircraft factory built to American production specifications a few years ago – all without the benefit of a healthy domestic film production sector, governmental agency assistance or incentives.

⁴⁹ Murray Pope, *Animal Logic*, interview with Ben Goldsmith, 29 August 2001.

Why Prague?

Prague's current position as a major production venue is a consequence of several circumstances. First the city's built environment has advantages as a prize location for film production and television commercials alike. As producer, Anne Pivcevic, puts it:

There's a huge range of unspoilt architectural styles and landscape to be found here, the like of which I've seen nowhere else in Europe. One huge plus point is that it escaped bombing in the second world war – you can walk into any Prague street, any village or café, and find what appears to be a ready-made set.⁵⁰

The city's architecture makes it a favourite for period productions, and it has seen recent recreations of Europe in medieval times (*A Knight's Tale*), the 18th century (*The Scarlet Pimpernel*, *Plunkett & Maclean*), 19th century (*From Hell*, *Shanghai Knights*, *Oliver Twist*) and 20th century Europe (*Anne Frank*). In an attempt to cash in on this feature the Prague City Council increased location permits and rental fees in 2002 by around 500 per cent, although these increases were reversed late in 2002 following pressure from local and international producers based in the city.

Second, Prague is advantaged by the existence of both skilled crew and substantial studio complexes. Skilled crew can supply production services to international production with labour costs around 40 per cent cheaper than in the UK or USA. Indeed there was a ready pool of skilled, under-employed film workers to draw on, as a large proportion of Barrandov's several thousand strong workforce was laid off in the early 1990s with the industry moving to private contractors on a film-by-film basis.

This shift in employment led to a lack of unionisation among film workers and an absence of strict work rules, making for a compliant labour force. To this day wages continue to remain low in comparison to other international production centres. However, there is growing concern in the Czech Republic that the country's imminent accession to the European Union will result in rising prices and wage inflation, thereby wiping out what to date has been the Czech film industry's primary competitive advantage.

Prague film workers' considerable skills in set construction and art direction are also significant factors in attracting production, particularly when coupled with the facilities of the city's studio complexes. This combination of skills and facilities means that more of the production can be done in Prague, with sets built in sound stages and backlots to complement the city locations. The combination is also proving useful in attracting science fiction productions, particularly to the new Prague Studios (both *Dune* and *Children of Dune* were filmed at the Prague Studios).

A third factor which helps explain Prague's seemingly disproportionate share of current international production is the particular importance of foreign, particularly American, capital and companies, as investors. Unlike other continental 'media cities', Prague's infrastructure is substantially maintained by money from outside Europe. A number of non-Czech, usually but not always American, production companies have been established in the city over the 1990s as English-language international production developed. One of the most active and successful small firms located at Barrandov is Stillking Productions Ltd, now Stillking Films, a company founded by Briton Matthew Stillman in 1992. The company has grown from a tiny advertising and music video production house to a major Czech media player. It made the film *xXx* starring Samuel L. Jackson in Prague, and is regularly reported to be a potential buyer of the Barrandov complex. In April 2002, Barrandov hosted a delegation of independent American producers in an effort to win more mid-range international production.

Finally, both Barrandov and Prague have a longstanding history of engagement with the international production industry, stretching back to Barrandov's initial construction in the 1930s. Barrandov was originally designed for international production, although domestic activity became increasingly important through the 1930s. Among the films made at the studio in its first decade were Julien Duvivier's French-language version of *Le Golem/Golem* (1936) and multi-language versions of Victor Tourjansky's *Volga en Flammes/Volha v Plamenech/Volga in Flames* (1933) and Nicolas Farkas's *Port Arthur* (1936).⁵¹

Shortly after Czechoslovakia was occupied by the Nazis in 1938, the complex was expropriated, overhauled, and used as an alternative centre for German film production. After the Communist takeover in 1948 the

⁵⁰ Kate Connolly (2002), 'Bridge for Hire – \$7,000 a Morning', *The Guardian*, 12/4/02, p. 8.

⁵¹ Peter Hames (1995), 'Barrandov Film Studios' in Ginette Vincendeau (ed.), *Encyclopedia of European Cinema*, London: BFI, pp. 32–33.

Czechoslovak film industry was nationalised by presidential decree, and the complex became a state-owned and state-run facility. Barrandov and the Koliba Film Studios in Bratislava (now in Slovakia) became the centres of national production.

From the 1960s the complex was periodically hired to international filmmakers as a means to earn valuable foreign currency. In 1964, West German producers made the first full-length non-Czechoslovak feature there. German production constituted a substantial part of the complex's foreign film production in succeeding decades, and remains important to this day as Germany's importance in film and television finance and consumption grows. Hollywood producers also made use of the facilities before the fall of the Communist regime, with *Yentl* and *Amadeus* filmed there in the early 1980s. In 1987, Canada and Czechoslovakia signed a co-production treaty which led to a variety of projects being made at Barrandov in the 1990s and assisted in developing links between Canadian and Czech companies.

Contemporary history

The contemporary turn to international production begins with the 1989 transition from socialism. Under the new government, Barrandov's state subsidy of 170 million crowns (then c.US\$6.3 million)⁵² was slashed, with 1700 employees made redundant.⁵³ While the then regional Czech government was later convinced to inject 120 million crowns (c.US\$4 million) into local filmmaking in 1991,⁵⁴ the studio complex and the domestic production sector was hit hard by the transition and subsequently by the decision to privatise the Barrandov complex.

In June 1992, the complex was sold to Cinepont (later renamed AB Barrandov), a company comprising 25 film managers and workers headed by Barrandov's executive officer Vaclav Marhoul, for 500 million crowns (then c.US\$20 million), although the final payment of 250 million crowns was not made until 2000.⁵⁵ In the first years of the country's political transition, the studio's management team sought to exploit cost advantages over other facilities to service international production and attract co-productions to keep the complex going. In 1992 the complex initiated the first Eastern European location market at the Karlovy Vary film festival to promote international production in the region. In 1996, the steel company Moravia Steel became the majority shareholder in AB Barrandov.

Under Marhoul's management, Barrandov pursued a dual strategy of attracting international film and television production and becoming a major domestic communications corporation. It expanded its media holdings to include a radio station, a movie magazine and an advertising company, and planned to develop a theme park. The studio was also involved in the production of 25 of the 60 Czech language films made between 1992 and 1996, with Marhoul claiming that the studio had suffered substantial losses on its local production.⁵⁶ In 1997 Marhoul left Barrandov after a loss of 170 million crowns (c.US\$5 million) in 1996. With Marhoul's departure, the studio returned to a focus on co-production and facilities rental for largely international clients.

Although the reputation of the complex and of Prague as a location was damaged by the price inflation and red tape experienced by the production of *Mission: Impossible* in 1995, since 1999 a significant number of major international productions have been lured to the city. The boom in production after 1999 has encouraged the establishment of a large number of production and production services firms, with around 3000 listed in the city's 2001 film directory.⁵⁷ Smaller firms tend to work with larger firms on a film-by-film basis, in sharp contrast to the pre-1989 system where film units 'usually led by a well established director, comprised several directors, as well as screenwriters, cameramen, set and costume designers, and sometimes even actors, all salaried employees who only received bonuses upon the completion and release of a new film'.⁵⁸

⁵² Craig Unger (1991), 'Prague's Velvet Hangover after their Revolution', *Los Angeles Times*, 12 May, p. 20.

⁵³ Audrey Choi (1994), 'Filmmakers Adjusting Focus for the Future', *Wall Street Journal Europe*, 31 January, p. 38.

⁵⁴ 'Czech Films to Receive State Subsidies Again' (1991), *Reuters News*, 3 April.

⁵⁵ 'Czech Barrandov Studios Sold' (1992), *Hollywood Reporter*, 26 June, p. 4. Lenka Studnickova (2000), 'Barrandov Deal Off Due to a Lack of Capital', *Prague Business Journal*, 27 November.

⁵⁶ 'Prague Film Studio Incurs Losses on Czech-Language Films' (1996), *Pravo*, 15 January, pp. 1, 4.

⁵⁷ 'Czech Republic: Take One: Prague' (2001), *Newsweek International*, 19 March.

⁵⁸ Dina Iordanova (1999), 'East Europe's Cinema Industries Since 1989', *Media Development*, no. 3, p. 14.

Current facilities

Barrandov has its limitations, particularly its lack of extensive, modern, onsite post-production facilities. A US\$10 million digital visual effects facility was mooted in 1996, but did not eventuate, largely as a result of management upheavals and the reluctance of the complex's owners to make the necessary investments. The absence of ancillary facilities such as five-star hotels in and around Prague has also been cited as a hindrance to future growth. The film processing laboratories in the complex recently upgraded their equipment, increasing capacity from 1000 to 2800 metres of film per hour, at a cost of 25 million crowns. The laboratories are reported to generate around 35 per cent of the studio's revenues.⁵⁹ In November 2001, it was announced that an additional 4000 square metres of sound stages would be built.

Despite the need for investment in facilities, international production at Barrandov, as in Prague more widely, is booming, with the studio complex competing with a growing number of facilities for a share of footloose international production.

Like its counterpart in Vancouver, Prague added another studio complex in the 1990s. This time it was not a bus depot like Vancouver's The Bridge, but an aircraft factory, like Leavesden in the UK, which was transformed into Prague Studios by the Los Angeles-based production company Milk and Honey Studios. The site on the outskirts of Prague contains three sound stages which are claimed to be the largest in Central Europe.

Barrandov's current owners, Moravia Steel, have been trying to sell the complex since 1997, and all likely buyers mention the need to invest in studio infrastructure. In May 2002, Moravia Steel's 80 per cent share in Barrandov's holding company was put out to public tender.

Barrandov's mix of domestic and international production

Barrandov's contemporary face is that of an international production centre with only a limited role in the domestic industry. This is a far cry from its previous status as an epicentre of local production. As a state-controlled entity Barrandov produced between 30 and 40 feature films annually, and the vast majority were Czechoslovak productions. Pre-1989 funding was awarded through semi-autonomous film units closely connected with the Barrandov complex. After 1989 the local film industry entered a period of sustained crisis, with the number of domestic features dropping dramatically as state subsidies were slashed.

Plans to privatise the studios in the early 1990s were bitterly resisted by many Czech filmmakers, who formed the Association for the Foundation of Czech Cinematography to lobby against the plans. The group warned that a fully commercial studio would be devastating for local production.⁶⁰ In response, the Ministry of Culture kept a 'golden share' in the complex, a move designed to guarantee that the complex was used for filmmaking, and that Czech filmmakers continued to have access to the facilities. But in 2000 the golden share was declared legally invalid by a commercial court, removing the state's influence over the operation and future of the complex. In its place, it has been proposed that future owners sign a contract with the state that would ensure continuity of production and guarantee some amount of local production.

Financing for Czech film production is now competitively awarded to individual projects by the State Fund of the Czech Republic for the Support and Development of Czech Cinematography. This can be supplemented by grants and loans awarded by the European Union's production support schemes and by individual European co-production partners, with France playing the most prominent role. The Czech Republic is currently barred from membership of the EU's MEDIA Plus program because Czech audiovisual legislation does not conform to EU standards.⁶¹

Since the privatisation of the studios in 1992 various attempts have been made to connect productively with the local film industry. In 1992, a foundation and a script development fund were established by the complex's owners to contribute to the funding of Czech films.

In addition, the State Fund for the Support and Development of Czech Cinematography was established to distribute profits from sales of films in Barrandov's film library to the production and distribution of local

⁵⁹ 'Barrandov Laboratories Have World-Parameters Equipment' (2001), *CTK Business News*, 16 November. 'Barrandov Film Studio Expects CZK 100 mln Drop in Revenues in 2001' (2001), *Interfax Czech Republic and Slovakia Weekly Business*, 24 November.

⁶⁰ Ian Katz (1992), 'The Tread of a Velvet Tightrope', *The Guardian* (Manchester), 4 June, p. 24.

⁶¹ Ministry of Culture of the Czech Republic (2001), *Report on the State of Czech Cinematography in 2000*, p. 6.

films. However, this remains a sore point between the studio and the government. The Culture Minister lodged a suit against AB Barrandov in 1998 to recover 117 million crowns in copyright royalties owed to the fund.⁶² The fund had been seriously depleted in recent years as a result of falling revenue from cinema attendance, its other source of funds.

Czech television companies have increasingly become important financiers of Czech film production in the last few years.⁶³ In 1994, Eastern Europe's first nationwide commercial television channel, TV Nova, began a production relationship with Barrandov by commissioning a children's program, a game show and a soap opera. In 1999, TV Nova relocated to the Barrandov complex following a dispute with the broadcaster's primary service provider CNTS. The dispute is currently before the courts.

In the context of a transitional society the partial collapse of the local production industry made Barrandov very interested in presenting itself almost exclusively as a facility offering skilled crews and specialised skills to the international film production industry. For Barrandov, international production became a means of keeping the facility going. In a sense this was the only strategy available to them. In a post-Communist society the government was neither able nor committed to sustain funding for a state-run facility, which became perceived to be a liability. The international production industry allowed the complex to be kept going – and upgraded where possible. International production also maintained some level of film production activity in the country, even if this was not necessarily local production.

MEDIA CITY BY CIRCUMSTANCE: CINECITTÀ

All meetings, relationships, friendships, experiences, trips, begin and end for me in the studios at Cinecittà. All that exists outside the gates of Cinecittà is an enormous storehouse to visit, to plunder, to transport avidly and tirelessly inside Cinecittà. Maybe it is a privilege, maybe a servitude – but it is my way of being. *Federico Fellini*⁶⁴

For many years the only substantial continental rival to the UK's Pinewood and Shepperton as a European location for high-budget international film production was Cinecittà in Rome. During the 1950s and 1960s it acquired a reputation with epics such as *Quo Vadis?*, *Ben Hur* and *Cleopatra*, Spaghetti Westerns such as *For a Few Dollars More* and dramas such as *Roman Holiday*. It was 'Hollywood on the Tiber', but at the same time it was also the epicentre of Italian feature film production: as much as half of the total Italian film output in some decades was produced out of Cinecittà since its opening in 1937. Fellini made nearly all his films there – including *La Dolce Vita*, *8 1/2*, *Casanova* and *Fred and Ginger*.

Cinecittà's decline began in the late 1960s and continued through the 1970s, when debts spiralled, 'sets were dismantled and dummy forums and temples [were] carted away'.⁶⁵ A partial recovery occurred in the 1980s with the sale of land owned by Cinecittà for housing and retail development, and the production of high-budget international films such as *Once Upon a Time in America*, *The Last Emperor* and *The Name of the Rose*.⁶⁶

Then, from the late 1980s and into the early 1990s Cinecittà faced an especially lean period, before returning strongly towards the end of the decade as a significant destination for high-budget international feature production and as a major centre for local television and feature production. In recent years *The English Patient* (1996), *Daylight* (1996), *Titus* (1999), *The Talented Mr. Ripley* (1999), *U-571* (2000) and *Gangs of New York* have been shot at Cinecittà. At the same time the complex has become a centre for Italian television, with television companies occupying some of its biggest stages with 'live shows and quiz games ... beamed to millions of households' and 'teenagers' queuing up 'at its gates in the hope of making a career in television'.⁶⁷

⁶² 'Culture Minister Sues AB Barrandov' (1998), *CTK Business News*, 23 April. 'Czech Studio Landed with Copyright Bill' (1998), *Screen Digest*, 1 June, p. 126.

⁶³ Ministry of Culture of the Czech Republic (2001), *Report on the State of Czech Cinematography in 2000*, p. 15.

⁶⁴ Quoted in Daniel J. Wakin (1993), 'Even in Death, Fellini Assumes Epic Proportions: All-Night Wake Held at Rome Studio', *New Orleans Times-Picayune*, 2 November, p. A11.

⁶⁵ UNESCO Courier (1995), 'Cinecittà', *Unesco Courier*, no. 7 July, p. 68.

⁶⁶ UNESCO Courier (1995), 'Cinecittà', *Unesco Courier*, no. 7 July, p. 68.

⁶⁷ UNESCO Courier (1995), 'Cinecittà', *Unesco Courier*, no. 7 July, p. 68.

Contemporary reversioning

The contemporary reversioning of Cinecittà which began in 1992 is especially interesting. At one stage or another nearly every possible permutation available to a studio complex has been explored, sometimes in advance of its counterparts elsewhere and sometimes well behind, to make Cinecittà a viable 'media city' studio complex.

First there were the various attempts to make it 'more than a studio'. A retail shopping complex, Cinecittà 2, and housing developments resulted from the sale of land in 1982 (Cleopatra's Roman forum made way for the shopping mall). A communications centre to support Cinecittà's 'cinematographic vocation' featuring cinemas, teaching facilities and a museum was mooted in 1994 and partially implemented.⁶⁸ Agreements were contemplated between Cinecittà and a major Italian company to use the Cinecittà brand name 'to market quality products sold in kiosks and book shops'.⁶⁹ Various attempts at a movie theme park have been made, leading to the development of the studio tour in 1994 so that, in *Variety's* inimitable prose, 'gawkers will be able to get a first-hand look at the principal site of Italy's golden age of filmmaking'.⁷⁰ More lately a dedicated theme park is on the books for opening in 2004 and Cinecittà is launching its own satellite broadcasting channel. In this pattern of redevelopment Cinecittà bears comparison with the large Hollywood studio complexes it was initially created to rival in its design, luxury and appointments.

Second there were the various strategies to redevelop Cinecittà as a 'working film and TV studio'.⁷¹ Here the strategy was to *plan* its involvement with television, rather deal with it on the *ad hoc* basis which had hitherto characterised its dealings with the medium. Cinecittà was striving to connect with and shape television production and financing agendas to the studio's benefit. From 1994, agreements and initiatives were sought with public and private audiovisual companies, particularly the major private broadcaster (then Fininvest) and public broadcaster (RAI). In RAI's case this was to co-produce 'eight Italian films and invest in 17 other projects'.⁷² These initiatives recognised the reality of Cinecittà's already significant dependence on both state and commercial television.⁷³

In 1995 its relaunch program highlighted a 'planned digital village' as part of a move away from simply being a 'space for rent' facility to becoming 'an integrated audiovisual services company'.⁷⁴ Its early 1990s focus on 'special projects' saw Cinecittà envisaging a role for itself in the development of interactive 'multimedia products', forging relationships with telcos and exploring 'TV/cinema synergies'.⁷⁵ In short Cinecittà was positioning itself as a place for innovation in the design and incubation of television and new media rather than simply being a rental space.

The third element of Cinecittà's contemporary transformation were the various strategies to make it 'more than Italian'. Cinecittà would compete with other studio complexes elsewhere in a number of inter-related ways, on the basis of:

- its location near a variety of locations in and around Rome,
- the prices it charges (a favourable exchange rate),
- its traditional skills in set decoration, costume design and set construction,
- its upgraded post-production facilities and
- its capacity to offer 'full service'.

⁶⁸ 'Ente Cinema's Three-Year Plan Proposes Creation of Communications Centre in Rome' (1994), *Il Sole 24 Ore*, 7 December, p. 9.

⁶⁹ 'Board of Ente Cinema Approves Three-Year Relaunch Plan', (1994) *Il Sole 24 Ore*, 6 July, p. 16.

⁷⁰ 'Italian Film Studio Going into Tour Business' (1994), *Variety*, 5 July, B-7.

⁷¹ Giovanna Grassi (1994), 'Italy to Privatise Cinecittà', *Hollywood Reporter*, 6 September, p. I-1.

⁷² Mark Dezzani (1995), 'RAI gets more domesticated', *Broadcast*, 17 February.

⁷³ Victor L Simpson (1993), 'Liz's Queenly Bed Snapped Up for \$4,500: Huge Italian Film Studio, Cinecittà, Auctions Off Thousands of Props', *The Globe and Mail*, 2 June, p. C3.

⁷⁴ 'Cinecittà Prepares for Relaunch with New Agreements', (1995) *Il Sole 24 Ore*, 4 July, p. 9.

⁷⁵ For references to 'multimedia products' see 'Board of Ente Cinema Approves Three-Year Relaunch Plan' (1994) *Il Sole 24 Ore*, 6 July, p. 16; and for references to telecommunications companies and TV/cinema synergies see 'Ente Cinema Reports Losses in 1993, Draws up Relaunch Plan' (1994), *Corriere della Sera*, 6 March, p. 19.

To assist its competitiveness it would also build up its liaison network and launch a marketing campaign to improve its profile with international producers and generate business. The emphasis on core skills in set decoration and construction entailed renovating permanent sets on the backlot and creating new ones; another backlot space was also made possible by buying 'a ranch and a villa' which could be used as locations for both local and international films'.⁷⁶ Whereas Cinecittà representatives would once charge producers to pull down their sets, they were now offering incentives to help film and TV producers 'build sophisticated physical sets at a fraction of the normal cost'.⁷⁷ Besides helping the studio participate in emerging digital formats, the post-production facilities were also designed to make Cinecittà more competitive vis-à-vis Pinewood, Shepperton and Babelsberg by retaining more of the production within the complex.

Becoming a 'full service studio' with its own post-production lab, special effects studio and set design department, among other services, was a critical component in this redevelopment. 'It works like a hotel', says Carole-André Smith, the International Marketing Director, 'thus any producer or director can rent stages, sound editing rooms, sets, editing rooms, or can hire our carpenters, technicians, set designers or make-up personnel according to their needs'. The recent launch of a multimillion dollar publicity campaign, coupled with the establishment of an Italian Film Commission out of the Italian Trade Commission in Los Angeles, means Cinecittà can now draw on the kind of promotional office for the Italian audiovisual industry that has long been in place for other studio complexes.

There were also a variety of strategies designed to encourage production companies to locate in Rome and foster relationships with European partners. In this both Cinecittà and the Italian film industry were seeking to re-establish the earlier situation where Hollywood majors based themselves in Rome and bankrolled Italian-language production for European and American audiences. Miramax recently established an office there. Links were also established with other studio complexes to share work and infrastructure. In 1994 Babelsberg and Cinecittà signed a cooperation agreement covering the sharing of costumes, sets and possible co-financing of productions.⁷⁸ Cinecittà was also used for high-budget features in conjunction with the watertank facilities in Malta (*U571*).

A final feature of Cinecittà's reconversion was the tortuous public-private partnership which enabled the refurbishment and partial privatisation of the complex. This privatisation and relaunching was seen as 'critically important in helping restore Italian cinema'.⁷⁹ In 1993, Cinecittà was revived thanks to a policy of development and reorganisation of the Italian film industry introduced by the Treasury Department. It was transformed into a joint-stock company, and in 1998 became Cinecittà Holding SpA. Cinecittà Studios SpA had already been privatised in 1997. From 1999, the Department for Arts and Cultural Activity controlled Cinecittà Holding, which in turn is the largest shareholder in Cinecittà Studios, with 17.5 per cent of the shares. The Istituto Luce SpA, a government-owned structure that operates in the production, distribution and exhibition sectors and is the main national film archive, participates in Cinecittà Studios with 7.5 per cent shares. The Istituto Luce is part of Cinecittà Holding, so the state, through the Department for Arts and Cultural Activity, has a significant controlling interest in Cinecittà Studios (25 per cent). Cinecittà Holding intervenes in the areas of promotion of Italian cinema, through the organisation of international film festivals in collaboration with other international film institutions, film restoration and publishing. It thus appears that the interests of Cinecittà Holding are oriented toward the promotion of the domestic industry.

However, the most important innovation has come from the restructuring of Cinecittà Studios. Other than Cinecittà Holding, the shareholders are (1) Aurelio De Laurentiis, through the production company Filmauro Srl, with 15 per cent of shares; (2) Vittorio Merloni, head of the third European company in the production of appliances, with 15 per cent of shares; (3) Diego Della Valle, a leader in leather production and design, with 15 per cent of shares; (4) Vittorio Cecchi Gori, the largest Italian film distributor with interests also in film production, with 11.25 per cent of shares; (5) Robert Haggiag, a film producer and distributor, with 7.5 per cent of shares; and (6) Efibanca, a bank, with 7.5 per cent of shares.

⁷⁶ Barbie Nadeau (2002), 'Back to *La Dolce Vita*': Pinocchio Is Poised to Help Return Rome To Filmmakers' Maps – and That's No Lie', *Newsweek International*, 16 December, p. 59.

⁷⁷ Michael Goldman (2001), 'Set Incentives', *Millimeter*, vol. 29, no. 11, 1 November.

⁷⁸ 'Europe: Cooperation between Studios', (1994) *Media Monitor*, 18 March, p. 4.

⁷⁹ Giovanna Grassi (1994), 'Italy to Privatise Cinecittà', *Hollywood Reporter*, 6 September, p. 1-1.

Lessons from Cinecittà's decline

As interesting as the factors in the contemporary reversioning of Cinecittà to become once again a major international production centre are the reasons for its decline. By the early 1990s it had gone from a pre-eminent international and local production centre to something of a 'relic'— marginal to both the international and domestic production industries. Several explanations have been advanced for this decline, each of which provides a salutary lesson for studio complexes seeking to maintain their position as international and local production epicentres.

First was a range of interlocking elements which discouraged international production. The high-budget feature production or 'superproduction' that had characterised Cinecittà's international output in the late 1950s and 1960s fell into disfavour as television encroached further into cinema-going and cinema profits fell globally and in core western European and Asian markets. Increased costs when coupled with downsizing (including downsizing of filmmaking ambition) priced the complex and workers out of the market. By the late 1960s American producers were finding Cinecittà much less attractive: it had become too costly to film there with labour rates approximating those in the US. Like their US counterparts Italian filmmakers also turned away from using studio complexes like Cinecittà towards location production as a means of cutting costs.

Changes in the rules governing the use of foreigners in films made in Italy in the early 1970s also had a significant impact upon production activity. Dino De Laurentiis claims he left Italy in 1970 because 'a law came in saying you must use mostly Italian people in making films' – before this law he claimed 'that it had been 50:50, spread any way, so that in *War and Peace* I could use stars like Audrey Hepburn and Henry Fonda and an American director King Vidor alongside an Italian cameraman, designer and so forth'.⁸⁰

The security situation in Italy discouraged offshore film activity and investment alike – particularly from the mid-1970s, which saw a number of high-profile terrorist actions, and particularly in Rome as the seat of government and largest city.

Then there was Italy's increasingly complex tax bureaucracy, which contributed to making Cinecittà a less film-friendly environment than its UK competitors, Pinewood and Shepperton – which already had the advantage of operating in the English language.⁸¹ Cecchi Gori, Italy's largest film distributor, claimed in 1996 that 'the Americans have stayed away because we need their money so badly that we give them an unfair deal' citing disincentives such as VAT and 'tax surprises'. Apparently, non-transparent tax laws could create surprises, uncertainties and delays for producers. As Cinecittà's administrative director Degli Esposti recalled in 1996, 'I had an American producer who wanted to make a film at Cinecittà but who was still waiting for the return of VAT on his last production eight years ago. I went to the government and got them to hand it over. It is absurd that Hollywood companies must keep an office open for years after making their film just to reclaim taxes'.⁸²

At the same time, compared to its competitors, Cinecittà was barely marketing itself. As late as 1997 Deborah Ball was reporting that Cinecittà had 'done little to sell itself to foreign clients'; it had not 'bothered to launch a concerted public relations campaign to attract international producers or even hire English-speaking switchboard operators'.⁸³

But perhaps just as important to the decline of the studio was the erosion of its domestic base. International production at Cinecittà had been made up not only of production generated elsewhere but also of production generated by Italian companies and creative producers. The retirement of Carlo Ponti and the departure of Dino de Laurentiis and Alberto Grimaldi to work out of the US in the 1970s robbed the complex of its impresarios,⁸⁴ and the loss of charismatic producers such as these dealt it a heavy blow.

A further blow came from the retirement and eventual death of top-flight local creative personnel who had been committed to using and therefore promoting the studios and who were capable of commanding the

⁸⁰ 'Epic Fade-Out in Rome', (1996) *Financial Times*, 12 October, p. 1.

⁸¹ Deborah Ball (1997), 'Film: Privatisation May Spur Lethargic Cinecittà – Storied Studio Refocuses on International Filmmakers', *Wall Street Journal Europe*, 9 December, p. 4.

⁸² Carol Degli Esposti quoted in 'Epic Fade-Out in Rome' (1996), *Financial Times*, 12 October, p. 1.

⁸³ Deborah Ball (1997), 'Film: Privatisation May Spur Lethargic Cinecittà – Storied Studio Refocuses on International Filmmakers', *Wall Street Journal Europe*, 9 December, p. 4.

⁸⁴ John Phillips (1994), 'Italy Sells off Dream Factory on the Tiber – Cinecittà Film Studios', *The Times*, 27 August.

attention of local and international investors. The 1950s and 1960s generation of directors – Fellini, Visconti, de Sica, Antonioni – had created Cinecittà's post-war identity and buzz but by the late 1970s they were entering the twilight of their careers. Fellini died in 1993. Without active creative producers and directors at the height of their powers, Cinecittà progressively became a rental facility rather than a centre of innovation in filmmaking.

At the same time, the circumstances of Italian cinema were changing. Dramatically declining cinema box office both domestically after 1976 and in its core European markets (France and Germany) was reducing the monies available for Italian-based feature production, which meant that a new generation of filmmakers would not have access to the capital or infrastructures of the earlier generation. Explosive growth of television followed in the wake of the advent of commercial television stations and later networks, after a 1976 ruling that the public broadcaster RAI's monopoly was unconstitutional. The needs of domestic television rather than cinema began to drive patterns of investment in Italian audiovisual production, and Italian filmmakers became oriented towards television rather than cinema.⁸⁵ Indeed the Italian broadcasters – public and private – became over the 1980s and 1990s the major investors in Italian feature film production released in cinemas.

This situation left Cinecittà increasingly isolated. Its orientation had been towards high-budget international productions and local feature productions with high budgets and international partners. Neither characterised the new situation.

As a result, Cinecittà lost some of its central role in defining audiovisual production in Italy and was increasingly bypassed. With budgets for features and TV drama production typically lower, and lower expectations in terms of image and sound standards, the Cinecittà sound stages were too expensive for many productions. Designed to accommodate many films at once, its extensive facilities were soon under-utilised as producers shot on location or used smaller, cheaper and less well-equipped studios. Additionally television created pressure for decentralisation which eroded Cinecittà and Rome's central position. When RAI formalised its arrangements for drama production in 1995 Cinecittà was to be the venue for co-producing its feature film slate and investing in features, while Milan was to specialise in TV movies, Turin sitcoms, Naples soap operas. This confirmed a decentralising trend which was already substantially developed.⁸⁶

While Cinecittà was never as central to the shape and character of Italian television as it had been in the cinema, domestic television work became an increasingly important component of the studio's operations. In the process Cinecittà became, almost by default rather than plan, a 'media city' in which television and advertising production would contribute around 40 per cent of its annual revenue by the mid-1990s.⁸⁷ Cinecittà gradually became a place where Italian soap operas, variety TV, talk shows, current affairs and reality TV shows were being made, with this programming keeping 'much needed cash coming into the coffers'.⁸⁸

The problem with much of this work is that it was often cheaply produced and had little use for Cinecittà's specific, high-budget, film-related expertise in sound, set decoration, props and art direction. So rather than supporting the complex's renovation, television production work initially defined it as a rental facility with limited infrastructure.

The combination of all these factors ensured that from the late 1970s until the mid-1990s Cinecittà did not keep up with technological innovation and or maintain the quality of its infrastructure, which had flow on effects for film service providers. With an intermittent schedule of high-budget international productions and the demise of 'quality' Italian features with budgets enabling them to use Cinecittà, there was simply not the money available to modernise and maintain the facility – and without this modernisation there was even less likelihood of attracting international productions. The effects of this cycle can be seen in the 1993 auctioning of the studio's furniture and film props such as the desks where monks read forbidden

⁸⁵ Deborah Ball (1997), 'Film: Privatisation May Spur Lethargic Cinecittà – Storied Studio Refocuses on International Filmmakers', *Wall Street Journal Europe*, 9 December, p. 4.

⁸⁶ 'RAI gets more domesticated' (1995), *Broadcast*, 17 February.

⁸⁷ Deborah Ball (1997), 'Film: Privatisation May Spur Lethargic Cinecittà – Storied Studio Refocuses on International Filmmakers', *Wall Street Journal Europe*, 9 December, p. 4.

⁸⁸ Jude Webber (1997), 'Coming soon – Italian Cinema, the Remake', *Reuters News*, 10 March.

books from *The Name of the Rose* and the ballroom furniture from *The Leopard* – apparently necessary because the props company was getting no business.⁸⁹

In this context Cinecittà's mid-1990s renovation plans, including its development of a post-production focus, are perhaps best understood as reversioning it from a media city 'by default' to one 'by plan', allowing the various parts of its operations to complement and synergise rather than work against and detract from each other. In its actions since then Cinecittà has strived to develop productive connections between its domestic television work and its local and international film work.

MEDIA CITY BY DESIGN: STUDIO BABELSBERG

Berlin's Studio Babelsberg is important to this study for a number of reasons.

The first is the transformation of a historic studio complex into the prototypical 'media city' development. The Babelsberg complex has a long and distinguished production history, with the first (glass-walled) film production studio built on the site in 1912 by the Berlin film company Bioscop. In the 1920s it became the main studio complex of the leading German production company Universum Film AG (Ufa), and the location for such classic silent films as *The Blue Angel* and *Metropolis* (1926).

During the Nazi period, the complex remained a key site of film production. After the Communist take-over of what became East Germany in 1946, the studio became the home of the state film corporation DEFA (Deutsche-Film-Aktiengesellschaft), which monopolised film production in the East for over 40 years. Following the unification of Germany in 1990, the federal government committed DM3 million to support the production of a number of feature films at the studio and enable it to continue to function in the transition from state control to privatisation.⁹⁰

In 1992 the studio was sold by the Treuhand, the agency responsible for privatising the holdings of the former East German government, to a subsidiary of the French corporation Compagnie Generale des Eaux (now the international media conglomerate Vivendi Universal) and a British property development company for around DM140 million.

A key component of the refurbishment of the complex after privatisation was its transformation into a 'media city'. The site was divided into three different areas of use:

- film, television and media production;
- residential; and
- recreation/entertainment and retail which includes the theme park Filmpark Babelsberg, and the studio tour.

Over the four years to 1997, over 60 buildings onsite were demolished, and the remaining buildings renovated. Over the last decade, around DM1 billion has been invested in the site to upgrade basic infrastructure including roads, sanitation, electricity and high-speed fibre optic cable as well as production infrastructure.

In the film, television and media production area of the site, what we call the studio complex, new and renovated facilities include:

- the Television Centre, containing four large television studios;
- the Centre for Film and Television Producers, containing office space for tenant media companies;
- a new broadcasting centre for the television broadcaster Ostdeutsche Rundfunk Brandenburg (ORB);
- the Babelsberg fx Center, containing 14,000 square metres of studio space for digital film production, a preview theatre, office space and a virtual studio for show production and real-time 3D rendering;
- a new building to house the Konrad Wolf College for Film and Television, and another to house the Museum of Broadcasting.

⁸⁹ Vera Haller (1993), 'Rome's 'Hollywood on Tiber' Devastated by Fellini Death', *Reuters News*, 31 October.

⁹⁰ 'Government Stresses Desire to Maintain DEFA' (1991), *Sueddeutsche Zeitung*, 21 February, p. 31.

Today's 'media city'

This is the second reason Babelsberg is significant to this study: the suite of media production facilities and services it organises in its 'media city'. The studio complex includes all the elements we can expect to find in such a facility: 16 sound stages, the full range of production and post-production facilities including over 250,000 costumes and over 1 million props, production offices and workshops, a digital telephone network, and high-speed fibre optic cabling throughout the complex.

The complex is also home to over 130 tenant companies working in a variety of areas of media production and services, some resident in the digital post-production fx Center. Babelsberg houses the television networks ORB and ZDF, a film school, a technical school, the offices of the independent professional association Film Association Brandenburg, and the regional film commission Filmboard Berlin-Brandenburg. The studio's art department not only provides set construction and decoration services to film and television production, but also to leisure and entertainment events and facilities including theme parks.

Public-private partnerships

Babelsberg is significant to this study for a third reason: the range of 'public/governmental' and private functions and networks it helps to organise and interweave. As noted above, the complex is home to a public broadcaster, a private broadcaster, a training institution, and the regional film commission. In 1996 Studio Babelsberg established the Media Initiative Babelsberg, a mechanism to assist in networking media companies both in the complex and in Brandenburg more widely, and to promote and market the 'media city' and its tenants.

In 1998, in partnership with the German regional investment bank Investitions Bank des Landes Brandenburg (ILB), the studio established a film production finance and management company, Studio Babelsberg Independents (SBI), specifically to invest DM50 million annually in production by small and medium-sized production companies in the Berlin-Brandenburg region.⁹¹ This partnership appears to have now been wound up.

More recently, at the Babelsberg Media Conference held at the complex in August 2001, a new joint marketing venture known as production.net berlin babelsberg involving the four main studio complexes in the Berlin-Babelsberg region – Studio Berlin, Park Studios, Studio Babelsberg and Berliner Union Film – was formed to facilitate cooperation among service providers and win both national and international production for the region. The production.net is part of the larger media.net berlinbrandenburg, an alliance of around 90 media, IT and communications companies based in the region.

Since the late 1990s, and particularly since the death of co-chief executive Rainer Schaper in March 2001, Studio Babelsberg appears to have changed the focus of its business model from the simple provision of production services and facilities to all comers towards a greater interest in co-production. Studio Babelsberg Independents was established in 1998, and in the same year Babelsberg International Film Produktion, a media investment fund managed by Dutch bank ABN Amro, was also set up in late 1998 to attract international production and to build on the partnership between Studio Babelsberg and Hallmark Entertainment.

Former national film studio with a difference

The fourth reason Babelsberg is significant to this study is because it is an example of a renovated former national film studio, but one which has developed quite differently from, for example, Barrandov in the Czech Republic or Mafilm in Hungary.

As a result of its history and its position as an epicentre of production, the Babelsberg complex has caught the attention of local, regional, national and European politicians and publics. Since the fall of the Berlin Wall, a huge volume of public monies have been poured into the complex, first to keep it going, and subsequently to assist its renovation. In part, this is because the region is a priority development area with low (by European standards) socio-economic indicators. However, some of these monies have flowed because of the symbolic importance of renovating the complex as part of the larger efforts to restore Berlin as a media, cultural and political centre in both the reunified Germany and a rebuilt Europe.

⁹¹ 'German Studio Launches Production Outfit' (1998), *Screen Digest*, October, p. 218.

The unification of Germany 'resulted in the erosion of aspects of the GDR's cultural heritage and ensured its subordination' both to the film culture of the former West Germany, and to the demands of the international production market.⁹² The exhibition guarantee for DEFA product under the East German state film distributing monopoly Progress Verleih and the studio's annual production subsidy disappeared with the overthrow of the communist government.⁹³ Around 1600 of the studio's 2400 employees were made redundant, their filmmaking style and perspectives dismissed with disdain as anachronistic and emblematic of a discredited and defeated political system. Some were re-employed as tour guides for the theme park which opened on the studio lot in 1991. Helen Hughes and Martin Brady have argued that 'The story of the transformation of what was potentially one of the most lucrative assets of the GDR into the privatised concern of Babelsberg Studios GmbH was at the heart of a debate about not only the future of film in eastern Germany but also the industry as a whole'.⁹⁴

Studio Babelsberg is located in the German Land (or state) of Brandenburg, which, in common with the other former East German territories, receives considerable structural funding from the federal German government and from the European Union for regional economic development. The information and communication technology (ICT) and media industries have been singled out for support in Brandenburg as key economic drivers, recognition in part of the achievements and prospects of the studio and the 'media city'.

In June 1994, Brandenburg, as one of the new German Länder, received a share of DM26 billion in structural assistance from the European Commission towards regional economic development. This assistance, which was provided under the EC's Community Support Framework (CSF) 1994–1999, prioritised seven areas. The Babelsberg developments fit five and possibly six of these areas.⁹⁵ In 1999, when structural funds were allocated for the 2000–2006 period, Brandenburg was listed as an 'Objective 1' region, making it eligible for a share of the €19 billion allocation to Germany. This funding goes to partnerships between public authorities and the private sector.

In March 2001, a Babelsberg spokesman estimated that half of the investment in the complex over the previous decade had come from European Union sources and from national subsidies.⁹⁶ Announcing a contribution of DM2.75 million towards the renovation of the studio's post-production facilities in 1993, the European Commission declared that it 'considered the aid could be authorised because of the importance of the project for the European film industry in economic and particularly in cultural terms'.⁹⁷

There is ample evidence to suggest that Studio Babelsberg should be a major player in the international production market. It is centrally located in Europe, apparently well placed to profit from European Union initiatives to encourage audiovisual co-production, to develop skills and training, and to build on a culture and tradition of film production and innovation to become a key European centre for ICT industries.

Yet over the last decade since privatisation, the studio has not been as successful in attracting medium to high-budget international production as might have been anticipated by its owners and managers. There has been some suggestion that since the filming there of Jean-Jacques Annaud's *Enemy at the Gates* in 2000 and more recently Roman Polanski's Camera d'Or and Academy Award winner *The Pianist*, that this will change and the studio will become an increasingly favoured venue for international production.

But its recent history has been dogged by managerial reshuffles and changes in strategic direction, and both Annaud's and Polanski's projects were won for Babelsberg by the influence of the former manager of film production at the studio, the late Rainer Schaper. After a couple of years under Gabriela Bacher in

⁹² Leonie Naughton (1998), 'That Was the Wild East: Filmpolitik and the 'New' Germany', unpublished paper delivered at History and Film Conference, Brisbane, 29 November.

⁹³ Mark Heinrich (1990), 'East German State Film Studio Feels Cold Wind of Capitalism', *Reuters News*, 25 April.

⁹⁴ Helen Hughes and Martin Brady (1995), 'German Film after the *Wende*' in Derek Lewis and John R.P. McKenzie (eds), *The New Germany: Social, Political and Cultural Challenges of Unification*, Exeter: University of Exeter Press, p. 276.

⁹⁵ See European Union press release 'Structural Funds: The Commission Approves the Community Support Framework for Germany 1994–99', IP/94/564 21/6/1994; <http://europa.eu.int/> accessed 26/2/03.

⁹⁶ Mark R. Johnson and Vanessa Liertz (2001), 'German Studio Transforms Itself into a Co-producer', *Asian Wall Street Journal*, 21 March, p. N5.

⁹⁷ 'EC Approves \$1.6 mil in Babelsberg Studios Aid' (1993), *Hollywood Reporter*, 2 November, p. 1-2; 'Germany: Extra Cash for Babelsberg' (1993), *Media Monitor*, 12 November, p. 4; 'Babelsburg [sic] Opens 'Biggest' Euro Film Studio' (1994), *Pro Sound News Europe*, January, p. 1.

which Babelsberg concentrated on attracting English-language international production, emphasis has now again been placed on the significance of German production to the complex.

But while there is considerable television production in Germany, Studio Babelsberg has had limited success in attracting projects, despite the presence of the local public broadcaster and UFA Film and Television, a subsidiary of Bertelsmann, which also owns the television network RTL. The fx Center development was jeopardised when the developer went bankrupt in 1999, and although it was completed, some of the space remains vacant. The complex's permanent workforce, which numbered around 2400 at the end of the DEFA period, has been reduced to about 180.

And although Babelsberg's troubled owner, Vivendi Universal, confirmed its intention not to sell the complex following the expiration at the end of 2002 of the contractual obligation prohibiting sale for 10 years after purchase in 1992, it is widely accepted that the reasons for retaining the complex are not entirely or primarily media-related. Rather, Babelsberg is considered important for its real-estate value but because land prices around Berlin have not risen as expected a decade ago Vivendi Universal could expect to make a substantial loss if the site were sold now. Therefore, the logic goes, the company will hold onto the site until its sale prospects are more promising.

On a more positive note, the site does boast a leading film school, and the studio is at the heart of the Medienstadt, a development designed to function as a crucible of innovation in digital media production. The future appears bright, then, for the studio as a centre for training, research and development. But continuing uncertainty about Vivendi Universal's intentions for the site, coupled with relatively high production costs in Germany, may discourage some international producers.

THE MEGA-MEDIA CITY: PINWOOD AND SHEPPERTON

Pinewood and Shepperton are individually the largest and most important studio complexes in Britain. Even before their merger in 2001 they were epicentres of substantial agglomerations of media businesses with intensive transactional networks.⁹⁸ This clustering, when combined with their sheer size and complexity, has formed the base of their leading position in the industry both in Britain and internationally.

The merger of Pinewood and Shepperton coincided with the British government's focus on creative industries as a sector to be fostered, partly by the active solicitation of foreign production through the British Film Commission, which obviously laid great emphasis on the major studio complexes. The 1998 extensive review of the British film industry, 'A Bigger Picture', argued for the creation of a stable production base as a means to produce the necessary 'good quality' jobs in the information and knowledge-based industries at the core of the 21st century economy.

After the recent merger the combined facilities have over 200 service companies operating from their lots, 16 large sound stages, 13 medium sound stages and four small sound stages. Productions using the complexes are also able to call upon the substantial number and variety of media-related firms and facilities that have built up immediately adjacent to the facilities and in the greater London area.

The pre-eminent position of these two studio complexes internationally helps explain, perhaps, their involvement in advising studio complex development and management around the world.

Strategies for maintaining pre-eminence

The merger of these two existing media cities, situated around 30 kilometres apart but linked by an intranet, created a mega-media city. In the face of competition from studio complexes both within and outside Britain the merger is part of a strategy to maintain their respective positions as the pre-eminent facilities for the production of high-budget feature films. Merging the facilities was designed to better coordinate their use and availability for international production. It also enables them to pitch for and

⁹⁸ Nicholas cited in Allen J. Scott (2000), *The Cultural Economy of Cities: Essays on the Geography of Image-Producing Industries*, London: Sage, p. 103. Contrasts the 'sizeable agglomerations around the Pinewood and especially the Shepperton studios' with their French counterparts. This might help explain why the French studios have not been as able to capitalise on international production dynamics as much as they might have.

accommodate more high-budget production work because this work can be more efficiently spread and sequenced across both facilities than if they were to remain operating as independent entities. The need to better 'rationalise' the timing of the use of facilities stems from the space problems created by international films taking up studio space for extended periods of time.

With a history of competing against each other for the same production work, the merger arguably permitted the combined studio complex to bid from a consolidated and united rather than separate and fragmented position. The merger also needs to be seen in light of the loss to its major emerging rival, Leavesden, of *Harry Potter and the Philosopher's Stone* when reportedly 'individually, they did not have enough sound stages to accommodate the US\$130 million adaptation'.⁹⁹ A combined Pinewood-Shepperton would not only have a competitive edge over its rivals in its core high budget feature film market but would also be in a position to move into areas it had previously not actively competed in.

Another way in which the combined Pinewood-Shepperton operation has sought to remain 'on top' is through the addition in 2000/01 of two state-of-the-art digital television studios in the Pinewood complex, designed for widescreen television. Pinewood developed digital television production facilities shortly after the complex was taken over by a consortium led by Michael Grade, former chief executive of Channel 4. This has enabled it to win production from existing studios in Britain and to decisively enter the market for UK television production. The quiz show, *The Weakest Link*, was lured to Pinewood from Magic Eye Studios in Wandsworth.

With digital television at an advanced stage in Britain, the move to develop digital television production facilities is designed to cement the complex's position as Britain's leading production facility. In the short term, the move is focused on the domestic British television production market, but the addition of these facilities also serves to place Pinewood in a strong position to compete for international digital production work.

Production characteristics

It has been argued recently that not only has the stability of Britain's production base historically been dependent on 'the availability of American production finance provided by the large, internationally dominant US distributors' but it will also remain so in the future.¹⁰⁰ Independent British producers have always been to some extent dependent on and subordinate to the US majors, as evidenced by the fragility of small firms faced with the booms and busts in British filmmaking, and the historical reliance on American capital. Small production firms and independent producers are cast in one of two roles in their engagement with international production:

- '*dependent*: complementing and serving the interests of large firms; [or]
- '*innovative*: operating in (often founding/developing) specialised new products or markets but remaining vulnerable to the potentially fatal attentions of large organisations'.¹⁰¹

There are three constants in this structural assessment of British production sector: the recurrent emergence of a cohort of independent producers, the short life many production companies will enjoy, and the enduring power of the majors. But to this list should be added a fourth constant: the consistent ability of the large British studio complexes, most particularly Pinewood and Shepperton, to attract very high-budget, blockbuster productions.

As noted in Chapter 2, Pinewood-Shepperton has had a historically significant role as production locations for high-budget feature film. Such films are basically their stock in trade and until recently none of the other international studio complexes was realistically able to compete for this business, whether because of deficiencies in infrastructure and technical capacity, an absence of requisite skilled crew or an absence

⁹⁹ Adam Minns (2001), 'Pinewood-Shepperton Eyes European Expansion', *Screen Daily*, 12 February. <http://www.screendaily.com/story.asp?storyid=3994> accessed 28 February 2003.

¹⁰⁰ Helen Blair and Al Rainnie (2000), 'Flexible films?' *Media, Culture & Society*, vol. 22 no. 2, p. 187.

¹⁰¹ Helen Blair and Al Rainnie (2000), 'Flexible films?' *Media, Culture & Society*, vol. 22 no. 2, p. 193

of relationships with Hollywood majors. It should be noted in this last respect that independent production units 'throughout the history of the industry in the UK, have had alliances with major US distributors'.¹⁰²

In this sense it is debatable whether high-budget productions shooting out of Pinewood-Shepperton have been in the same market as their Eastern European, Canadian or Australian counterparts – at least until recently. However, with the rise of British competitors such as Leavesden and the increasing technical and infrastructural capacity of studios outside UK/USA, Pinewood-Shepperton has needed to rethink its competitive strategy. Its response has been to build on its relationships with film, television and commercial production companies, exploit the flexible character of its facilities and (potentially) service every size of production. With its move into television production, including live and drama production, Pinewood-Shepperton could be seen as reworking the media strategy of a Cinecittà to British circumstance.

THE NEW MEDIA STUDIO COMPLEX: EALING STUDIOS AND THE PROPOSED LEAVESDEN REDEVELOPMENT

Both the Ealing and Leavesden studio complexes are reinventing themselves to maintain their position as production and innovation centres for a broader filmmaking mix in an increasingly competitive market.

At the heart of these redevelopments is a business model which builds on renovating and extending an existing studio complex while simultaneously creating a media-focused industrial park around it. The presence of a studio complex helps create the proposed 'state-of-the-art media village'¹⁰³ for Ealing and the 'film and media business park'¹⁰⁴ for Leavesden by attracting a range of tenants. The studio complex benefits from those tenants seeking to service associated production and post-production needs; the industrial park benefits from the clustering into a 'community of like minded industry sectors' that the studio complex helps promote.¹⁰⁵

Here the studio complex is *part of the development and management of the business park* rather than the businesses on site being part of the studio complex. Given this emphasis it is unsurprising that both redevelopments have property development and management expertise at their heart. For Leavesden it lies with the owner, MEPC, which describes itself as a property company specialising in business parks and as 'one of the largest property companies in the UK'.¹⁰⁶ For Ealing, the consortium includes the property developer, the Manhattan Loft Company, alongside a film producer and a new media company.

In both cases specific expertise in large-scale property development and management is coupled with film services and production, and architectural design. While there is a continuing 'strong emphasis' on film and television, the business model for these business park/media villages is also strongly predicated on attracting a range of tenants drawn from outside traditional media in 'related industries' such as information technology. Like their studio complex counterparts and unlike some industrial parks the property development model in operation here is one which sees the property developer retain ownership of the park. MEPC claims that this 'allows for flexible leasing arrangements and enables the company to manage and maintain its properties to a very high standard'.¹⁰⁷

In both complexes their redevelopment is pitched *in new media terms*. Ealing aims to provide the 'new digital media centre/next generation studio'¹⁰⁸ by 'bringing together a variety of disciplines from both traditional film and television as well as cutting edge media and digital companies';¹⁰⁹ Leavesden aims for

¹⁰² Helen Blair and Al Rainnie (2000), 'Flexible films?' *Media, Culture & Society*, vol. 22 no. 2, p. 201.

¹⁰³ Adam Minns (2001), 'UK's Ealing Studios Set for \$100m Revamp', *Screen Daily*, 14 June.
<http://www.screendaily.com/story.asp?storyid=4966> accessed 28 February 2003.

¹⁰⁴ Reference to Leavesden redevelopment. See Angela Jameson and Dominic Walsh (2001), 'MEPC Plots New British Film Studio', *The Times*, 19 February.

¹⁰⁵ See 'Media Park Soon', *Hemel On-line*, October 30, 2002,
http://www.hemel Hempsteadtoday.co.uk/custom_pages/CustomPage.asp?Page=1026; accessed 6 February 2003.

¹⁰⁶ See 'Planning Statement', no date, <http://www.leavesdenpark.com/pdf/planstate.pdf> accessed 25/2/03, p. 3.

¹⁰⁷ Planning Statement, p. 3.

¹⁰⁸ Bob Cummings, new wireless ventures manager at BT wireless, quoted in 'BT wireless's Expidas Officially Opens Its First Facility at Ealing Studios', press release. See http://press.nokia.com/PR/200108/829730_5.html; accessed 7/5/03.

¹⁰⁹ See 'BT wireless's Expidas Officially Opens Its First Facility at Ealing Studios', press release. See http://press.nokia.com/PR/200108/829730_5.html; accessed 7/5/03.

an 'environment dedicated to the 'new media industries'' combining 'information technology, telecommunications and entertainment industries in a vibrant new business community'.¹¹⁰

Central to both is their bid to meet *emerging* digital studio needs of traditional film and television and to combine these with the needs of both emerging new media platforms – 'digital TV, mobile communications, computer games and for the Internet'¹¹¹ – and the information and communication technology industries more generally. For Leavesden this connection is to be made through drawing upon 'the existing cluster of skills knowledge and infrastructure' created by the studio complex 'to establish a local cluster or hub which links New Media with the two sectors on which it relies – traditional media (particularly film and video) and IT/electronics and advanced communications'.¹¹² The outcome is promised to be an 'internationally significant telecommunications media and technology park'. For Ealing the key to the development 'is the provision of a state of the art technology infrastructure and high-speed connectivity, tailored to the needs of digital media'.¹¹³

For both studio complexes, the telecommunications connection is writ large, with BT (British Telecom) maintaining a significant R&D presence on both sites. In Ealing's case BT has established on site the first of many planned BT Wireless and partner satellite application development centres. The aim of such centres is to provide 'developers with the tools necessary to test and integrate their applications' in a supportive environment which includes onsite 'technical and commercial teams'. BT's partners in the Expidas venture at Ealing include Ericsson, Lucent Technologies, Marconi, Motorola and Nokia, who are looking to 'maximise their individual portfolio of applications' by building and supporting networks of 'third party application developers'.¹¹⁴ At Leavesden BT has pre-let 18,000 square metres of office space on the first phase of the redevelopment with an option on a further 4,000 square metres. This is part of BT's strategic relocation program to move staff out of central London.¹¹⁵

With this telecommunications and industrial park focus, these studio complexes are being yoked here to broader R&D, innovation agendas centred on digital technology. For Leavesden this means projecting the redevelopment as a 'knowledge economy' development – this also meets the regional development agendas as set out in the Hertfordshire Structure Plan Review 1991–2011, which has a 'main emphasis on promoting the knowledge economy rather than mass industrial production'.¹¹⁶ For Ealing's co-owner, John Kao, 'Ealing Studios seeks to be an innovator – in the quality of the space we create, in the content we make, in the technologies we use'.¹¹⁷ Ealing's website claims its combination of 'film, technology and property expertise' as providing its defining character and competitive edge. Since the refurbishments are still continuing, and are at an early stage in Leavesden's case, it remains to be seen whether either redevelopment will fulfil the promise held out for them.

A feature of both of these studio redevelopments is their focus on sustainability through the leasing of office space within a 'park'/'village' context. By definition these tenancy arrangements are predicated on a significant degree of non-exclusivity as to who can be a tenant and how many companies of a like character can operate out of the site. This will make them, in principle, a lot more accessible to media and technology businesses than are some studio complexes. However, while non-exclusive access is envisaged, both redevelopments are keen to preclude 'inappropriate users'. In Leavesden's case this exclusion list includes 'call centres or finance sector companies' – on the grounds that they are neither suitable nor economically viable in that location. These exclusions are designed to 'ensure that the cluster will achieve the "critical mass" necessary to confirm the park's status as a TMT [telecommunications media and

¹¹⁰ 'Planning Statement', no date, <http://www.leavesdenpark.com/pdf/planstate.pdf> accessed 25 February 2003, p. 14.

¹¹¹ Uri Fruchtmann, principal of Fragile Films and co-owner of Ealing. See Rupert Butler (2001), 'Film Studios in the Digital Age', <http://www.britishembassy.com/news/010919f.htm>, accessed 7/5/03.

¹¹² 'Planning Statement', no date, <http://www.leavesdenpark.com/pdf/planstate.pdf> accessed 25 February 2003, p. 14.

¹¹³ See 'BT wireless's Expidas Officially Opens Its First Facility at Ealing Studios', press release. See http://press.nokia.com/PR/200108/829730_5.html; accessed 7/5/03.

¹¹⁴ See 'BT wireless's Expidas Officially Opens Its First Facility at Ealing Studios', press release. See http://press.nokia.com/PR/200108/829730_5.html; accessed 7/5/03

¹¹⁵ See 'MEPC Secures One of the Largest Pre-lets in the South East for 10 Years' (2000), 17 March, http://www.leavesdenpark.com/news_content.html accessed 25/2/03.

¹¹⁶ 'Planning Statement', no date, <http://www.leavesdenpark.com/pdf/planstate.pdf> accessed 25 February 2003, p. 7.

¹¹⁷ See Ed Harris (2001), 'Passport to Ealing Gets Renewal Stamp', *Evening Standard* (London) 14 June.

technology park]'.¹¹⁸ This takes the media city concept developed in Cinecittà, Babelsberg and Pinewood-Shepperton, and extends it in the direction of a 'media park or media village with a studio complex'; rather than, as they are, 'a studio complex with a media city'.

While sharing many similarities there are some significant differences between Leavesden and Ealing. Leavesden is a large-scale urban development and regeneration project for a former aerodrome. As it is located within the greenbelt the planning approval process was lengthy and limited the kinds of development possible. The Leavesden studio complex began as a 'warehouse conversion' of a former Rolls Royce aircraft factory in 1994. The size, height, and infrastructures required to work on and house aircraft meant that the warehouse conversion started from a more film-friendly base than many other conversions. Some of the factory buildings, including the largest building onsite, were converted into sound stages, backlot and production facilities, while its runway served as a level and stable base for prop construction. Leavesden's location means there is a lot of space for the multiple sound stages and backlot required by high-budget feature production – its backlot is claimed to be notable for its 180 degree uninterrupted horizon. The recently approved development plans allow for the building of 18,500 square metres of film production facilities, 93,000 square metres of office space and 9,300 square metres of gym, restaurants, cafes, children's nursery and retail.¹¹⁹ The size of the development means that the property developers can contemplate the creation of a 'studio tour' (i.e. a theme park) onsite.

Unsurprisingly, given the mixed-use character of the Leavesden site, a range of new services are being provided: its day nursery, gym and vocational health facilities, shopping centre and nature reserve are part of the 'provision of essential services and facilities to the occupiers of their properties' and to the nearby new residential area.¹²⁰

By contrast Ealing is an inner-urban redevelopment. The facilities are therefore more focused and limited, with none of Leavesden's felt requirements to establish basic essential facilities and services.

Ealing's cluster strategy is specialised, with its digital production aspect foregrounded through its first redeveloped area, a digital animation studio. It has recently negotiated a co-production alliance with Vanguard Films to produce a slate of high-budget feature animations, the first of which – *Valiant* – is currently in production. This is part of a strategy to be 'a leader in the development of pioneering cross-platform content; a home for edgier, digital productions'. To that end it is seeking to 'build high-profile partnerships from the worlds of film, music video, art, fashion and design'. The consortium redeveloping the studio complex includes a production company, Fragile Films, which made *The Importance of Being Earnest* (2002) at Ealing and plans to make further feature films there.

While television is omitted from this list, the complex is not ruling out participation in TV production but seeing it as part of their 'new and emerging platforms' focus and their emphasis on a 'strong multi-platform approach to production'.¹²¹ With a vision touted as bringing 'film, technology and property expertise' together, the redevelopment of this famous studio complex foregrounds, perhaps even more explicitly than the media city developments, the importance of its rental property development strategy and its related emphasis on creating a digital precinct of companies, some of whom may not have a media focus.

CONCLUSION:

AUSTRALIAN STUDIO COMPLEXES IN RELATION TO INTERNATIONAL DEVELOPMENTS

The two existing Australian studio complexes do not have as comprehensive a range of tenants as do Pinewood-Shepperton, Babelsberg and Ealing. There is not the same routine engagement with broadcasters; neither complex is as wound into television production of all kinds as are their UK and Italian counterparts; and they are not as extensively involved in film and television training as are Babelsberg and Cinecittà. There is not the same range of agencies – film commissions, film funding

¹¹⁸ 'Planning Statement', no date, <http://www.leavesdenpark.com/pdf/planstate.pdf> accessed 25 February 2003, p. 14.

¹¹⁹ The plans were approved in February 2003. See 'UK's Largest Media Park Gets Consent' (2003), http://www.leavesdenpark.com/news_content.html 17 February, accessed 25 February 2003.

¹²⁰ 'Planning Statement', no date, <http://www.leavesdenpark.com/pdf/planstate.pdf> accessed 25 February 2003, p. 3–4.

¹²¹ See <http://www.ealingstudios.co.uk/news/Alternative.html> accessed 5 February 2003.

agencies and so on – onsite as can be found, for example, in Babelsberg. The Australian complexes represent less the film industry of the city/region/country than the international film production industry in the country.

As new complexes it is perhaps not surprising that there is not the same level of clustering of film-related creative industries adjacent to the Australian studios as can be found in Pinewood-Shepperton. While such clustering may emerge over time, there is not the same attention from within Warner Roadshow or Fox Studios to create adjacent media parks of the kind that Leavesden or Ealing are currently creating. The Sydney Harbour Foreshore Authority manages the Canal Road development in inner Sydney where a range of small to medium-sized film services businesses operate to service the Fox lot. In the Gold Coast this is happening through the private rental market. There is, however, a non-exclusive ‘media park’ development occurring in Sydney through the business park plus studio development at Serenity Cove in Sydney’s southern side. While both the Warner Roadshow and Fox Studios complexes would say they have ‘sufficient’ tenants, this sufficiency in part stems from the largely international production industry focus of their operations. Both existing complexes are not as self-evidently sites of local production as are their Pinewood-Shepperton, Cinecittà or Babelsberg counterparts.

In Australia studio complexes tend to be endorsed by governments within a frame related to film production rather than broadcasting. The idea of subsidising broadcasters in a studio complex and promoting public expenditure on developing set stages for talk, quiz and variety shows is thinkable in the British, Italian and German contexts but not so much in Australia. Indeed Australian thinking about film and television tends to separate drama and documentary from quiz and variety and this works against the co-location of quiz, variety or reality TV shows in Australian studio complexes.

In addition the modest budgets of domestic features and TV drama production, where costs need to be kept low and every economy needs to be made, do not make for shooting in a studio complex. In the case of *Blue Heelers*, for example, its ‘rack and roll’ production method (which sees the sets rolled out for shooting on the first three days of the week using pedestals and video and then rolled away again to make way for other productions on site over the rest of the week) is designed to make the production viable. It would make little economic sense for it and other like productions to relocate to an expensive sound stage in a studio complex. The only way this kind of low-budget production could be done in a studio complex is if the complex is owned or operated by the production company – so there would be a capacity to absorb the rental cost.

Melbourne, it might be noted, is beginning with high hopes of integrating domestic and international production. So did each of the existing studio complexes, and after some strong initial activity neither has ended up consistently meeting this aim. But this may have to do with the economic structure and existing organisation of the local film and television industries, which developed in the absence of substantial studio complexes.

Chapter 4

Capturing the studio complex and its liaison networks

There are many similarities between the contemporary studio complex and its predecessors. There is the same pattern of plant and equipment: a large lot; sound-proofed, purpose-built shooting stages; construction workshops; adjacent offices; purpose-built lock up storage facilities; film production equipment; film processing facilities and a variety of post-production spaces.

There is the same pattern of adjacent suppliers and niche service providers. Like earlier complexes, the contemporary studio is predicated on the 'one-stop shop' principle – of having under the one roof a variety of facilities permitting the seamless coordination of various production activities. But importantly (and distinguishing contemporary complexes from those operating in Hollywood's classical era), these complexes are just as capable of servicing *parts* of production, and indeed parts of multiple productions at the same time.

There is the same need for constant production activity to recoup the significant capital investment required to create and maintain these facilities. So too these complexes are generally marked by their having 'anchor tenants' – usually production companies which may have a variety of links to the Hollywood majors.

As in the classical Hollywood era, many of these complexes are either owned or operated by one or other of the Hollywood majors or their parent or subsidiary companies, which may shoot their own films on site (for example, *Scooby Doo* at Warner Roadshow Studios, or *Moulin Rouge* at Fox Studios Sydney). And as in post-Second World War Hollywood, when the majors divested their interests in studio complexes and rented the spaces needed for production, the sound stages in contemporary complexes may be rented out to other majors or related production companies. And they are, of course, rented or leased out to independent producers who could not afford, or do not wish, to buy or operate them.¹²²

From all these many similarities it might seem that little has changed. But similarities in physical form and function belie the substantially different place and function of these studios in contemporary ecologies of local and international production.

There are various aspects to this difference. The relations between the studio space and major production/distribution/financing companies on the one hand, and between the studio and the various productions carried on within it on the other, have discernibly changed.

FROM STUDIO RESOURCE TO 'COMMAND AND CONTROL' CENTRE: THE CHANGING ROLE OF THE HOLLYWOOD 'MAJORS'

In the old system, the 'studio resource', like contracts locking in above-the-line film talent, was a key element in the competition among, and collective market power of, the Hollywood majors.¹²³ This control over sources of supply (including in the 1920s and 1930s supply of equipment¹²⁴) made studios synonymous with Hollywood major distribution and production companies. It also led to the significant geographic concentration – indeed agglomeration – of production infrastructure, services and expertise in a particular region. As a US Department of Commerce report put it: 'facilities were geographically fixed due to the complex construction and infrastructure necessary to connect all of the disparate pieces of specialized equipment that were configured to perform certain processes'.¹²⁵

¹²² Danny Miller and Jamal Shamsie (1996), 'The Resource-Based View of the Film in Two Environments: The Hollywood Film Studios from 1936 to 1965', *Academy of Management Journal*, vol. 39 no. 3, p. 531 June, p. 9

¹²³ Miller and Shamsie (1996), 'The Resource-Based View of the Film in Two Environments', pp. 531–532.

¹²⁴ This included cinema projection and camera equipment. On the problem facing a Canadian filmmaker in the teens and twenties of the 20th century purchasing camera equipment, see Mike Gasher (2002), *Hollywood North: The Feature Film Industry in British Columbia*, Vancouver: UBC Press, p. 28.

¹²⁵ United States International Trade Administration (2001), *The Migration of US Film and Television Production: Impact of 'Runaways' on Workers and Small Business in the US Film Industry*, report Commerce Department, January, p. 66.

Such a situation suited what was a horizontally and vertically integrated industry, with predictable and straightforward distribution and production pathways through film theatres associated with the majors¹²⁶ and exhibition chains internationally through output deals. The scale and extent of studios in turn depended on the size, financial muscle and depth of *local* film production capacity – as the US Department of Commerce put it, there needed to be ‘a sufficient amount of local film production to support the substantial capital investment in their plant and equipment’.¹²⁷ In practice this meant that the existence of purpose-built studio complexes depended in part on the capacity of a country’s production industry to sustain them.

These several elements created significant barriers to entry not only for new players but for players in smaller countries who were able to draw on only a limited local infrastructure. Extensive purpose-built studios therefore tended to develop in the larger European countries on the periphery of major metropolitan centres – and these studio locations in London, Rome, Paris, (and to a lesser extent at least until the end of the 1980s, those in Prague and Berlin) attracted international productions. For their part, indigenous production companies in smaller countries like Australia and Canada worked from smaller studio facilities in one or two locations. Soviet bloc countries such as Czechoslovakia and East Germany were able to build or refurbish large and integrated studio complexes because of the communist command and control system that centralised almost all screen production in particular locations as an organising surveillance and efficiency principle.

In the new studio system the Hollywood majors are partially disconnected from their studio complexes. This can cause some confusion because when commentators talk about the ‘Hollywood studios’ they are not usually referring to the physical plant but to the ‘command and control’ distribution and financing operations of the Hollywood majors. Studio complexes are more likely to be regarded as rental facilities and as such may or may not be used by the Hollywood major ‘owner’. Warners barely used its complex on the Gold Coast over the 1990s and was instead content to lease it out mostly for telemovie, international series production and medium-budget Hollywood-sourced features such as *Fortress*. Its theme park franchise was much more important to its marketing of signature Warner product in various ‘themed rides’ and merchandise. Only with *Scooby Doo* did the ‘theme ride’ and the film studio become one and the same. The key competitive asset of a Hollywood major is no longer its ‘studio resource’ and talent contracts; rather it is its capacity to manage its various ‘knowledge assets’.¹²⁸

For Danny Miller and Jamal Shamsie ‘the discrete knowledge-based resources of each studio [i.e. major] lie in the creative and technical skills that it has been able to build up’. These are not only to be found in the ‘unique abilities in various areas of film production that it could use to differentiate its films from those produced by its competitors’ but also, and perhaps more critically, in the expertise in integrating these ‘discrete abilities ... by developing coordinative team skills’.¹²⁹ As Allen Scott puts it, the Hollywood majors and TV networks ‘occupy a central position’ by ‘coordinating the financing, production, and distribution of final outputs’.¹³⁰

The Hollywood majors are not so clearly synonymous with or connected to their affiliated studio complex. Their real ‘strength’ lies instead both in their ‘command and control’ functions – their capacity to ‘assemble large groups of temporary employees who had little experience working together to collaborate on each complex, big-budget project’¹³¹ – and in their intellectual property rights holdings. As Christopher Thornberg, a senior economist with UCLA Anderson Forecast, told a conference at the University of California Los Angeles in March 2002, ideas for productions may be generated or refined in Los Angeles, but production increasingly goes on elsewhere as the city ‘evolv[es] from a production center to a design center’.¹³² This is the ‘global Hollywood’ phenomenon, evidenced by growing volumes of international

¹²⁶ Danny Miller and Jamal Shamsie (1996), ‘The Resource-Based View of the Film in Two Environments: the Hollywood Film Studios from 1936 to 1965’, *Academy of Management Journal*, vol. 39 no. 3, June, p. 532.

¹²⁷ United States International Trade Administration (2001), *The Migration of US Film and Television Production*, report Commerce Department, January, p. 66.

¹²⁸ But even here we need to be careful. Miller and Shamsie suggest that ‘old Hollywood’ may have also critically relied on knowledge barriers.

¹²⁹ Miller and Shamsie (1996), ‘The Resource-Based View of the Film in Two Environments’, pp. 532–533.

¹³⁰ Allen J. Scott (2000), *The Cultural Economy of Cities: Essays on the Geography of Image-Producing Industries*, London: Sage, p. 181.

¹³¹ Miller and Shamsie (1996), ‘The Resource-Based View of the Film in Two Environments’, p. 533.

¹³² The evidence for this is seen in the rising proportion of management and administration jobs in the production industry in southern

production, which is generating such concern both in Los Angeles itself and in other centres around the world.

The majors' grasp of 'command and control' knowledge-based resources has allowed them 'to succeed not by market control or by precluding competition, but by giving firms the skills to adapt their products to market needs and to deal with competitive challenges'.¹³³ Indeed such firms are 'protected from imitation not by legal or financial barriers, but by knowledge barriers'.¹³⁴ In a fragmented, uncertain global audiovisual environment characterised by multiple pathways, formats and players, the 'knowledge' to negotiate this maze becomes all the more important. Thus physical assets like studios may be less important – as Miller and Shamsie put it they are 'imitable and purchasable and thus cannot confer any true competitive advantage'.¹³⁵ This apparent decline in the importance of Los Angeles studio complexes as core assets of the Hollywood majors has been fundamental to the emergence of studio complexes in diverse locations both within and outside the USA.

The Hollywood major and the contemporary studio complex rely on an army of small to medium-sized business enterprises which provide contracted services to the production industry. For Miller and Shamsie the contemporary Hollywood majors compete through their command of knowledge based resources rather than their 'control of sources of supply' – indeed this is very clearly seen in the way the Hollywood majors have maintained their market position while subcontracting out much of the work of actual production to independent firms.¹³⁶

The move towards a network of deals and the contracting out of services to large groups of temporary employees is a feature of the entertainment business generally. It evolved to meet the circumstances of growing risk associated with an increasingly segmented market 'in which different products competed for the consumer's entertainment expenditures'.¹³⁷ With increased uncertainty and a multitude of pathways for audiovisual product the contemporary entertainment industry adopted a more flexible and specialised shape, looking to independent producers to 'develop these differentiated film products'.¹³⁸ Film and television markets are not only subject to rapid changes in consumer tastes and fashions, but many productions lose money and a few hit productions can cover this slate.¹³⁹ As Miller et al describe the contemporary Hollywood majors:

The studios [majors] are said by some to have entered a post-Fordist phase of flexible specialisation [in the 1940s], through product differentiation and vertical disintegration that rely on high-end genres and subcontracted independent producers, pre- and post-production companies, and global locations, rather than comprehensive in-house services. There are, for example, literally hundreds of multimedia production houses in Southern California and most film and distribution businesses there employ fewer than 10 workers. They add up to an interconnecting critical mass, a cluster of technology, labour and capital, which operates through contracts with and investments from the studios, rather than ownership by them. The system works because of four factors: flexible delivery of services by specialised companies; intense interaction between small units that are part of a dynamic global industrial sector; highly diverse and skilful labour; and institutional infrastructure.¹⁴⁰

A number of consequences follow from this. Perhaps the most important for our purposes was the majors' turn to location or dispersed production from the 1940s in search of cheaper labour, cost reductions and market openings, and also for authenticity and feel. The particulars of certain places are important here. Whereas in the classical era it was the norm to recreate locations in the controlled environment of the

California. 'UCLA's Anderson Forecast Conference Examines the Forces Altering the Business of Hollywood' http://www.anderson.ucla.edu/admin_dept/media_rel/feature/forecast_recap_02.html Accessed 15 April 2002.

¹³³ Miller and Shamsie (1996), 'The Resource-Based View of the Film in Two Environments', p. 522.

¹³⁴ Miller and Shamsie are probably overstating their case given the significant control over global investment characteristic of the Hollywood majors. But it could be argued that their financial clout in an era of diverse investment sources from around the world is a consequence of this command of 'knowledge resources', which in turn creates the confidence of investors.

¹³⁵ Miller and Shamsie (1996), 'The Resource-Based View of the Film in Two Environments', p. 531.

¹³⁶ See Allen J. Scott (2000), *The Cultural Economy of Cities: Essays on the Geography of Image-Producing Industries*, London: Sage, p. 181.

¹³⁷ S. Christopherson and M. Storper (1986), 'The City as Studio, the World as Backlot: The Impact of Vertical Disintegration on the Location of the Motion Picture Industry', *Environment and Planning D: Society and Space*, vol. 4, p. 308.

¹³⁸ Michael Storper (1989), 'The Transition to Flexible Specialisation in the US Film Industry: External Economies, the Division of Labor, and the Crossing of Industrial Divides', *Cambridge Journal of Economics*, vol. 13 no. 2, p. 281.

¹³⁹ Allen J. Scott (2000), *The Cultural Economy of Cities: Essays on the Geography of Image-Producing Industries*, London: Sage, p. 174.

¹⁴⁰ Toby Miller, Nitin Govil, John McMurria and Richard Maxwell (2001), *Global Hollywood*, London: BFI, p. 55.

studio complex and use second-unit location shots primarily in rear projection or to stitch together scenes shot on sound stages or on the studio backlot, by the 1980s it was generally accepted that: 'location shooting is now a genuine alternative to the studio in most situations, offering a more 'realistic' look and lower overhead costs'.¹⁴¹ But location production was not only utilised to create a realistic look. The value of particular locations was increasingly recognised to lie in their capacity to stand in as 'generic spaces', which in turn advantaged adjacent studio complexes or focused attention on the viability of constructing complexes to service the growing volume of internationally mobile production.

Locations were sold by growing numbers of film commissions representing particular regions on the basis of being both somewhere and anywhere; as Aida Hozic puts it, 'the path towards participation in global cultural production depends precisely on the ability of places to successfully suppress their uniqueness and painlessly transform themselves into *whoever, whatever, whenever* sites'¹⁴² – that is, their attraction is dependent on their capacity to be 'bent' or 'reshaped' for a variety of creative or narrative purposes.

This is the Queensland-as-anywhere setting of the *Mission Impossible* television series, or of the many telemovies filmed at the Gold Coast complex and surrounding locations in which the locale is disguised by the matte of international production, leading to the claim that 'no aspect of Queensland culture [is] involved'.¹⁴³

Viewed in the cold light of economic calculation alone, local particularities may easily be discounted, but the capacity of a location to have meaning must never be underestimated. By the 1980s this focus had not only led to the promotion of locations through offering rebates, purpose-built facilities and the like, but also to the 'split locational' phenomenon within Hollywood filmmaking in which, in Mike Gasher's words, 'pre-production and post-production work concentrated in Los Angeles and production activity dispersed globally'.¹⁴⁴

A consequence of these developments is that the contemporary production facility or studio complex is primarily conceived in terms of the services available to international audiovisual production in a particular city, region, state or nation, but as we show these complexes are entangled with local production in many ways. They are, however, primarily rental spaces available for hire to production companies for a day, a week, a month or several months depending on the production. But they must be 'multi-purpose' in that 'they serve a variety of sectors including film and television production, advertising' and even still photography.¹⁴⁵ In a deterritorialised industry, the studio complex is intricately bound to its location and related clusters of firms.

Agglomeration is still a feature of this 'deterritorialised' system, partly because production shoot requirements demand certain levels of concentration. But with digitisation and technological developments, the key issue is no longer just geographical proximity but functional proximity – how well 'plugged-in' a location is in terms of both high-speed data transmission links, and transport connections.

The Gold Coast, like the film industry in Vancouver, was able to develop because of its functional proximity to the core of the domestic film and television industry, and to Los Angeles. Places without a substantial local film production infrastructure have been able to compete because technological changes in post-production along with developments in telecommunications and computing permit the offering of services at distance. They are also able to compete because they may concentrate on particular services and therefore not need all the facilities associated with the whole pre-production, production and post-production chain. It is in this respect that we can see how production locations and the services they are able to offer must be 'interoperable' with those in other places, but they may not necessarily be interchangeable with them.

¹⁴¹ Storper (1989), 'The Transition to Flexible Specialisation in the US Film Industry', p. 285.

¹⁴² Aida Hozic (2001), *Hollyworld: Space, Power and Fantasy in the American Economy*, Ithaca: Cornell University Press, pp. 88–89.

¹⁴³ Toby Miller (1998), *Technologies of Truth: Cultural Citizenship and the Popular Media*, Minneapolis: University of Minnesota Press, p. 163.

¹⁴⁴ Mike Gasher (2002), *Hollywood North: The Feature Film Industry in British Columbia*, Vancouver: UBC Press, p. 51.

¹⁴⁵ Scott (2000), *The Cultural Economy of Cities*, pp. 101–102. Advertising generated c.40 per cent of Barrandov Film Studios' turnover in 2000 (Ministry of Culture of the Czech Republic [2001], *Report on the State of Czech Cinematography in 2000*, Mass Media Department, April–May 2001 p. 19). Scott describes the involvement of Paris studios in photographic productions.

As a consequence the contemporary studio complex is a different beast from its predecessor. It is a vehicle for aggregating production elements in circumstances in which production elements have become substantially disaggregated. Earlier film studios were vehicles for aggregating production where production elements were vertically integrated. Now film studios are part of the ensemble of film services offered by particular locations to attract film production, local and international finance and distribution.

This characteristic of the studio complex is not only critical to understanding how it works but also how it relates to other activities in its locality. As a consequence the studio complex has become less important to the Hollywood major and more important to locality-based film and television production activity and those who represent and promote such activity – particularly governments, trade associations and guilds and associations.

'PLUG IN' FILM SERVICES: AGGREGATION AMIDST VERTICAL DISINTEGRATION

As noted earlier, the contemporary studio system is unthinkable without the disaggregation of inputs into the pre-production, production and post-production areas. While the studio complex is a 'one-stop shop' in that it typically brings together under the one roof a variety of businesses, logics of disaggregation mean that these complexes do not typically do all the 'film' or television program in question. The contemporary production logic is a logic of parts and therefore a logic of clustered parts. Studio complexes are, in this sense, modelled as vehicles for organising a range of 'plug-in' services.

This idea and reality of 'plug-in' services have become a general characteristic of the entertainment industry. As Allen Scott describes it:

The entertainment business in general is inclined to vertical disintegration, so that the production of films, television shows, musical recordings and multimedia products breaks down into a multitude of detailed tasks carried out by specialized firms and subcontractors. These specialized producers are brought together in intricate networks of deals, projects, and tie-ins that link them together in ever changing collaborative arrangements and joint ventures.¹⁴⁶

Those contracting and those supplying 'plug-in' services form partnerships. Such partnerships between a localised production services industry and a transnational distribution and financing organisation are asymmetrical. Local providers from crews to film service companies offer 'plug-in' services to international companies. In this sense the contemporary Hollywood 'runaway production system' is but a variation of the already well-developed contracting-out relationships in place.

The vertically disintegrated production system has been fundamental to the development of the contemporary international system. While there is a tendency to foreground 'production processes' and activities, vertical disintegration requires significant and developed capacities of coordination and facilitation and the infrastructures to support these. With productions involving work in several locations, these command and control functions and the supporting infrastructures become more important. It is at this point that the role of production services companies and film commissions or agencies become critical. There has to be in place a highly organised command and control system based on knowledge, relationships, logistical skills and connections to the distribution industry, and a sophisticated communication infrastructure to permit this.

Such vertical disintegration is one of the bases for the increasing proportion of film work undertaken internationally and the development of studio complexes around the world. Opportunities are created for companies to bid for parts of projects. At the same time what may have begun as an isolated service generates 'production clusters' in that location related to that service. So while it would be tempting to think that location no longer matters it still does.

Clearly disintegration sits side by side with the continuing and substantial co-location of film-related businesses which purpose-built studio complexes facilitate. That is, aggregation into production clusters is a feature of vertical disintegration. What we have is less a set of 'it could be anywhere' film production service companies, but clusters of film-related companies situated in particular precincts and larger areas within 50–60 minutes of each other (often connected by high-speed fibre optic cables). What is being

¹⁴⁶ Scott (2000), *The Cultural Economy of Cities*, p. 181.

controlled at a distance by the film's backers is not usually a single supplier but (and this has happened for the convenience of the purchaser of services) a range of film-related services in a particular location or region. Film production can therefore be thought of as being a disaggregated process whereby film services are provided by aggregated bundles of suppliers in particular locations. This gives an inter-locational dynamic to production – a dynamic relation between places, usually the places of 'command and control' and the 'places' of the production cycle.

With international production, ultimate creative and financial control rests with entities located elsewhere. The premium here is placed on the facilitation, coordination and integration function that the studio environment affords. When international productions are spoken of it can sometimes seem that the film or program is wholly produced locally. This is rarely the case. Understanding this dynamic is critical to understanding the contemporary studio system. What is produced in such studio complexes may not be the whole film, but parts of films. Competition among sites is generally for parts of projects: studio sound stages and locations for parts of the shoot, the studio complex or cluster for some production and/or post-production services.

Indeed there are clear limits in any international production system. Only so much of the process can be handled at a distance. The issue is not just one of a technical deficit or a branch office mentality. It is part of how audiovisual projects are developing and the kinds of control systems in place for them. This helps explain why Gary Keir of Atlab on the Gold Coast sees location as the most important single factor limiting the chunk of the overall production process available to locals wherever they are based:

When you have the main players, the investors, remaining overseas, they are not going to come back here. They may want to shoot here for monetary reasons but you still have two years of post-production time where those people will have to go back where they came from to work on other projects as well as finishing *Scooby Doo*. The directors have finished the upfront side of things so they have to be back in the United States working on other projects as well as finishing off and I'm sure the investors would want to have their finger on the pulse as well. After all that is where the money is coming from.¹⁴⁷

Whereas there was a tendency at the start of the 1990s simply to shoot in Australia and complete production back in the US, over the decade more post-production work has become available to local companies. This has partly been a consequence of post-production requirements increasingly impinging on the shoot, muddying the dividing line between production and post-production. But it is also clear that post-production is increasingly being done using video streaming (telestreaming). In this case, the disadvantage of being so far away can be turned into an advantage, as work done overnight American time in Australia is available for the relevant people to see in the morning.

Videostreaming has helped enormously because it does break down that distance barrier. There is still that time difference and sometimes it's a variable. But sometimes it's good because you know you can send a whole lot of stuff and in the morning when they come in, it's there waiting for them. And then [next] morning when you come in, their comments are there waiting for you.¹⁴⁸

Sometimes this can be an intensive process:

We did a pilot for Warner Brothers earlier in the year (2002). We had an incredibly tight schedule and the show had over 200 visual effects shots which were quite complex. Due to the fact that it was a pilot the executives at Warner Brothers wanted creative involvement at every stage, so the whole system of telestreaming had to be efficient to feed them the material so we could get their comments back as quickly as possible. In the end we were delivering completed shots at high resolution via telestreaming. Obviously to telestream something at full resolution might take 8–10 hours, but it is still quicker than hopping on a plane.¹⁴⁹

Obviously plugging into the 'post-shoot' part of the film process requires sophisticated accommodation:

The pilot was shot in Australia with an American director but when the shoot was completed it went back to LA for editing but the visual effects still stayed here. Photon was communicating with the editor and the director. They took one set of hard drives to LA and we kept one set here. They would email us the latest cut at the end of their day, and all the assistant here needed to do was load it into the computer and the edited show would

¹⁴⁷ Gary Keir, Atlab Gold Coast, interview with the authors, 4 September 2001.

¹⁴⁸ Marc Van Buuren, Coote/Hayes Productions, interview with the authors, 23 July 2002.

¹⁴⁹ Marc Van Buuren, Coote/Hayes Productions, interview with the authors, 23 July 2002.

re-conform to the latest version, which would then go to Photon for the visual effects. Then we would have conference calls where they would be sitting in LA and we would be sitting over here and we would be looking at the same edited material.¹⁵⁰

Marc Van Buuren is optimistic that more of the production can be done in Australia than before, and this is creating opportunities in the post-production area. At the same time real issues remain. While there may be '10 Australian editors who could do a job just as well if not better', there is also a perception that critical command and control functions need to be retained in the US, and this will determine to the extent to which a production uses local services, no matter how qualified. Andrew Mason confirms this noting that 'it is very rare that you would get an Aussie editor because if the director is not Australian then they will have formed a relationship with an editor and, on top of that, whoever is financing the film especially if it is a studio will have a list of people they approve of as editors ... [editing] is a black area that they really feel like they need to control'.¹⁵¹

Under this reading, location will continue to place very definite, structural limitations on local film production service companies and personnel in the international production system. While telestreaming, a different time zone, and developed relationships do permit more distributed work than previously, logistical limitations still need to be worked around.

One of the ways disaggregation is controlled is through key US creatives, usually US-domiciled figures. If this can be frustrating it is also likely to continue. The danger we have in thinking about Australian participation in the international industry is two-fold: over-inflating the significance of the domestic contribution; and underestimating the creativity and contribution being made by Australian film services companies. If the former overvalues the Australian contribution, the latter ignores the way the entertainment industry's increasingly disaggregated character is organised around post-industrial creative clusters. What is needed is a realistic and far less ideological perspective on the film services sector.

STUDIO COMPLEXES AS RENTAL SPACES

To understand the logic of the contemporary studio we need to understand how it relates to the production industry and to production processes, particularly its role as a rental facility. Studio complex managers are not only landlords seeking tenancy but service providers seeking to promote the use of their facilities. However, while the facility may be marketed to all comers, the comparatively high cost of renting the complex's sound stages means that many producers operating on lower budgets are likely to use local warehouses because of their lower rental costs.

But while both Fox and Warner Roadshow may have an 'open access' bookings policy, neither is contractually required to ensure that a proportion of production work they service be Australian. The new Central City Studios in Melbourne, on the other hand, is required to do so under the terms of a loan agreement with the state government. While both the Gold Coast and Sydney studios began with assumptions of providing facilities for both international and local production, in neither case did this come to fruition in quite the way intended. But when people claim that studio facilities have been out of reach of local producers they are in fact referring to only part of the 'one-stop shop' – the sound stages – not to the range of services provided from or adjacent to the studio complex. These services are often in demand from local production as well as international, and it is they, rather than the sound stages themselves, that are the success story in terms of the beneficial effects of studios and international production for local producers.

Indeed some of these services – particularly on the Gold Coast – have provided facilities which would not have been available locally if it were not for the existence of the studio complex. For example, Atlab's film processing facility on the Gold Coast is the primary facility for the local film and television production industry. The company's Gary Keir sees Atlab Gold Coast as being important to the growth and professionalisation of Brisbane and Gold Coast-based film production, particularly documentary production. Vic Kasper of Digital Sound and Vision provides sound services to both local and international production. Post-production houses like Cutting Edge, one of whose facilities is located just outside the studio

¹⁵⁰ Marc Van Buuren, Coote/Hayes Productions, interview with the authors, 23 July 2002.

¹⁵¹ Andrew Mason, City Productions, interview with AFC.

complex, mix local and international work. John Cox's Creature Workshop located down the road in Labrador also supplies creatures and robotics to the local film industry – particularly the advertising industry. He would provide animatronics to the local feature film industry if it made fantasy films (which it historically has not). Cameraequip is a supplier of cameras and other equipment for the local and international industry. Producer Chris Brown is also a codirector of a screen acting training school supplying into the Gold Coast and Brisbane markets. And music composer Garry McDonald works on local film and television productions in between his core work on television series and telemovies.

There can be no doubt that the studio complex and the international productions that partially sustain it have been very important to the several businesses which supply both industries. Murray Pope of Animal Logic, a visual effects house working out of Fox Studios, sees much of his own organisation's technical infrastructure as being largely paid for by foreign productions and claims this is more generally the case:

The local infrastructure scene has benefited enormously from foreign productions coming in here, the range of equipment you can get here from lighting to cameras to editing to visual effects and sound has to a large extent been funded by large-scale, US-funded film projects with substantial infrastructure budgets and an expectation that production infrastructure and crews should be as good as anywhere in the world.¹⁵²

But why are the sound stages out of reach for local production? The equation is not simply reducible to cost. It goes to the heart of the business model for the contemporary studio and the contemporary Australian film. Fox and Warner Roadshow make money by renting space both to companies which locate there and provide one-stop shop services, and to producers seeking locations. These complexes have an interest in their tenants getting a constant flow of work and their facilities being in constant demand. They are not 'more interested in international productions' or 'more interested in local productions'; the studios are available for anybody who wants and can afford to use them. At bottom they are interested in keeping their spaces rented to capacity. Above all, like any rental business, they fear the long periods where expensive spaces are idle. Consequently there is a preference for longer rentals: there is less in the way of transaction costs; and not the same need to worry about and 'look for work'.

Big-budget features – like *Scooby Doo* or *Star Wars* – often take up studio space for a number of months. A long-running international television series like *Beastmaster* can take a sound stage and sometimes two for several months; telemovies may take up one, or at most, two stages and then for only between one and three months.¹⁵³ When local feature productions use the studios they generally can only afford a week or two there. The advertising industry might only want to rent studio space for a few days. Apart from the big-budget features most of these productions – telemovies, international TV series, local features and advertisements – require the smaller-sized sheds. It is only features, particularly larger-budgeted features, that require the larger stages for lengthy periods of time.

Studio complexes will always give preference to productions of greater longevity. If this gives local producers a sense that studios are not interested in them it's not because they are local; rather it's because they are short renters of limited amounts of space. In circumstances where the studio part of the film business generates at best limited returns on significant investment, this pressure to secure full rental is all the more significant.

Studios may give preference to productions which utilise the most studio space for the greatest length of time, but they are also interested in *any* arrangements which can fill the space. For this reason, studio complexes will take on television commercial production and low-budget drama production if there is space. As Elle Croxford, former Executive Manager, Locations and International Production with Queensland's Pacific Film and Television Commission has noted:

It's like any business really; rates are negotiable. If the studios have a choice between filling a stage or letting it sit there with nothing in it, of course they are going to negotiate.¹⁵⁴

Local productions would then likely get in, probably at discounted 'spot' rates, simply on the principle that some rent is better than no rent. In these circumstances local work coming into the studio at short notice

¹⁵² Murray Pope, Animal Logic, Fox Studios, interview with Ben Goldsmith, 29 August 2001.

¹⁵³ As Marc Van Buuren puts it, these kinds of shows 'take one sound stage and some storage space, some wardrobe, construction area'. Marc Van Buuren, Coote/Hayes Productions, interview with the authors, 23 July 2002.

¹⁵⁴ Elle Croxford, Pacific Film and Television Commission, interview with the authors, 6 August 2001.

is actually of great interest to the studios. But it is difficult for the studio manager to book short periods—from three days for TVCs to four weeks for low-budget drama production—some time in advance because the complex may not then be able to accommodate productions requiring space for longer periods. Accepting a booking in these circumstances could mean losing a larger client. Advertisers and local filmmakers interested in very limited bookings will find it difficult to plan with certainty. At best there can be pencil bookings where the studio keeps the client updated on projects coming in. Sometimes the cancellation of a major project leads to the complex being opened up for domestic production. This was the case for Fox in 2002/03 when the loss of two major features with pencil bookings created a short-term ‘window of opportunity’ for local producers, including students of the Australian Film, Television and Radio School.

Unless a studio or a region specialises – as Vancouver has in telemovies and international series – the purpose-built complex necessarily operates to a rental pecking order. The big-budget productions are the desirable, premium clients because they tie up so much space for so long, and if the films are successful they generate a buzz about the complex, ‘putting it on the map’, which may attract additional high-budget productions to the facility. With studios finding the blockbuster productions a more attractive rental proposition, other users provide ‘bread and butter work’ that may be useful in keeping ‘the studios ticking over’.

Studios may maintain different rates for domestic and international production. But the Australian studio complexes were not set up to provide services in this two-tiered fashion: they were not seen as critical instruments for domestic production assistance but as instruments for developing skills and capacity and as a means to enlarge Australia’s share of the international production ‘pie’.

REAL AND ILLUSIONIST SPACE: THE STUDIO COMPLEX AS INFRASTRUCTURE AND SERVICE CENTRE

In thinking about the distinctive features of studio complexes and the relations between types of space built or converted for permanent production use – large purpose-built studios, smaller purpose-built studios, warehouses or other large buildings such as aircraft hangers – and similar spaces used for one-off productions, several points must be kept in mind.

First, studio complexes are usually epicentres or hubs of (international) production. Other production facilities may also function in this way, but in much less intense, sustained and organised ways. Second, the purpose-built production facility constructed on a large lot embodies a particular ‘infrastructural’ and ‘illusionist’ way of thinking about films and filming. This thinking can only ever be partly embodied in smaller studios spaces and converted warehouses. And it is not at all present when a production uses a warehouse space or a location and then moves on. Third, the studio complex is by definition made up of sound stages of varying size and expense, thus making possible productive use of various stages and a movement between stages. Fourth, each type of production space has its own particular uses (so facilities are not necessarily in competition with each other), but each is also partly substitutable so that whenever one is not available another can be used instead.

For the international industry studio complexes are a *sine qua non* and are at its epicentre. In Dale Duguid’s words they are the industry’s ‘centre of gravity’. Studio complexes are not always used for international productions, but their presence and that of the associated facilities which cluster around them are critically important in establishing the credibility and reputation of a city or region as a production venue. ‘Studios are seeding infrastructure. You build infrastructure and other things will happen.’¹⁵⁵ The studio complex is not just a facility. It is an infrastructure and a production mindset. But where a production industry is as steeped in the use of natural and urban locations as Australia, it may take time until the centripetal force of a studio complex is fully acknowledged, if not embraced.

For Dale Duguid the value of the purpose built studio complex hinges centrally on the strategy of creating value through the ‘residual infrastructure’ created, enabled or maintained by a feature film or television series. This idea lies at the opposite end of the spectrum from the ‘location’ mindset where you find a space in some ‘old foundry or paddock’, set up, make a movie and then move on. For Duguid the advantage of the studio complex is that it capitalises on residual infrastructure. It has ‘the simple ability of

¹⁵⁵ Dale Duguid, Photon, interview with the authors, 28 August 2001.

being able to leave things standing at no cost penalty'. The 'location' shoot on the other hand rarely creates infrastructure which survives past the final wrap.

The studio complex maintains a residual infrastructure in that:

things stay standing in the sense that a computer network or a back lot or place to park your lighting truck. Studios are happy to continue with renting a truck parking space or to leave that back lot standing because they might be able to use it later on. That ability of being able to leave infrastructure in place rather than destroy it at the end of the shoot – that is what studios are all about.¹⁵⁶

In the studio complex model, Duguid explains, residual infrastructure is *paid for by the films themselves*. This is a model of 'expenditure on infrastructure at the expense of the film' which constitutes the 'form of subsidy in the United States filmmaking paradigm'. So *Titanic* underwrote the Fox Baja development in Mexico and, in creating infrastructure, brought a new region on to the international production horizon.

The Australian studio complexes have less extensively developed models of residual infrastructure than their European or American counterparts:

One production here [Warners] needed a street set so we built one and quite a few productions have used it since. All that is left now is a bit of bitumen road and some curbing but someone will use that. Even adjacent to the studio lot there are sheds and props dedicated to the filmmaking process. Infrastructure is contagious once it reaches critical mass.¹⁵⁷

This idea of residual infrastructure takes many forms, be it recyclable sets, communications or sound stages. Even the size of the backlot – the sheer space they are capable of providing – can be thought of as a residual infrastructure (as Duguid put it 'the first days of *Mission Impossible* we had Tibet out there and Africa').

If residual infrastructure is one critical component of the studio complex mindset, the other is what Dale Duguid has called an 'illusionist' rather than 'literal' approach to filmmaking which can be summarised as an approach which seeks to enhance, amplify, supplement or otherwise create the image/sound environment. It should be no surprise that Duguid develops this view, as it is in synch with the digital blurring of post-production into production. The illusionist mindset, based on the malleability of studio spaces, emphasises making films that are 'set in any time in history or any place in the universe'. It is prepared to create new worlds, as in *Dark City* and *The Matrix*, and fantasy creatures never seen before, as in *Scooby Doo*. It also encourages an active approach to supplementing a location, a landscape and image.

By contrast the literal approach makes do with what is there. Duguid explains this distinction through the example of a hypothetical script that required waves crashing against a cliff with a gothic castle towering above. A literal approach 'would settle for shooting it at North Head'. While an illusionist producer 'would think of the best castle in Prague, the best cliffs in Hawaii and they would assemble it digitally and have the definitive shot'. For Duguid the literal approach is 'humbled and compromised in its realising of screenplays'. It suggests an approach which says 'this is what has been written, this is what has been filmed and people will have to like it'. The illusional approach conversely plays on the malleability of the studio complex. Post-production, special effects and the use of the controlled environment of the sound stage are central to the creative process:

Most Australians assume that because their scripts don't have spaceships in them, they would not need any visual effects. Whereas in truth most American contemporary urban dramas have visual effects in them because it saves them money and gets them the location and look without having to physically go there, build that thing or whatever. It's all about reducing the costs of production. That's a commercial agenda; it is not a sci-fi agenda.¹⁵⁸

The illusional project is fundamentally about enhancing standards of imaging and sound, and remaining competitive in their delivery. While much more is possible in a large, integrated studio complex, an 'illusional' mindset also gives rise to specialised businesses and facilities such as the recently constructed Millennium studios on the Gold Coast for stunt and special effects work. Similar kinds of studio thinking

¹⁵⁶ Dale Duguid, Photon, interview with the authors, 28 August 2001.

¹⁵⁷ Dale Duguid, Photon, interview with the authors, 28 August 2001.

¹⁵⁸ Dale Duguid, Photon, interview with the authors, 28 August 2001.

has spawned the specialised film music stage in Sydney, Studio X, which is predicated on a continuing stream of large-budget international production out of the Fox stages. What is interesting about these developments is that they derive from the presence of a large studio. Unlike previous studio spaces which took the local industry as their horizon line, these studio spaces are predicated on the studio complex as the epicentre of production rather than as an optional production and post-production space.

Historically Australians have worked with smaller, specialised but specially-built studio spaces and with converted warehouse spaces to a realist or naturalist story frame, emphasising 'literal' rather than enhanced locations. While high-impact spectacle and therefore 'illusion' are features of many television commercials, even these needs can be met by smaller, specialised spaces.

This realist rather than illusionist mindset of Australian producers may be as much a consequence of local circumstance and domestic cost structures – the 'practical reality of making things' in Australia before the advent of the Fox and Warner Roadshow Studios – as it is of fundamental orientation. As Murray Pope observes, locally funded filmmakers have 'generally not had access to the kind of budgets it takes to make major spectacles' with the consequence that 'Australian producers tend to shy away from spectacles and we tend not to script them'.¹⁵⁹

Kim Williams, now head of the pay-TV operator Foxtel and at the time head of Fox Studios Sydney, makes the point that studio spaces are 'not suitable for low-budget production' not because the rental of the studio 'costs the money' but because the producer has 'got to build everything'. They have to 'build a room with two walls and without the other two walls so you can shoot it differently'. This means producers have 'tended to go over to someone's office because it's there and doesn't have to be built'.¹⁶⁰

It is our contention that the development of both the Gold Coast and Sydney studio complexes was a precondition for the emergence of the illusionist mindset in Australia. Prior to 1989, purpose-built spaces were built as part of television station complexes, and at Film Australia's studio at Lindfield, but they tended to be located in buildings constructed for other purposes. One such converted space was at Broadmeadows in Melbourne, which Duguid described as a 'purpose-built processing plant turned into a studio'. For Duguid this facility showed the 'benefits of having all the sheds integrated around the office space'. And it certainly had several advantages over spaces abandoned after each film. But Duguid also recalls how those who had worked on the *Mission Impossible* series in the Gold Coast complex and then moved with the series to the Broadmeadows facility experienced at first hand the value of a purpose-built studio complex over its converted warehouse counterpart.

One of the advantages of a studio complex over smaller facilities is that it has a number of sound stages of varying size and therefore expense. This allows producers a variety of options even over the course of a single production, while a number of productions may be at different stages of development at the complex at any one time. Marc Van Buuren describes how this worked for the production of the *Lost World* at Warner Roadshow Studios:

With the last *Lost World* [series], we ended up utilising a smaller sound stage for budget reasons. On the previous season of the show we were less restricted by budget and were able to use a larger sound stage where we could build our main set and still have room to construct smaller sets as and when required. A large number of scenes were shot in the main tree house set and it was imperative that we used a purpose-built sound stage in order to minimise the risk of having to re-record dialogue due to exposure to extraneous noises.¹⁶¹

This flexibility has been critical at different times to both the Gold Coast and Sydney studio complexes.

Sometimes several of these spaces – the studio complex, the specialised studio, the converted warehouse and the location – can be utilised over the course of a single production. At other times they can be in competition with each other in the sense of providing alternative and partially substitutable spaces for the purpose-built studio (this tends to be the case in particular areas such as TV commercials, series, telemovies and local production). Here the studio complex can 'price itself out of the market' for local productions.

¹⁵⁹ Murray Pope, *Animal Logic*, interview with Ben Goldsmith, 29 August 2001.

¹⁶⁰ Kim Williams, Fox Studios Sydney, interview with Ben Goldsmith, 30 August 2001.

¹⁶¹ Marc Van Buuren, Coote/Hayes Productions, interview with the authors, 23 July 2002.

Mostly, however, these spaces exist in a complementary and mutually supporting relationship. Indeed the purpose-built complex often generates the development of additional studio spaces – as in Vancouver, Prague and Montreal – although these additional spaces are more likely to be smaller specialised studio facilities. There are several examples of this. One is the development of proposals for studios in Brisbane, the Gold Coast, Sydney and Melbourne, based on the premise that Fox and Warner Roadshow sound stages are largely taken over for ‘mega-productions’, thereby squeezing out telemovies and international series. For Van Buuren these spaces do not have ‘to be as grand as Warner Brothers’: they can ‘be a little humbler ... purpose-built but without all the other ancillary things hanging off [them]’.¹⁶²

Another way these ‘second-order’ studio spaces are used is in circumstances where the complex’s sound stages have been rented out but a production still wants to use the other facilities on the site. In general this is not an optimal arrangement, as Elle Croxford indicates:

When projects are based out of Brisbane we have no studio, so if they are looking for that city/urban look we have to then find as many warehouse options as possible, where there are no blackouts or noise problems. Is there enough parking? Is there enough production office space? Will wardrobe have to be two doors down the street? All those things come into play, whereas purpose-built studios have all these things factored in, in the initial planning process.¹⁶³

It is clear that there is a continuum of production in various spaces across both the local and international industries. But what is equally clear is that there is a fundamental difference between the ‘logic’ of local production, which tends only to include the studio complex at the highest levels of production budget, and the ‘logic’ of international production, for which the studio facility is a *sine qua non* of its existence.

As we have seen, these two logics involve quite different priorities and, as a consequence, different mindsets for thinking about production and its relation to studio complexes. Something of this difference is gestured to by Dale Duguid:

What was obvious to me ... was that [my] notions of what the centre of gravity was for the film industry were wrong. The centre of gravity I had assumed was that because Sydney was a more film-culturally sophisticated place, most people who work in film gravitate there, and so it was all to do with the good places to live and network and have coffee, i.e., a critical mass of people can spawn an industry and vice versa. What I learnt was that the centre of gravity was studios, for pure production efficiency as the engine that drives that. You build a studio in what seemed an odd place at the time [the Gold Coast] and you get a film industry there.¹⁶⁴

The studios are epicentres not just for the film and television production carried out on the premises but also for a range of productions and facilities which their existence spawns. Productions need not actually use the sound stages or even the facilities on site, but may rely on the facilities clustered around the studio complex. It is this relationship with the studio complex which Duguid is gesturing to when he talks of the importance of the studio as a generator of a functional film milieu.

PRODUCTION LIAISON FUNCTIONS: ORGANISING THE COMPETITION OUTSIDE NOT INSIDE

For their business model to work the larger purpose-built studio spaces require a ‘first-stop’ production liaison function which can coordinate, facilitate and market the ‘ensemble’ of film production services in a particular region or nation. Just as the large purpose-built studio provides a valuable service for the industry, the scale of its investment requires a comparable investment in marketing and liaison functions to make the ‘plug-in’ services work smoothly and efficiently.

To be successful, the film studio requires a great many agents, particularly governmental agents, to become ‘film industry minded’. This critical liaison function takes a number of forms. It might include the ‘regularisation’ of immigration and union agreements for key personnel (and also stabilisation of tax agreements) to create a predictable environment for getting people in and out in a timely fashion and without objection. This is a Commonwealth responsibility. It also requires the development of skilled intermediaries, localising the international service – and this is where local and state governments come in.

¹⁶² Marc Van Buuren, Coote/Hayes Productions, interview with the authors, 23 July 2002.

¹⁶³ Elle Croxford, Pacific Film and Television Commission, interview with the authors, 6 August 2001.

¹⁶⁴ Dale Duguid, Photon, interview with the authors, 28 August 2001.

Municipal authorities in particular can work at a local level on creating a climate conducive to production – for example, proactively evolving a plan for the use of the Gold Coast complex’s backlot to ensure that activity there is not subject to complaint.

As the production process became broken down and specified into component parts, a marketplace emerged in which various consortia bid for the production shoot. It started in the US, with Hollywood becoming increasingly receptive to bids from other regions for shooting in their locations, using their facilities and, principally, their below-the-line workers. Over time a network of film commissions appeared within the US geared to getting ‘Hollywood to come to town’. As Miller et al note, by 2000 there were 205 publicly funded US film and television commissions, representing a ‘major subsidy’ to production.

[T]he New York City Office of Film, Theatre and Broadcasting offers exemption from sales tax on all production consumables, rentals and purchases. The Minnesota Film Board has a ‘Minnesota Film Jobs Fund’ that gives a 5 per cent rebate on wages not to mention paying producers’ first-class airfares and providing free accommodation for them and tax-free accommodation for their workers, as well as tax-avoidance schemes. The California Film Commission reimburses public personnel costs and permit and equipment fees. Hotel and sales tax rebates are almost universal across the country, and such services even extend in some cases to constructing studio sites, as in North Carolina.¹⁶⁵

In time government film agencies involved in promoting their jurisdiction as a filmmaking location expanded to other regions of the world which were already managing a regular slate of productions – notably British Columbia in the 1980s, Queensland in the early 1990s and the rest of the world now.

When the Gold Coast hosted the annual Film Commissions Conference in September 2002 it was the first time the meeting had been held outside North America. This event brings together the mostly US film commissions (municipal and state), as well as those from Canada and more lately other jurisdictions. Bringing the conference to Australia was regarded as quite a coup by the Gold Coast City Council, the Pacific Film and Television Commission (PFTC) and members of the local film community. It showed the extent to which Australia had become regarded as another ‘location’ in a network of locations bidding for productions to be shot in their jurisdiction.

As Mike Gasher notes, an individual film commission (in his case he was thinking of the British Columbia Film Commission):

competes with about 250 rival jurisdictions to attract a share of ... production. These competing jurisdictions include all of the provinces and territories in Canada, American states such as New York, Florida, North Carolina, Texas and Illinois and countries such as Australia, Great Britain, Ireland, Luxembourg, the Bahamas, Jamaica and Poland.¹⁶⁶

When it comes to bidding for a production, particular locations are in effect bidding in the same market, with location decisions coming down to a variety of factors – sometimes cost relations and therefore exchange rates, cold and warmth, personnel, accessibility of locations and production services, the preferences of key creatives, the functional proximity of a studio complex’s management to key decision makers and so on. (On this last point the Los Angeles location of Michael Lake, the head of Warner Roadshow Studios, enables him to be ‘on the ground’ pitching for productions in Los Angeles and to be accessible in Los Angeles while Gold Coast-based productions are in process.)

The result has been the development of a growing and complex screen production pitching market. It is not just a market for features, telemovies, and television series but also a market for television commercials and music video; and it is not just a market for Hollywood runaway production but also for productions sourced from elsewhere in the global system.

In a real way AusFilm and the various (Australian) state offices bidding for production have as their effective competitors the various state and city film commissions in the US, Canada, the UK and so on, as well as their Australian counterparts. With its emerging collection of agencies dedicated to securing production, Australia is now able to effectively participate in the bidding for international productions. Furthermore, its organisations are modelled along the lines of the various state film commissions in the US

¹⁶⁵ Toby Miller, Nitin Govil, John McMurria and Richard Maxwell (2001), *Global Hollywood*, London: BFI, p. 10.

¹⁶⁶ Mike Gasher (2002), *Hollywood North: The Feature Film Industry in British Columbia*, Vancouver: UBC Press, p. 107.

and Canada. This move (which is also an example of learning by example) is leading the film industry to organise its thinking about production in more systematic ways and increasingly to resemble the North American system.

Because the market for location shooting has become so organised, these commissions have become very important agencies in the international film production business. They become important 'first-stop' shops and they play a role of facilitating the bringing together of a variety of different elements in the production industry in developing the pitch. The film commissions are, in principle, interested in attracting all kinds of production, and out of many bids only a handful produce results. Elle Croxford:

If we do a hundred presentations, probably one in 25 would move into the next stage. i.e. a scout, and then one in four scouts would turn into a secured project. But we are firm believers that you have to be in it to win it. And you have to be actively marketing yourself and promote what you have here.¹⁶⁷

At the time of our interview in mid-2001 Elle Croxford indicated that the PFTC had been pitching on many Indian productions (indeed India was regarded as an emerging market). She added that pitching to the Japanese and the Koreans tended to be in the television commercial area, with the latter being described as 'rather important for us in terms of TVCS' (business from both had been affected by their respective economic downturns).

The pitch involves reading and interpreting scripts. It can involve demonstrating how particular problems – such as the requirements to shoot snow – can be overcome: 'we can create snow digitally, and use potato flakes and nappy liners'. It can stand or fall on differing interpretations.

Sometimes they come and you show them what you consider is the perfect vista and they go 'no that's not working for me'. It really depends on how flexible they are in interpreting the script. One person reading the script may have totally different ideas to another and you can do as much research as you like, and try and double pitches perfectly, but if the director has an idea in their mind ... It is pretty hard work, [but] it is good when it does come together.¹⁶⁸

The job of liaison and marketing is not simply the province of the state 'film commission'. The various local government authorities build up competencies in film shoots as 'regions' become proactive in their dealings with the film production industry. The on-the-ground support that local governments in particular can provide is critical. It is often local government that needs to take an active role in educating the public – its rate payer base – on the importance to the city and surrounding region of film production shoots and in using its connection with newspapers to encourage film-friendly stories.

The Gold Coast City Council, for instance, has an ongoing resident and journalist information campaign to educate and inform the public of the benefits to be had from having film production in their communities. It also has a communication strategy directed towards the film community to make it aware of procedures, processes and protocols, and where to go for information and help. Further, the Gold Coast and Brisbane City Councils have led a 'regional development' strategy involving local government areas in South-east Queensland, with the aim of making protocols and procedures consistent across the region. A production could thus move seamlessly across several local government jurisdictions in South-east Queensland, making the location manager's work easier and providing greater certainty in production. Similar arrangements, but this time at a state level, have been developed out of Film Victoria.

What is being built at a local and state government level here is a climate conducive to film. For the Gold Coast City Council this involves fast-tracking permits, not charging for locations, and viewing their role in assisting production not as a profit centre for the council but for businesses in the area (for council it is almost a loss and a burden – to be made up by taxes and growth in the region). Having *The Gold Coast Bulletin's* 'onside' is regarded as a crucial ingredient in maintaining local support and ensuring trouble-free shoots.

Perhaps the Gold Coast City Council has taken this support function the most seriously of any local or state authority. It has done this for a number of reasons. Firstly the GCCC is all too aware that the 'economic' base of the Gold Coast depends on external consumer and investor decisions; it needs to be 'friendly' to

¹⁶⁷ Elle Croxford, Pacific Film and Television Commission, interview with the authors, 6 August 2001.

¹⁶⁸ Elle Croxford, Pacific Film and Television Commission, interview with the authors, 6 August 2001.

the tourism and entertainment industries and to developers with big pockets (the latter is a pragmatic response to the Gold Coast's continuous need for restless reconstruction to remain a competitive national and international entertainment and leisure 'capital'). The film industry, not surprisingly, has become critical to the rebuilding and rebranding of the Gold Coast and its 'place' marketing.

Characteristically production occurs in places which are conscious of and engage quite explicitly in various kinds of place marketing, and for which the 'memory' of previous productions becomes important. Just as Montreal promotes its film production capacity and the Hollywood features made there in the publications to be found in the city's hotel rooms, so too do both Sydney and the Gold Coast make much of their respective 'archives of production'. Over time the 'film memory' of a place is built up as 'locations' become more regularised, 'more databased', and used to represent different places.

Because the aim of these places is to get more and more of the production – become more and more a one-stop shop – it is imperative that a comprehensive stock of locations is created. It is also important to 'build' appropriate locations – the Gold Coast City Council, for example, is exploring the idea of 'landscaping' public spaces to ensure a film-friendly look, and is seeking suggestions from the production community about what additional features are 'needed' on the Gold Coast to enhance its attraction to filmmakers.

The various film commissions and those who work on marketing places for production make important contributions to the success of a studio complex. By the same token, the studio complex can be critical to the marketing of a place.

CONCLUSION

The studio complex needs to be understood not as a stand-alone entity but as infrastructure around which various networks, including liaison networks, are able to be mobilised. This means that the marketing of the complex and the region, when combined with the strength and depth of film services provision, is much more critical than the day-to-day management of the studio complex.

The difference is perhaps most dramatically demonstrated in the case of Warner Roadshow Studios, where its head is domiciled in Los Angeles. Michael Lakes' location in the 'design' and 'command and control centre' of the international production industry is in this sense one of the critical planks undergirding Warner Roadshow Studios, as too have been the PFTC and the various intermediaries who bring work to the complex.

This example suggests that the real skill in a studio complex lies in the capacity of its management to insert the complex into existing filmmaking networks – and to create effective liaison networks not just for the complex itself but for the location in which the complex is situated. It might be speculated that this facilities marketing orientation required a Los Angeles base in the case of the Gold Coast, but such a base was not necessary for Sydney and Melbourne given their status as substantial production epicentres in their own right.

Chapter 5

Parallel and converging industries: Studios and the local and the international film industries

In Australia we have tended to compartmentalise studio complexes. Industry discussions placed them as having relevance almost exclusively for the international as opposed to the local industry. They have predominantly been seen as vehicles to make competitive bids for runaway productions and for Australia to 'grab its share' of the 'footloose' international productions on offer. Occasionally studios have been seen as a vehicle for high-budget local productions – such as *Moulin Rouge* and *Dark City*. But even these productions are substantially international in their financing, scope, execution, production and post-production.

There have been several reasons for this. Most importantly the Gold Coast and Sydney complexes were established, like their counterparts in Vancouver and Ireland, with the explicit purpose of *commercial sustainability* through attracting a mix of international production and local production. While both Australian enterprises had significant expectations of connection with local production, domestic circumstances including static production budgets over the 1990s militated against extensive local involvement in and use of these studios of the kind initially envisaged for them. When coupled with the priority of these complexes to rent their sound stages, this has had the result that both complexes have evolved primarily as providers of film services to international productions.

Several circumstances limited local involvement in these studio complexes. The studio complexes have been too expensive for the budgets available for making Australian film and television programs over the decade – indeed while local production budgets have remained static, budgets for international, mostly Hollywood, production have significantly increased.¹⁶⁹ So for the 'average' Australian film and television production the sound stages of Warner Roadshow and Fox Studios have been out of reach. If a studio space was needed it made more sense to go to second-order, lower-cost spaces. Rents have worked to institute a two-tier model where international productions use high-end studio facilities while local productions make do with locations, warehouses and smaller studio spaces. One consequence of this is that many local filmmakers have not had the opportunity to make their local films or television programs in 'state of the art' studio spaces.

There are also historical reasons for studios not being part of the mindset of local producers since the Second World War. Local conditions favoured *location-based* production for film, and *studio-based* production for television series and serials, which typically require smaller sound stages. Location filmmaking was where higher image standards, higher budgets per unit of screen time, artisan organisation, and one-off productions – feature films, telemovies, mini-series and documentary production – were to be found. Until the advent of the Gold Coast and later the Sydney complexes, studios, by contrast, were synonymous with lower image standards, lower budgets and industrial organisation, in long-running series, serial and infotainment television programming.

One consequence has been that studio-based competencies specifically for feature filmmaking and higher-budget television have not been as highly developed compared to the substantial competencies in location-based production. These circumstances and their accompanying mindsets, based as they were on opportunities available within Australia, shaped the business models of Australian film and television production and studio development in ways which necessarily limited the kind of place studio production could occupy on local production horizons. With locations not studios being the valued currency, and with local experience centring on the limited possibilities of converted warehouses rather than purpose-built studio spaces, local filmmaking was not, Dale Duguid contends, as mindful of the creative possibilities of studio production as it might have been.

Compounding a sense of separate local and international industries was the fact that both Warner Roadshow and Fox studios were set up away from established film and television production precincts or

¹⁶⁹ See Toby Miller, Nitin Govil, John McMurria and Richard Maxwell (2001), *Global Hollywood*, London: BFI, p. 7.

clusters. This accentuated, at least initially, the sense of disconnection between international and local production. Sydney's film and television precinct is clustered close to the advertising and marketing epicentre of North Sydney, the television stations and multimedia industry of St Leonards, Crows Nest and North Ryde, the Australian Film, Television and Radio School, and the Film Australia facilities at Lindfield.¹⁷⁰ The Sydney studios are close to the Sydney Cricket Ground and Randwick Racecourse – and, of course, the National Institute of Dramatic Art. (With the opening of various road tunnels associated with the Sydney Olympics in 2000 this area is now much closer to the northern suburbs than previously.) The studios have expanded its geographic reach to a new southern edge – likely to be extended even further with the development of the Serenity Cove Studio and business park.

More dramatically the 'greenfields' Gold Coast development was not only separated by hundreds – indeed thousands – of kilometres from the centres of Australian film and television production from where it drew a significant component of its crew, but was also some 80 kilometres from the small local industry centred on Brisbane. These geographical separations could all too easily feed into perceptions of separate spaces for separate industries. In the case of Brisbane and the Gold Coast, city rivalries and very different orientations of their respective city councils exacerbated these differences.

But even here the interdependence of the two sectors has clearly been in evidence. The Gold Coast studio complex although geographically separate from the epicentre of local film and television production in Sydney and Melbourne has been successful in part because of its capacity to tap into this epicentre (indeed the Gold Coast productions often bypassed Brisbane intermediaries in their crewing of productions).

Both the Fox and Warner Roadshow studio complexes are unthinkable without the domestic film and television industries centred in Sydney and to a lesser extent Melbourne. For the Fox complex this industry was in the same city, while for the Gold Coast it was in functional proximity to Sydney and Melbourne in that personnel could easily fly-in and re-locate for the period of production. Such functional proximity is a feature of the Australian film and television production ecology. As Elle Croxford puts it:

The Eastern seaboard is unique in that cast and crew tends to migrate and it is purely work-driven. If you have someone who wants to work on a *Star Wars* movie they will go from Melbourne to Sydney to get that credit. The same thing can be said of domestic production [like] Bruce Beresford's production *Paradise Road* – people tried to get onto that movie because you are working with a great director.¹⁷¹

Such functional proximity has played an important and under-recognised part in Australian production (and can be traced to the location base of much Australian feature production). While Gold Coast-based productions have tended to require more interstate 'fly-in' film workers (indeed the Gold Coast is well set up for this through its tourist industry connections)¹⁷² than do either Sydney or Melbourne productions, there is a growing traffic the other way as Gold Coast and Brisbane-based film workers specialised in, for instance, telemovie and international series production also travel to work in Sydney and Melbourne on such series.¹⁷³ Functional proximity also enables specialised film workers to choose productions in ways they would not if they were tied to place.

Once crew start moving to the upper echelons, to heads of department, they have the luxury of choosing what project they want to work on. It could be a choice of whether to work on a \$14 million production or a \$4 million production or it may be a telemovie versus a feature. 'Oh, I want to stay in features so I'll take the feature.' Again it is down to personal agendas. A lot of people prefer to work on the smaller-budget Australian feature than, say, work on the *Beastmaster* series.¹⁷⁴

¹⁷⁰ National Office of the Information Economy and DCITA (2002), *Creative Industries Cluster Study: Stage One Report* Canberra: DCITA, p. 56.

¹⁷¹ Elle Croxford, Pacific Film and Television Commission, interview with the authors, 6 August 2001.

¹⁷² The logic of functional proximity has meant that the Gold Coast industry has benefited film production and film production businesses in Sydney and Melbourne to a very significant degree – a fact conveniently ignored by 'state-boosterist' logic in NSW and Victoria about 'jobs lost to Queensland'. With such significant numbers of 'temporary locatees' to the Gold Coast it is to NSW and Victorian individuals and firms that much of the production spend goes.

¹⁷³ Queensland-based crew recently flew to Melbourne as part of a Coote/Hayes telemovie production. Crew go to where the work is, and consistent work encouraged a number of people to relocate to the Gold Coast because they were working so much there.

¹⁷⁴ Elle Croxford, Pacific Film and Television Commission, interview with the authors, 6 August 2001.

As we noted earlier, initial (and continuing) governmental support for studios is as likely to be sourced outside as inside film-related portfolios and planning strategies. As a result there have been several intersecting justifications for support for studio complexes, which do not always prioritise their relationship to and benefit for a local production industry. Instead the focus is as likely to have been on other purposes and benefits.

These purposes might include the complex's relationship to establishing high technology computing and information technology infrastructures (an argument used for the Docklands development in Melbourne, and in the early 1990s for the Gold Coast as part of Queensland's 'multifunction polis' thinking). Studios become nodal points in a broader creative industries strategy (the DCITA and Gold Coast City Council position). They have been major signature projects of government (Fox for the Commonwealth and NSW, and Warner Roadshow for Queensland). They have become important as 'branded' developments for a city or a region, underwriting particular regional priorities, from Sydney's 'global city' claim to the Gold Coast's reputation as a 'leisure and entertainment' centre. And they are promoted for their significance to employment generation in a state, region or city (always the priority for the Queensland government and the Gold Coast City Council but now also a priority in Sydney, Melbourne and elsewhere). These diverse rationales for studio developments have given them a particular character in Australia.

Notably these several 'interests' in film production are not those familiar from Commonwealth film policy which traditionally has stressed film's role in culture- and identity-formation, permitting Australians to 'dream our own dreams and tell our own stories'. The result has been an inevitable messiness surrounding studios and their relation to long-standing film policy trajectories. There is not only a certain amount of dissonance among the diverse rationales promoting studio developments but there is also some dissonance with the cultural policy rationales of film development.

The Gold Coast studio complex development was extraordinary to public and film community understandings of the Australian film and television industry. While the Fox development was explicitly figured to bring together local and international industries, it has also been treated as a similarly disconnected development in some press and industry discussions. This is because, almost in spite of their intention to bring together in one space local and international production – remember that both the Gold Coast and Fox complexes had this ambition as part of their initial business plans – both complexes have been rather more shaped by international rather than local production needs. While the reasons for this lie outside studio developments in the budgets and incentive structures for investment in local films, the largely 'international' face of both complexes has encouraged perceptions of international and local production as parallel rather than converging industries. One consequence has been that their relationship to the local production industry has not always been specified in empirical studies or sought by industry bodies, lobbies and governmental agencies.

As new developments receiving government assistance, there was a perception that support for the complexes would negatively impact on local production. This feeling was well documented in Queensland by Susan Ward in her study of filmmaking in that state, where the existing film support was limited.¹⁷⁵ In NSW and Victoria perceptions that supporting studios would diminish existing mechanisms of film production assistance were encouraged by the initial practice of handling the two 'industries' in separate agencies, and the tendency to treat studios as separate initiatives by film policy makers, commentators and politicians. The Queensland government in the early 1990s ran its studio-related 'international productions' initiatives out of the Pacific Film and Television Commission while its local production initiatives were run out of the Queensland Film Corporation.¹⁷⁶ In NSW, the respective agencies have been the Department of State Development and the NSW Film and Television Office, while in Victoria, Multimedia Victoria and Cinemedia have played similar roles. This perception of 'difference' was compounded in Queensland by the Brisbane base of the domestic industry and the Gold Coast-base of the international industry.

With the development of the Fox facility, studio complexes moved from regional anomaly to a national developmental priority. However, while Fox brought national cultural policy attention to the studio system, it is fair to say that this (last minute) centrepiece of Creative Nation was not specifically connected with or made to fit existing policy instruments of government – the Film Finance Corporation, the Australian Film

¹⁷⁵ Susan Ward (2000), 'Peripheral Vision: Understanding Australian Cinema from a Queensland Perspective', PhD, School of Film, Media and Cultural Studies, Griffith University.

¹⁷⁶ See Susan Ward (2000), 'Peripheral Vision'.

Commission and the training institutions, AFTRS/NIDA. This partial disconnection, when coupled with the use of studios once they were developed for offshore production rather more than the local production also initially envisaged for them, encouraged perceptions of dual tracks of governmental and community support. This in turn created the impression that there was support for an international industry based on runaway productions on the one hand and support for a (lower-budgeted) local production capacity on the other hand.

Several interlocking conditions were thus at work ensuring that Australia's domestic production orientation was 'out of kilter' with the thinking driving these studio developments. As noted above there was the domestic industry's lack of capacity to access high-end studio facilities. There was a business model of commercial sustainability for these studios which could not take local productions centrally into account. There were uneven competencies in using and imagining productions within such facilities in an industry privileging inventiveness in location production over studio design and construction. And there was the location of the complexes outside filmmaking precincts and outside existing 'film policy' frameworks. These several factors worked to ensure that the Gold Coast and later the Sydney studios were separate from rather than part of the horizon line and business models of the domestic film and television production industry.

In these circumstances it is not surprising that local and international production became conceptualised in Australia in the 1990s as parallel industries. On the one hand were the high-end studios for the top end of town and big-budget, predominantly international productions. On the other hand were the existing location-based, converted warehouse and smaller studio spaces for the vast bulk of the domestically-situated local production industry struggling with static budgets and (in the drama area) with contracting domestic license fees for production. While the gap between the international and local industries has substantially narrowed over the 1990s – not least because of the common labour pool for each, the growing familiarity of cast and crew on studio productions and the requirements of the 'post-production' revolution for more extensive use of studio spaces¹⁷⁷ – the legacy of these differences still shapes our thinking on studios and their relationship to the local industry.

THE STUDIO COMPLEX AS AN ACTIVE LINK FOR CONVERGENCE OF INTERNATIONAL AND LOCAL PRODUCTION

But this structural separation in which studios are in only one camp – the bigger-budget international production camp – would not make sense to an Italian, German or Briton. They have tended to think of their studio complexes as vehicles for both local *and* international production. What is particularly evident from our international case studies is that, apart from areas in Canada and Ireland where we find some of the same industry separations in place, studio complexes are considered able to combine and leverage local and international production to mutual advantage. They seek convergence as a matter of principle and priority.

Indeed it is more usual for studio complexes internationally – particularly for those at the centre of their respective production industries – to be sites of a combination of international and domestically oriented production. Such complexes typically deal with the full range and scale of domestic production, from infotainment production before audiences¹⁷⁸ to television drama series to feature films. They are vehicles for securing active synergies between local and international productions.

While Barrandov and Babelsberg clearly looked to international production to fill in for a local production industry undergoing restructuring and out of a need to modernise and upgrade facilities after the fall of Communist regimes, the international industry, for its part, was also attracted to the facilities because of the resources that had been created to service domestic production. Similarly in Italy, one of the reasons Martin Scorsese shot *Gangs of New York* at Cinecittà was the availability of a set created for an Italian-language film which could easily be modified (one of that complex's specialties). Another reason was the opportunity to work on the same sound stage which hosted many of Federico Fellini's productions.

¹⁷⁷ See Australian Film Commission, *Foreign Film and Television Drama Production in Australia: A Research Report* Sydney: AFC, June 2002; and PMSEIC (2000), *Innovation in the Australian Film Industry*, Canberra: Department of Industry, Science and Resources, Occasional Paper no. 4, available online at <http://www.dest.gov.au/science/pmseic/documents/Film.pdf>, accessed 22 May 2003.

¹⁷⁸ Cinecittà advertises its capacity to stage such shows as a key feature, while Fox performs similar functions.

As we have seen throughout this study the contemporary international studio complex is unavoidably a vehicle for linking local and international industries. Sometimes the links are made explicit in policy, in industry commentary and self-understandings, and in business models. Equally they can remain informal, buried and uncommented upon. Sometimes linking the two is a matter of active policy. Sometimes it is part of the very identity of the studio such that the facility is unthinkable without it – epicentre studios like Cinecittà, Babelsberg, Pinewood and Shepperton are like that because the health of the local industry is to some extent synonymous with the health of the studio. Sometimes, as in Australia, the connections are made through a common labour pool (film crew) and film services (equipment hire, laboratories, post production, set builders and carpenters). Sometimes the two ‘industries’ sit happily adjacent to each other; sometimes they are indifferent and even antagonistic to each other; at other times they seem to exist in a synergistic and complementary relationship.

Australia’s near-exclusive identification of high-end studio complexes in relation to international production has tended to obscure the many instances of and opportunities for convergence. Increasingly the line between the two industries is blurring as the studios become bedded down and part of an emerging ecology of film and television production. As the Australian Film Commission’s 2002 study *Foreign Film and Television Drama Production in Australia: A Research Report*¹⁷⁹ shows, crew who also work on domestic productions are now gaining experience of studio-based productions in the context of the staples of runaway production – blockbuster features, medium-budget features, telemovies, television series productions. As it becomes an everyday reality for crew to move seamlessly between local and international productions, the gap between the two industries narrows and a sense of their interdependence grows.

The principals of emerging domestic production companies are as likely to have gained film industry experience through working at some time on international production as they are on local productions. Post-production companies now routinely work on local and international production simultaneously. There is a growing body of Australian film workers experienced in and knowledgeable about different aspects of international production process and protocols, and there is a growing cross-fertilisation between domestically conceived and internationally generated projects. As the AFC study makes clear, for every person who experiences international productions as a ‘sausage factory’ in which they are ‘Mexicans with mobiles’ there are those who appreciate it for the opportunity it has provided to hone their skills and to gain creative opportunities not possible in local production.

Whatever the situation, studio complexes always structure a relationship between international and local production. This is because connecting with the international industry and ‘runaway’ production means connecting with a location and its film infrastructure. It is always about tapping into local resources, local production capacity and local developments which are unavoidably and inescapably connected with the trajectories of the local industry. Even the Gold Coast complex with its progressively explicit international orientation has relied on the size and depth of the Australian film and television production industry with many of its prominent locals relocating from Sydney and Melbourne to the Gold Coast after lengthy spells in the Gold Coast as fly-in and fly-out filmmakers.

While the two industries in Australia are becoming more convergent and studios are being seen as part of the ecology of film and television production in Australia, there nonetheless will remain a significant parallel quality to the relationship between local and international production. This is because international productions and co-productions, those who work on them, and the studio complexes which host them, are part of a larger international industry headquartered in another larger regional agglomeration and film market. The domestic production milieu on the other hand, producing as it does film and television for both local and international markets, starts its internationalisation from within Australia and will always contain a component of domestically oriented production. This means that at any given time studio complexes are one of the sites for the organisation of the relationship between simultaneously parallel and converging industries.

As a consequence positive attention needs to be paid not only to those areas where the local and international industries are brought into substantial alignment through productions like *Moulin Rouge*, *Dark City* or *Oscar and Lucinda* produced out of the Fox Studios; but also to those areas where the relationship

¹⁷⁹ Australian Film Commission, *Foreign Film and Television Drama Production in Australia: A Research Report* Sydney: AFC, June 2002.

between the two industries will continue in parallel, as in the production of telemovies, international blockbuster movies like *Scooby Doo*, *Ghost Ship* or *The Matrix* or international television series on the one hand and domestically oriented television series and feature films on the other. Where there is a substantial parallel relationship convergence must be sought on more indirect terms and must become based on synergies between them. That is to say, we need a policy for 'convergence' which accepts the reality of a substantial parallelism while simultaneously seeking points of genuine convergence. And there are examples of such convergence, for instance, in the ways domestic variety shows made for Foxtel pay TV services on the Fox lot sit side by side with high-budget blockbuster productions.

The links between the local and international industries are not simply a common labour pool, or the links among firms that provide services to each industry, or the 'shared' geography of urban space, the common and interlocking networks. They are also a consequence of kinds and styles of 'productions' and the spaces these productions afford. The diverse production work of the studio creates varied opportunities for cast and crew in both above and below the line activities. The long-running television series creates post-production and music opportunities not available to the big-budget feature. The contemporary circumstances of a film milieu combining studios and local and international components are driving consideration of frameworks which might permit the better coordination of local and international production.

TOWARDS A FILM SERVICES FRAMEWORK

Studios simultaneously help establish parallel industries, generate connections and synergies between them, and create a new 'policy' problem. This is the need to come to terms with the presence of the studio complexes as part of a filmmaking ecology, and to enable convergent, productive relations between the international and domestic industries.

An emerging way in which policy makers and the film community are thinking about this problem is to see support for studio infrastructure as adding and promoting a 'film services' approach to film policy and production support. In film services frameworks the thinking centres not so much on an individual production as on the various inputs to that production. The concern is for the sustainability, skills-development, creativity and growth potential within each input. Such thinking is friendly to the increasingly disaggregated character of film production.

A film services framework manifests itself in several ways. First, there is a tendency to conceive of 'inputs' as clusters of related small to medium-sized businesses requiring coordination and connection. This is an interest in a 'post-industrial' workforce made up of contractors and small businesses providing film-related services. Second, there is a concomitant trend to think of these 'inputs' as having their own trajectories and opportunities. This is leading to a partial disconnection and allowance that there might be a mismatch between sectors, with different speeds of development, different opportunities of the different clusters making up the film industry.

Third, there is a focus on 'content streaming' opportunities rather than on a film product per se. This entails a focus on film-related audiovisual services being provided for a variety of formats ranging from film and television programming, advertising and music video clips, to computer games, DVD applications, webcasting and product for online sites of museums, galleries, companies, audiovisual screens in public spaces and events. Some of this is an inevitable response to the opportunities created by convergence.

The policy interest is in taking advantage of film-related opportunities emerging in a changing audiovisual environment – acknowledging that these environments require complex and carefully tailored policy responses. This is an acknowledgment of the different opportunities available to sectors and the need to be oriented not toward the 'whole film' but to be alive to the piecemeal involved in producing for several different formats.

It allows for the recognition, for instance, of the creativity and strength of Australia's post-production services industry, which might otherwise go without significant acknowledgment were the focus to be on the individual production and consequently on its content, director, writer, producer and actors. It also allows the various Australian inputs into Hollywood production to be recognised as creative inputs, and vice versa. And it permits recognition of the important role that various film services institutions play in growing and managing the industry, such that the concern is very much for the health, existence and extent of facilities, capacities, and technological competitiveness.

Policy and industry attention turn towards creating the right settings, including incentives for film services companies to prosper. This attention considers the health, character and skills development of the film services themselves irrespective of whether these skills and technologies are exercised in local or international productions. A film services perspective implies the need to continue to service identifiably different 'market segments' or niches and therefore focuses attention on (1) where gaps exist; (2) the ways such services can productively supply both international and local production; and (3) how supplying for these different market segments might be better facilitated through connections between the different production sectors.

This has brought with it a healthy move beyond the alternative of supporting either a local or an international industry and encouraged seeing both on a continuum. This policy attention has benefited our thinking about the connection between local and international productions in that the aim is not the impossible one of unifying the two (which would only make one subservient to the other), or even to accentuate their common points of connection (which vary significantly from production to production, format to format), so much as to simply support the continuing evolving and dynamic character of each in ways which grow the film services community of which both are integral parts.

This entails a shift in thinking about the relationship between these two industries to see the international industry as being attracted to and involved with a particular region because of the state and character of the local industry and the professionalism of the services, including support services, that are provided. The international industry is interested in making films and television in Australia because of the state, nature, character and creativity of the local industry, which may have been principally but not exclusively developed in local productions but now has an international component to it.

The international industry on the Gold Coast provides an instance of experience gained as much in international production as local production. This means that the state of international interest is partly dependent on the existing local industry and that there is as a consequence a much more dynamic relationship between the two industries than is generally credited. And this means that to support and continue to secure international production, attention needs to be paid to support for the local industry and its capacity and vice versa. This logic is writ large in the Victorian government strategy committing Central City Studios to an active integration of local and international production and in Queensland with the Pacific Film and Television Commission's current dual emphasis on local and international productions and developing the Queensland involvement in the local production industry as a means to grow the industry to its next stage.

As noted earlier this focus on supplying different markets and sectors expands the sense of provenance of the film and television production industry to include all those areas using audio and audiovisual services – particularly the computer games, popular music, online multimedia applications in museums, galleries and special events and so on. In the process film becomes part of a larger 'ensemble' – whether it is the emerging 'creative industries' frameworks of the National Office of the Information Economy, Multimedia Victoria, or the various departments of state development, or the 'film and interactive media' in Gold Coast City Council's 'Creative City' strategy.

Further encouraging the uptake of these film services approaches have been the circumstances in which governmental and community support for studio complexes has emerged. This support is, as each of the studio complexes in Sydney, the Gold Coast and Melbourne amply demonstrates, as likely to be sourced outside as inside the film industry-related portfolios of government. Indeed a 'new consideration' has been their importance on the regional development horizon and their priority for state governments and local councils as much as their national priority. This has been of particular importance in Melbourne and the Gold Coast. In circumstances where, as Phil Cooke observes, 'policy is moving towards a notion of the region as an important level at which strategic innovation support is appropriate',¹⁸⁰ studios become significant advantages for a region's innovation system.

While it is true that the nature and character of the relations between the two industries are a product of history and past policy attention, it is also the case that the contemporary reality of studio complexes is being shaped by emerging government priorities in which film and interactive media are valued not so

¹⁸⁰ Philip Cooke (2002), 'New Media and New Economy Cluster Dynamics' in Leah Lievrouw and Sonia Livingstone (eds), *The Handbook of New Media*, London: Sage, p. 294.

much in themselves as for their larger consequences – the creative industries as ‘locomotive industries’. Here attention is given to ‘studio developments’ as part of an ensemble of services and infrastructure in the film, television and interactive media areas in a particular region and nation. The priority is placed on film and television as cultural-product industries produced in particular regional agglomerations by interlocking firms ranging from the small to medium-sized enterprise to multinational corporations, all of which are linked to intersecting local and international networks.

First, this attention is helped by the increasing role played by regional authorities and local governments in film policy. Where once there was little interest now there is considerable interest in film industries as a ‘locomotive’ development for a region. From a regional government perspective – whether it be the very large Brisbane and Gold Coast councils, the NSW or Victorian governments, or regional development organisations combining local and state government in Cairns – there is not the same interest in making binding distinctions between domestic and international industries. These agencies are predisposed to focus on locating activity of all kinds in their jurisdiction.

Second, governments at all levels have an interest in the two industries in part because of the growing blurring of the boundaries between them, particularly in the context of a broader interest in their relationship to other industries of strategic importance. In this context the ‘two film industries’ are thought of together and placed alongside related cultural product and entertainment industries like music, games and multimedia on the one hand and information and communication technology (ICT) industries on the other hand. This means that those involved in seeking to promote and develop policy for the ICT industries get interested in the film industry (meaning the local and international-oriented components of it) as a vehicle for generating high technology products, applications and processes for uptake in local and international production settings. At the same time the emerging creative industries policies are concerned with coordinating, integrating and facilitating connections among the different parts of the film industry and other arts-related industries. Here the policy intent is clearly to make parallel industries convergent.

Attention then needs to be paid to specifying the existing character and nature of the intersection of local and international production, and finding ways in which this intersection could become more productive, and mutually advantageous – in short, synergised as a matter of active policy. As a consequence, supplying services in the market for local film and television domestically and internationally becomes more seamlessly situated on a continuum with supplying typically disaggregated film services for an offshore production industry. The focus is resolutely placed on identifying and supporting clusters of creativity and creative businesses. Cluster and its entailment of precinct thinking is generating much of the new interest in studio developments around Australia at all levels of government, with studio complexes acquiring a new centrality in thinking about what a healthy film and television production milieu might comprise.

There is now a considerable body of work on creative clusters which sees the clustering of activity as critically central to creativity (which is seen to proceed from clustering), to cycles of innovation and to growth in the creative sector in a particular location – particularly of the commercial cultural product industries.¹⁸¹ Governments of all kinds from local, to state to federal have become interested in clustering as a policy for national, state and domestic innovation systems and consequently as an approach to industry development. This, in turn, has focussed governmental attention on creating the conditions in which companies can situate themselves.

The advantage to policy makers of thinking in terms of precincts and clusters is that it allows an intervention which is not targeted at one particular cultural form but several, it purposefully fosters a culture of innovation, it builds relationships and connections, it develops a milieu – for example, companies around the studio as innovative companies. And it powerfully refocuses our attention to film and television production making us think about its research and development, R & D aspects.

The innovation found is no longer just in the ‘individual film’ but in the *processes*, the *ensemble of technologies and practices*. Innovation is therefore as likely to be found in the *services* provided to the filmmaking process whether in the combination of services or the transactions and interactions between firms, or even the groups of interests in the field.

¹⁸¹ See Allen J. Scott (2000), *The Cultural Economy of Cities: Essays on the Geography of Image-Producing Industries*, London: Sage; National Office of the Information Economy and DCITA (2002), *Creative Industries Cluster Study: Stage One Report* Canberra: DCITA.

As noted earlier the issue of R&D has become very significant in the film industry for another reason. While it is almost axiomatic to see innovation in each and every unique product – each film – it is becoming increasingly axiomatic to locate film innovation in parts of the filmmaking process with the Hollywood blockbuster film being particularly looked to as a means of generating critical scale and investment in R & D. The Hollywood blockbuster film – the *Star Wars*, the *Scooby Doo*, the *Mission Impossible*, *The Matrix* – is a powerful engine room for global film innovation at a technological, organisational and film process dimension. It is now possible for some of these biggest films to be substantially made outside Hollywood utilising the capacity to disaggregate production inputs while retaining control. This is spreading research and development to other places and governments, filmmakers and film services companies are keen to get a share of this ‘cutting edge’ work.

With studio complexes themselves becoming an object of policy there has been a need to investigate, specify, develop and strategise the connections between the local production milieu and the international industries operating out of the studios. This does not mean that the ‘products’ – the individual productions – or the mechanisms for supporting local activity centred on individual productions like the Film Finance Corporation or the Australian Film Commission are unimportant. It just means that a new purpose and framework has enjoined this previous one.

Appendix: Information on key international studio complexes

AUSTRALIA	
Fox Studios Australia, Sydney, New South Wales.....	90
Warner Roadshow Studios, Coomera, Queensland.....	91
CANADA	
The Bridge Studios, Vancouver, British Columbia.....	92
Ciné Cité Montréal, Montreal, Quebec.....	93
Lion's Gate Studios, Vancouver, British Columbia.....	94
Toronto Film Studios, Toronto, Ontario.....	95
Vancouver Film Studios, Vancouver, British Columbia.....	96
CZECH REPUBLIC	
Barrandov Studios, Prague.....	97
Prague Studios, Prague.....	99
GERMANY	
Studio Babelsberg, Potsdam-Babelsberg.....	100
HUNGARY	
Mafilm, Budapest and Fót.....	102
IRELAND	
Ardmore Studios, Bray, Co. Wicklow.....	103
ITALY	
Cinecittà, Rome.....	104
MALTA	
Mediterranean Film Studios, Rinella.....	105
MEXICO	
Fox Baja Studios, Rosarito, Baja California.....	106
MOROCCO	
Atlas Corporation Studios, Ouarzazate.....	107
ROMANIA	
Castel Film Studios, Snagov near Bucharest.....	108
MediaPro Studios, Buftea near Bucharest.....	109
UNITED KINGDOM	
Ealing Studios, Ealing Green, London.....	110
Elstree Film and Television Studios, Borehamwood, Hertfordshire.....	111
Leavesden Studios, near Watford, Hertfordshire.....	112
Pinewood-Shepperton Studios, Iver Heath, Buckinghamshire and Shepperton, Middlesex.....	113

AUSTRALIA

Fox Studios Australia, Sydney, New South Wales

<http://www.foxstudios.com.au>

The Fox Studios complex is built on the site of the former Sydney Showgrounds, with most buildings converted to film production. Construction began in 1995 and was completed in 1998. The site also incorporates a large commercial precinct, Bent Street, comprising cinemas, retail and dining facilities, live entertainment venues, and markets.

Originally the facility was a joint venture between Fox Entertainment Group, a subsidiary of News Corporation, and Lend Lease Corporation. In 2001 News Corporation acquired Lend Lease's share of the production facility. Lend Lease now only holds shares in the commercial Bent Street precinct.

The terms of the complex's lease of the former Showgrounds site preclude the building or operation of a theme park. As an alternative, a studio tour, the Backlot Tour, was introduced, but closed in 2001 due to insufficient patronage. Some of the area previously devoted to the studio tour has been redeveloped to expand the production facilities.

Sound stages	Area		Dimensions
	m ²	ft ²	
No. 1:	3,535	38,036	282 x 135 x 66 ft (86 x 41.1 x 20 m)
No. 2:	3,007	32,355	211 x 153 x 48 ft (64.4 x 46.7 x 14.7 m)
No. 3:	1,324	14,246	131 x 109 x 38 ft (40 x 33.1 x 11.7 m)
No. 4:	751	8,080	109 x 74 x 32 ft (33.1 x 22.7 x 9.7 m)
No. 5:	935	10,060	116 x 87 x 32 ft (35.3 x 26.5 x 9.7 m)
No. 6:	745	8,016	92 x 87 x 32 ft (28.1 x 26.5 x 9.7 m)

Water tank: None.

Backlot: None.

Production and post-production services available onsite: Production offices; construction workshops; storage; camera, grip, lighting and gaffer equipment; broadcast equipment; location management; crew booking; casting; film storage and support; special effects; animation, CGI and digital postproduction services; 1 x 50-seat and 1 x 25-seat digital screening facilities; 3D scanning and model imaging; legal services; accounting services; stunt personnel; freight and transport; music composition; music editing, mixing and recording; sound recording and editing; ADR; foley; sound mixing; model making; animatronics.

Recent international feature film productions:

- *Star Wars: Episode 3* (2003) Lucasfilm Ltd (US)
- *The Matrix Reloaded* (2003) NPV Entertainment (US)/ Silver Pictures (US)/ Village Roadshow (Aus)/ Warner Bros (US)
- *The Matrix Revolutions* (2003) Village Roadshow (Aus)/ Warner Bros (US)
- *Star Wars Episode 2: Attack of the Clones* (2002) Lucasfilm Ltd (US)
- *Moulin Rouge!* (2001) Bazmark Films (Aus)
- *Mission Impossible 2* (2000) Cruise-Wagner Productions (US)/ MFP Munich Film Partners GmbH and Company I. Produktions KG (Ger)/ Paramount Pictures (US)

Warner Roadshow Studios, Coomera, Queensland http://www.movieworldstudios.com.au

This purpose-built development on a greenfields site was developed in initially for DEL, the Australian subsidiary of Italian film producer Dino De Laurentiis's media corporation DEG. Construction of the first four sound stages commenced in 1987, but following the stock market crash in that year, DEL was absorbed into Village Roadshow. A 50 per cent stake in the studio complex was sold to Warner Brothers in 1988, and the studio complex plan was expanded to include a theme park, Movie World. Stage 5 was added in 1990, and stage 6 in 1996. Production and post-production services have been provided by a number of tenant companies, although their numbers have been limited by the decision only to allow one provider of any service to rent space on the lot.

Although a number of Australian features made use of the facilities in its early years, from inception the complex was conceived to service international production. By virtue of the need to maintain use of the sound stages rather than by explicit design, the complex gained a reputation in the 1990s for international television series and MOW production. With the assistance of an \$8 million loan from the Queensland state government, stages 7 and 8 were added in 2002 in order to increase the complex's attraction as a location for international feature film production.

Sound stages	Area		Dimensions
	m ²	ft ²	
No. 1:	451	4,858	80 x 60 x 37 ft (24 x 18 x 11 m)
No. 2:	686	7,403	124 x 60 x 37 ft (38 x 18 x 11 m)
No. 3:	1,157	12,450	156 x 80 x 39 ft (47 x 24 x 12 m)
No. 4:	1,157	12,450	156 x 80 x 39 ft (47 x 24 x 12 m)
No. 5:	2,072	22,304	194 x 115 x 50 ft (59 x 35 x 15 m)
No. 6:	1,617	17,408	171 x 102 x 38 ft (52 x 32 x 12 m)
No. 7:	1,632	17,577	172 x 102 x 40.8 ft (53 x 32 x 12 m)
No. 8:	2,072	22,304	194 x 114 x 50 ft (59 x 35 x 15 m)

Water tank: Internal (inground in stage 5); 78 x 62 x 8 ft (24 x 19 x 2 m).

Backlot: 230 acres, no permanent sets.

Production and post-production services available onsite: Production offices; construction workshops; lockups/storage; camera, grip, lighting and gaffer equipment; casting; travel, accommodation, vehicles and freight service; green rooms, camera unit, make-up, wardrobe and cargo trucks and trailers; production services, accounting services and payroll; film processing laboratory and negative matching; 20-seat digital screening facility; armoury; special effects; sound design; sound editing; ADR; foley; visual effects.

Recent international feature film productions:

- *Peter Pan*: (2003); Universal Pictures (US)/ Columbia Pictures Corporation (US)/ Revolution Studios (US)/ Red Wagon Productions (US)/ Warner Roadshow Studios (Aus)/ Allied Stars (US)
- *Scooby Doo*: (2002); Atlas Entertainment (US)/ Hanna-Barbera Productions (US)/ Meespierson Film CV (Netherlands)/ Mosaic Media Group (US)/ Village Roadshow Productions (Aus)
- *Ghost Ship*: (2002); Dark Castle Entertainment (US)/ Ghost Ship Films Pty Ltd (Aus)/ NPV Entertainment (US)/ Village Roadshow Productions (Aus)/ Warner Bros (US)
- *Crocodile Dundee in LA*: (2001); Bungalow Productions (US)/ Silver Lion Films(US)/ Visionview (US)

CANADA

The Bridge Studios, Vancouver, British Columbia

<http://www.bridgestudios.com>

This 15-acre site of a former bridge-building plant was bought by the public water and transport utility BC Hydro and Transit in the mid-1970s and used as a bus repair depot and occasional film production venue until transformed by the British Columbia provincial government into a studio complex in 1986-87. The complex is a '4-wall facility', meaning that producers rent only the sound stages from the operators, and must access services and labour from other sources.

The complex is part of the Bridge Business Park, a mixed-use site comprising the studios, offices, light industrial, retail, restaurants and a hotel. The studios, which are located 15 minutes east of downtown and 30 minutes north-east of the airport, have been run by the British Columbia Pavilion Corporation, a Crown corporation, since 1989. The addition of a special effects stage significantly enhanced the attractiveness of both the complex and Vancouver as a whole for international production.

In April 1996, MGM Worldwide Television announced it would invest US\$2.5 million in construction of a new 25,000 square foot sound stage at the studios. The provincial government committed US\$1 million towards this, and MGM Worldwide Television's investment guaranteed its use of the stage for five years for filming its *Stargate* television series.¹⁸² In mid 2002, the provincial government issued a request for proposals to privatise the complex.

Sound stages	Area		Dimensions
	m ²	ft ²	
Effects stage	3,753	40,400	470 x 86 x 50 ft (143.3 x 26.2 x 15.2 m)
I	836.1	9,000	100 x 90 x 40 ft (30.5 x 29.4 x 12.2 m)
II	1,458.5	15,700	157 x 100 x 40 ft (47.9 x 30.5 x 12.2 m)
III	1,114.8	12,000	120 x 100 x 40 ft (36.6 x 30.5 x 12.2 m)
IV	1,393.5	15,000	150 x 100 x 40 ft (45.7 x 30.5 x 12.2 m)
V	1,161.3	12,500	115 x 110 x 40 ft (35.1 x 33.5 x 12.2 m)
VI	1,161.3	12,500	115 x 110 x 40 ft (35.1 x 33.5 x 12.2 m)

Water tank: None, but there are two dedicated water tank facilities in the Vancouver area.

Backlot: None.

Production and post-production services available onsite: Production offices; workshops; wardrobe; mill; mechanical special effects and props-making and equipment rental.

Recent international productions:

- *Dead Like Me* [TV series] (2003) MGM Television (US)
- *Santa Clause 2* [feature] (2002) Boxing Cat Films (US)/ Outlaw Productions (US)/ Walt Disney Pictures (US)
- *Ballistic: Ecks vs Sever* [feature] (2002) Chris Lee Productions (US)/ Dante Entertainment (US)/ Franchise Pictures (US)/ MHF Erste Academy Film GmbH & Co. Produktions K.G. (Ger)/ Supermega (US)
- *They* (2002) Focus Features (US)/ Good Machine (US)/ Radar Pictures Inc. (US)
- *Stargate SG-1* [TV series] (1997-) Kawoosh! Productions VII (Canada)/ Double Secret Productions (US)/ Gekko Film Corp. (US)/ Stargate SG-1 Production Inc. (US)

¹⁸² Victoria Bushnell (1996), 'Stage by Stage', *Hollywood Reporter*, 24 September, p. S-5 (Factiva).

Ciné Cité Montréal, Montreal, Quebec
<http://www.cinecit Montreal.com>

Ciné Cité Montréal was built in 1999 on the site of a former army base, with the aid of a C\$4 million loan from the provincial government. The studio is part of the Comweb Group, a group of film-related companies which offer production accounting and financial services, film support and special effects equipment manufacture, production services, and equipment hire. The group operates the six stages at Ciné Cité and another six sound stages on three sites in Montreal. It is also one of the partners in the Great Lakes Studios development in Toronto.

Sound stages	Area		Dimensions
	m ²	ft ²	
A	914.1	9,840	120 x 82 x 24 ft
B	891.4	9,595	101 x 95 x 24 ft
C	1,248.8	13,442	143 x 94 x 28 ft
D	1,397	15,038	146 x 103 x 45 ft
E	713.5	7,680	96 x 80 x 17 ft
K	1,715.7	18,468	162 x 114 x 20 ft
10 (Lasalle)	975.5	10,500	140 x 75 x 24 ft
11 (Lasalle)	975.5	10,500	140 x 75 x 24 ft
14 (Lasalle)	1,300.6	14,000	140 x 100 x 24 ft
5 (St-Paul)	464.5	5,000	100 x 50 x 26 ft
1 (NFB)	668.9	7,200	120 x 60 x 34 ft
2 (NFB)	209	2,250	50 x 45 x 18 ft

Water tanks: Two external.

Backlot: Army base buildings, military hospital, army headquarters, prison cells, vintage aeroplanes and air traffic control tower.

Production and post-production services available onsite: Production offices; camera, lighting, grip equipment rental; workshops; storage; rifle range; production financial services; special effects including animatronics, pyrotechnics and miniatures; honeywagon rentals; helicopter rentals; set construction; graphic design, printing and signage; fibre-optic video transmission

Lion's Gate Studios, Vancouver, British Columbia

<http://www.lionsgatestudios.com>

Formerly North Shore Studios, this purpose-built 13-acre production facility opened in 1989. It was purchased by Lion's Gate in 1998 for US\$24.5 million (C\$36 million) from co-owners television producer Stephen Cannell (*21 Jump Street*, *The Rockford Files*, *Baretta*) and Comweb Corp, a Canadian production equipment supply company.¹⁸³ The studios hosted production of the Fox television series *The X Files* from 1993 to 1998.

At the time of opening, the complex was Canada's largest film and television production facility, with six sound stages and hosting nine tenant service companies. Initial construction was aided by a C\$4.3 million loan from the provincial government. Lion's Gate also has a long-term lease on a five-acre, two-sound-stage facility in Vancouver, Eagle Creek Studios, which has hosted the films *Cats and Dogs* and *Insomnia* (2002).

Lion's Gate Studio's eighth sound stage was opened in December 2001. The facility, together with Lion's Gate's leased Eagle Creek Studios, generated revenue of US\$1.6 million in the three months to 31 December 2001. This represented around 1.5 per cent of the company's total revenues for the quarter.¹⁸⁴

Stage 2 incorporates a 16 x 16 x 8 ft (4.8 x 4.8 x 2.4 m) pit, and there is a helipad adjacent to stage 5.

Sound stages	Area		Dimensions
	m ²	ft ²	
1	1,331.8	14,336	128 x 112 x 30 ft (39 x 34.1 x 9.1 m)
2	1,331.8	14,336	128 x 112 x 30 ft (39 x 34.1 x 9.1 m)
3	1,331.8	14,336	128 x 112 x 30 ft (39 x 34.1 x 9.1 m)
4	957.2	10,304	112 x 92 x 30 ft (34.1 x 28 x 9.1 m)
5	957.2	10,304	112 x 92 x 30 ft (34.1 x 28 x 9.1 m)
6	1,331.8	14,336	128 x 112 x 30 ft (39 x 34.1 x 9.1 m)
7	1,853.4	19,950	190 x 105 x 30 ft (57.9 x 32 x 9.1 m)

Water tank: None, but there are two dedicated water tank facilities in the Vancouver area.

Backlot: Facades of commercial districts, residential neighbourhoods, retail space, office buildings, courthouse, small town main street.

Production and post-production services available onsite: Production offices; mills; workshops; storage; camera, grip, lighting equipment hire; furniture rental; laundry facilities; sound recording; sound editing; sound mixing theatres; editing suites; ADR stage; foley stage; sound effects library; screening facilities.

Recent international feature film productions:

- *Willard* (2003) New Line Cinema (US)
- *Freddy vs. Jason* (2003) Avery Pix (US)/ New Line Cinema (US)/ Sean S. Cunningham Films (US)/ WTC Productions (US)
- *Agent Cody Banks* (2002) Dylan Sellers Productions (US)/ Maverick Entertainment Inc. (US)/ Metro-Goldwyn-Mayer (US)/ Splendid Pictures Inc. (US)
- *Trapped* (2002) Mandolin Entertainment (US)/ Propaganda Films (US)/ Senator Film Produktion GmbH (Ger)/ The Canton Company (US)

¹⁸³ John Lippman (1998) 'Canadian Mining Financier Digs for Gold in Tinseltown', *Wall Street Journal*, 29 June, p. B1 (Factiva). Michael McCullough (1998), 'Frank G. Goes To Hollywood', *Globe and Mail* (Toronto), 29 May, p. 56 (Factiva).

¹⁸⁴ 'Lions Gate Posts 61% Quarterly Growth in Revenue' (2002), *Canada NewsWire* 15 February (Factiva).

Toronto Film Studios, Toronto, Ontario
<http://www.torontofilmstudios.com>

This 10-acre complex close to downtown Toronto is owned by the Rose Corporation, a real estate merchant bank. The complex recently acquired a 10-acre parcel of adjacent land with a view to building further sound stages.

Sound stages	Area		Dimensions
	m ²	ft ²	
1	970	10,440	145 x 72 x 26 ft (44.2 x 22 x 7.9 m)
2	271	2,920	73 x 40 x 35 ft (22.3 x 12.2 x 10.7 m)
3	1,160	12,483	171 x 73 x 35 ft (52.1 x 22.3 x 10.7 m)
4	2157	23,214	318 x 73 x 35 ft (96.9 x 22.3 x 10.7 m)
5	445	4,788	84 x 57 x 35 ft (25.6 x 17.4 x 10.7 m)
6	673	7,239	127 x 57 x 35 ft (38.7 x 17.4 x 10.7 m)
7	708	7,616	119 x 64 x 35 ft (36.3 x 19.5 x 10.7 m)
8	1,158	12,470	215 x 58 x 25 ft (65.5 x 17.7 x 7.6 m)
9	2275	24,490	310 x 79 x 46 ft (94.5 x 24 x 14 m)
10	691	7,440	93 x 80 x 27 ft (28.4 x 24.4 x 8.2 m)
11	381	4,096	64 x 64 x 27 ft (19.5 x 19.5 x 8.2 m)
12	301	3,240	60 x 54 x 27 ft (18.3 x 16.5 x 8.2 m)
13	134	1,440	40 x 36 x 16 ft (12.2 x 11 x 4.9 m)
14	189	2,030	58 x 35 x 16 ft (17.7 x 10.7 x 4.9 m)
15	835	8,990	155 x 58 x 20 ft (47.2 x 17.7 x 6.1 m)
16	370	3,984	83 x 48 x 18 ft (25.3 x 14.6 x 5.5 m)

Water tank: None.

Backlot: Mock-up of A310 aeroplane, air traffic control tower, helicopter cabin, portable cabin set, maximum security prison set, New York apartment set.

Production and post-production services available onsite: Production offices; storage; workshops.

Recent international feature film productions:

- *Death to Smoochy* (2002) FilmFour (UK)/ Mad Chance (US)/ Senator Film Produktion GmbH (Ger)/ Warner Bros. (US)
- *Frequency* (2000) New Line Cinema (US)
- *Urban Legends: Final Cut* (2000) Original Film (US)/ Pheonix Pictures (US)
- *The Hurricane* (1999) Azoff Entertainment (US)/ Beacon Communications LLC (US)/ Universal Pictures (US)

Vancouver Film Studios, Vancouver, British Columbia
<http://www.vancouverfilmstudios.com>

In 1999, the British Columbia government provided a C\$20 million commercial loan towards the C\$70 million redevelopment of this 28-acre site, which is owned by real estate investment firm the McLean Group. The site had regularly been used for film and television production work since 1989. Existing warehouses previously been used for filmmaking were renovated, and new sound stages built.

The site incorporates a helipad, and has a 1 gigabyte fibre optic backbone.

Sound stages	Area		Dimensions
	m ²	ft ²	
A1	1,161.3	12,500	125 x 100 x 40 ft (38.1 x 30.5 x 12.2 m)
A2	1,393.5	15,000	150 x 100 x 40 ft (45.7 x 30.5 x 12.2 m)
B1/B2	1,393.5	15,000	150 x 100 x 40 ft (45.7 x 30.5 x 12.2 m)
B3	427.3	4,600	78 x 59 x 18 ft (23.8 x 18 x 5.5 m)
F1	533.2	5,740	89 x 42 x 20 ft (27.1 x 12.8 x 6.1 m)
F2	734.4	7,905	85 x 75 x 16 ft (25.9 x 22.9 x 4.9 m)
G1	1,523.6	16,400	164 x 110 x 40 ft (50 x 33.5 x 12.2 m)
J1	1,393.5	15,000	150 x 100 x 40 ft (45.7 x 30.5 x 12.2 m)
J2	1,393.5	15,000	150 x 100 x 40 ft (45.7 x 30.5 x 12.2 m)
J3	1,672.2	18,000	150 x 120 x 40 ft (45.7 x 36.6 x 12.2 m)
L (effects stage)	896.3	9,648	144 x 67 x 24 ft (43.9 x 20.4 x 7.3 m)
M1	2,170.1	23,360	75 x 45-125 x 160 x 19 ft (22.9 x 13.7-38.1 x 48.8 x 5.8 m)

Water tank: None, but there are two dedicated water tank facilities in the Vancouver area.

Backlot: None.

Production and post-production services available onsite: Production offices; workshops; mill; production services; lighting and grip equipment rental; signwriting; graphic design; vehicle rental; waste management.

Recent international feature film productions:

- *X-Men 2* (2003) 20th Century Fox (US)/ Donner/Schuler-Donner Productions (US)/ Marvel Entertainment (US)
- *Santa Clause 2* (2002) Boxing Cat Films (US)/ Outlaw Productions (US)/ Walt Disney Pictures (US)
- *Saving Silverman* (2001) Columbia Pictures Corporation (US)/ NPV Entertainment (US)/ Original Film (US)/ Village Roadshow Productions (Aus)
- *Kevin of the North* (2001) CLT-UFA International (Ger)/ SND (Fra)/ Screen Media Ventures LLC (US)

CZECH REPUBLIC

Barrandov Studios, Prague

<http://www.barrandov.cz/welcome.htm>

Barrandov Studios, which opened in 1932, were developed and first owned by the uncle of the first President of Czechoslovakia in the post-Communist era, Vaclav Havel. The complex was initially established to attract international production, although domestic production became increasingly important through the 1930s. Among the films made at the studio in its first decade were multi-language versions of Victor Tourjansky's *Volga en Flammes/Volha v Plamenech/Volga in Flames* (1933) and Nicolas Farkas's *Port Arthur* (1936), and Julien Duvivier's French-language version of *Le Golem/Golem* (1936).

During the Second World War the studios were taken over by the German occupying forces who added three massive sound stages. After the war, the studios were taken over by the state and while a number of international—principally German—productions were shot there prior to the fall of the Communist regime in 1989, the studios were principally oriented towards domestic production. During the nationalised period, a film laboratory and special effects stage were added to the complex.

In 1992, the complex was privatised and sold to Cinepont, a company comprising 25 film managers and workers headed by Barrandov's executive officer Vaclav Marhouk. In response to local filmmakers' fears that privatisation would devastate local production, the Ministry of Culture kept a 'golden share' in the complex, designed to guarantee ongoing use of the complex for filmmaking, and ongoing access to the facilities for Czech filmmakers. However, a commercial court declared the 'golden share' legally invalid in 2000. It has been proposed instead that future owners of the complex sign a contract with the government that would ensure continuity of production and guarantee some amount of local production. The studios are currently owned by the Moravia Steel corporation.

The Barrandov Studios complex comprises 11 stages on two sites, with the smaller Hostivar site located 15 minutes from the main site. The four sound stages on the Hostivar site are primarily used for shooting commercials, and this site also hosts production offices, set construction facilities and lighting equipment rental facilities. Stages 5, 6 and 7 on the Barrandov site are connected by large sliding doors, which create a 426 ft (130 m) long space when opened.

Barrandov is also home to TV Nova, a Czech television network, and the complex has facilities for television program and commercials production. 24 films were shot at the studios in 2002, and studio management reported revenues of CZK 730 million (c. US\$25 million, A\$42.5 million) and a CZK 63 million profit (c. US\$2.15 million, A\$3.6 million) for the year. Production services provided the bulk of revenues. Studio management are also negotiating a permit to construct two or three new sound stages on the Barrandov site.

Sound stages	Area		Dimensions
	m ²	ft ²	
1	640	6,930	105 x 66 x 36 ft (32 x 20 x 11 m)
2	640	6,930	105 x 66 x 36 ft (32 x 20 x 11 m)
3	360	3,871	79 x 49 x 30 ft (24 x 15 x 9 m)
4	748	8,064	112 x 72 x 33 ft (34 x 22 x 10 m)
5	1,160	12,445	131 x 95 x 39 ft (40 x 29 x 12 m)
6	2,000	21,484	164 x 131 x 39 ft (50 x 40 x 12 m)
7	1160	12,445	131 x 95 x 39 ft (40 x 29 x 12 m)
1H	540	5,782	98 x 59 x 20 ft (30 x 18 x 6 m)
2H	540	5,782	98 x 59 x 26 ft (30 x 18 x 8 m)
3H	748	8,064	112 x 72 x 36 ft (34 x 22 x 11 m)
4H	748	8,064	112 x 72 x 36 ft (34 x 22 x 11 m)

Water tanks: Two internal – one in Barrandov stage 3 (36 x 30 x 5 ft; 11 x 9 x 1.5 m), which also includes a tunnel for special effects projection; one in Hostivar stage 2H (35 x 21 x 8 ft; 10.5 x 6.5 x 2.5 m).

One external at Barrandov (69 x 26 x 5.9 ft; 21 x 8 x 1.8 m).

Backlot: 40 acres (160,000 m²).

Production and post-production services available onsite: Workshops; costumes; tailoring; props; special effects; armoury; fireworks; set construction and materials; model making; metal working; signwriting; camera, grips, sound and lighting equipment and crew hire; digital television production and editing services; casting; film processing laboratory; film stock sale; telecine; credits and optical effects; VHS duplication; subtitling; sound recording, dubbing, mixing; sound effects; scoring stage; music recording.

Recent international feature film productions:

- *The League of Extraordinary Gentlemen* (2003) 20th Century Fox (US)/ Angry Films (US)/ JD Productions (US)/ Mediastream 1. Produktions GmbH (Ger)
- *Shanghai Knights* (2003) All Knight Productions LLC (US)/ Jackie Chan Films Ltd (Hong Kong)/ Roger Birnbaum Productions (US)/ Spyglass Entertainment (US)/ Stillking (Czech Republic)/ Touchstone Pictures (US)
- *Paradise Found* (2002) Adelaide Motion Picture Company (Australia)/ ApolloMedia (Ger)/ Grosvenor Park Productions (UK)/ Le Sabre (Fr)
- *The Bourne Identity* (2002) Hypnotic (US)/ Kalima Produktions GmbH & Co. KG (Ger)/ Stillking (Czech Republic)/ The Kennedy/Marshall Company (US)/ Universal Pictures (US)
- *The Zookeeper* (2001) Svendsen Films ApS (Denmark)/ Apollo Films Ltd (UK)/ Pavel Novy Produkce s.r.o (Czech Republic)/ Maborosi (Netherlands)

Prague Studios, Prague
<http://www.praguestudios.com>

Prague Studios occupy the site of a former aircraft factory north of Prague. The site was first used for film production in 1999, but did not operate as a dedicated production facility until December 2001 after a CZK 60 million (approximately A\$3.5 million) refit. The studios are owned by the Los Angeles-based production company Milk and Honey Productions. They have limited production and post-production services onsite, although in December 2002 the London-based post-production firm Midnight Transfer took an undisclosed size stake in the studios and announced its intention to establish a presence on the lot with a view to creating a full-service, digital-ready production facility.

Stage 2 is divided in to three sections and shares a wall with stage 1. Stage 5 has a 7 ft (2.1 m) pit under the stage floor.

Sound stages	Area		Dimensions
	m ²	ft ²	
1	2,945	31,722	311 x 102 x 30 ft (95 x 31 x 9 m)
2	2,565	27,679	311 x 89 x 14.8 ft (95 x 27 x 4.5 m)
5	1,800	19,404	196 x 99 x 39 ft (60 x 30 x 12 m)

Water tank: One internal, in stage 2, installed for the filming of *xXx*, 82 x 49 x 6.5 ft (25 x 15 x 2m).

Backlot: None.

Production and post-production services available on site: Production offices, workshops.

Recent international feature film productions:

- *xXx* (2002) Original Film (US)/ Revolution Studios (US)
- *Blade II – Bloodlust* (2002) Amen Ra Films (US)/ Imaginary Forces (US)/ Justin Pictures (US)/ Milk and Honey Productions (US)/ New Line Cinema (US)
- *Children of Dune* (TV) Blixa Film Produktion GmbH & Co KG (Ger)/ New Amsterdam Entertainment Inc. (US)/ Touchstone Pictures (US)
- *Anne Frank* (TV) Dorothy Pictures (US)/ Milk and Honey Productions (US)/ Touchstone Television (US)

GERMANY

Studio Babelsberg, Potsdam-Babelsberg

<http://www.sbmp.biz>

The oldest building on the Studio Babelsberg lot, the Marlene Dietrich Halle, dates from 1926, while films were first shot in Babelsberg in 1911. Studio Babelsberg is currently owned by the multinational media conglomerate Vivendi Universal, which purchased the site in 1992 from the Treuhand, the agency disposing of assets of the former state of East Germany. The history of the complex is to a great extent the history of filmmaking in Germany, as it has consistently been transformed to meet cinema's new challenges.

Around the complex a 'media city' has been built in an effort to concentrate creative resources; the development has attracted companies working across all types of media production which complement the range of services offered by the studio's own departments. The studio itself contains sound stages, an art department in demand for its expertise in imagining theme park and other entertainment venues and experiences as well as for the enormous stock of costumes and props collected over time, and a wide variety of production and post-production services. The site also houses numerous production companies and offices of major media companies, two television networks, the regional film commission, and a film school.

Studio Babelsberg is involved in a number of collaborative ventures with other German studio complexes and companies, including the Television Centre, Fernsehzentrum Babelsberg, which is a subsidiary of Vivendi Deutschland and Studio Hamburg and includes four television studios; UFA-Babelsberg, a joint venture production company between Studio Babelsberg and the Bertelsmann-owned UFA; the ZFF Centre for Film and Television Producers, or Medienhaus, a joint venture between Studio Babelsberg and Technologie und Gewerbezentren Potsdam (Technology and Business Centres Potsdam); the Media Initiative Babelsberg (Medieninitiative Babelsberg), a network of media companies both within the studio and media city, and from Brandenburg more widely; and production.net berlin-babelsberg, which promotes production and technology in the region. Studio Babelsberg also has a number of regional partners.

Sound stages	Area		Dimensions
	m ²	ft ²	
Marlene Dietrich Middle Stage	2,067	22,256	186.4 x 119.4 x 45.9 ft (56.8 x 36.4 x 14 m)
Marlene Dietrich Grand North Stage	1,643	17,654	183.7 x 96.1 x 45.9 ft (56 x 29.3 x 14 m)
Marlene Dietrich Grand South Stage	1,643	17,654	183.7 x 96.1 x 45.9 ft (56 x 29.3 x 14 m)
Tonkreuz North Stage	600	6,458	98.4 x 65.6 x 32.8ft (30 x 20 x 10 m)
Tonkreuz South Stage	600	6,458	98.4 x 65.6 x 32.8ft (30 x 20 x 10 m)
Tonkreuz East Stage	450	4,844	82 x 59 x 29.5ft (25 x 18 x 9 m)
Tonkreuz West Stage	450	4,844	82 x 59 x 29.5ft (25 x 18 x 9 m)
New West	660	7,104	113.8 x 62.3 x 25.2ft (34.7 x 19 x 7.7 m)
New East	660	7,104	113.8 x 62.3 x 25.2ft (34.7 x 19 x 7.7 m)

Water tanks: Three internal: two in Marlene Dietrich Middle Stage, 52 x 32.8 ft (16 x 10 m) and 9.8 x 9.8 ft (3 x 3 m); one in Marlene Dietrich Grand South Stage, 19.7 x 19.7 ft (6 x 6 m).

Backlot: Crossroads comprising facades of 26 buildings over an area of around 75,000 ft² (c.7000 m²).

Production and post-production services available onsite: Workshops; production offices; mills; stores; picture and sound editing suites; set construction, design and decoration; props; costumes; make-up; painting and signwriting; model making; carpentry; metal work; film and video processing laboratory; sound recording and mixing; sound effects library; dubbing; special effects and armoury. Other services are offered by partner companies based off-lot.

Recent international feature film productions:

- *Around the World in 80 Days* (2003) Walden Media (US)/ Paramount Pictures (US)
- *The Pianist* (2002) Agencja Produkcji Filmowej (Poland)/ Beverley Detroit (US)/ Canal+ Polska (Poland)/ FilmFernsehFonds Bayern (Ger) Filmboard Berlin-Brandenburg (Ger)/ Filmförderungsanstalt (Ger)/ Héritage Films (France)/ Interscope Communications (US)/ Le Studio Canal+ (France)/ Mainstream SA/

Meespierson Film CV (Netherlands)/ R.P. Productions (France)/ Runteam Ltd (UK)/ Studio Babelsberg (Ger)/ Studio Canal (Fra)/ Telewizja Polska SA (Poland)

- *Nick Knatterton – Der Film* (2002) Cult-Filmproduktions GmbH (Austria)/ Helkon Media AG (Ger)/ Me, Myself and I Film- und Fernsehproduktions GmbH (Ger)/ Studio Babelsberg Independents (Ger)
- *Enemy at the Gates* (2001) DOS (Ger)/ KC Medien AG (Ger)/ Little Bird Ltd (Ireland)/ MP Film Management (Ger)/ Mandalay Pictures (US)/ Paramount Pictures (US)/ Reperage (Fr)/ Swanford Films (UK)
- *Marlene* (2000) Perathon Film- und Fernsehproduktions GmbH (Ger)/ Radiotelevisione Italiana (RAI) (Italy)/ Studio Babelsberg (Ger)/ Trebitsch Produktion International (Ger)/ Zweites Deutsches Fernsehen (ZDF) (Ger)

HUNGARY

Mafilm, Budapest and Fót

<http://www.mafilm.hu>

The Mafilm Studios complex is located on two sites, one in Budapest and the other in the town of Fót approximately 20 km from Budapest. The studios were nationalised in 1948 and partially privatised in 1995. They are currently entirely state-owned, after the state privatisation and asset management holding APV Rt and the Motion Picture Public Foundation of Hungary in 2000 bought back the minority share owned by Transatlantic Media Associates, a company established in Hungary to service and facilitate international production.

The studios supply all production and post-production services through a number of subsidiaries. Plans have been on the table since 2000 to turn the Fót site in to a media park but have yet to proceed past the planning stage. While Mafilm has attracted a substantial amount of international production over recent decades, the studios are considered to be technologically inferior to those in Prague.

Sound stages	Area		Dimensions
	m ²	ft ²	
Máriásy (Fót)	1,053	11,334	160.8 x 70.5 x 37.7 ft (49 x 21.5 x 11.5 m)
Huszárik (Fót)	1,053	11,334	160.8 x 70.5 x 37.7 ft (49 x 21.5 x 11.5 m)
3 and 4 (Budapest)	832	8,956	124 x 72.2 x 39.4 ft (37.8 x 22 x 12 m)

Water tank: One internal in stages 3 and 4 (Budapest), 32.8 x 32.8 x 9.8 ft (10 x 10 x 3 m).

Backlot: Large number of permanent medieval city sets at Fót.

Production and post-production services available onsite: Production offices; workshops; storerooms; camera, lighting and grip equipment hire; set design, construction and decoration; costume; special effects and armoury; sound editing suites; sound mixing and recording; dubbing and subtitling; ADR; foley; crew hire; casting.

Recent international feature film productions:

- *Dinotopia* (2002) ABC Productions (US)/ Hallmark Entertainment (US)
- *Sniper II* (2002) Columbia Pictures Corporation (US)/ Sandstorm Films (US)/ Sniper 2 Productions Ltd (US)/ Sony Screen Gems (US)
- *I Spy* (2002) C-2 Pictures (US)/ Columbia Pictures Corporation (US)/ Sheldon Leonard Productions (US)/ Tall Trees Productions (US)
- *Napoléon* (2002) ASP Productions (It)/ GMT Productions (Fr)/ Kekchi Films Productions (Fr)/ Kirchmedia (Ger)/ MA Films (Fr)/ Spice Factory Ltd (UK)/ Transfilm (Ger)

IRELAND

Ardmore Studios, Bray, Co. Wicklow

<http://www.ardmore.ie>

The Ardmore Studios complex, 12 miles south of Dublin, was established by the Irish Department of Trade and Industry in 1958 as a national film studio, but indigenous production did not flourish because of expense and a lack of technical staff.

The complex has a chequered commercial history, going into receivership a number of times, and seeing between public and private ownership. It was government-owned for its first nine years, was later bought by the Irish public broadcaster RTE, and from 1975 under the chairmanship of John Boorman it functioned as the National Film Studio of Ireland. The complex has also had a number of international owners, including one consortium supported by Bing Crosby and John Huston, and another including MTM (Mary Tyler Moore) Enterprises.

Production in Ireland may be affected by the Irish government's recent announcement of its intention to terminate the tax incentive for film production under section 481 of the Taxes Consolidation Act in December 2004. Ardmore faces competition from the recent Isle of Man development, and this may increase if some of the other studio complex developments currently being proposed in the UK proceed.

Sound stages	Area		Dimensions
	m ²	ft ²	
A	743	8,000	100 x 80 x 28.5 ft (30.5 x 24.4 x 8.7 m)
B	743	8,000	100 x 80 x 28.5 ft (30.5 x 24.4 x 8.7 m)
C	279	3,000	60 x 50 x 24 ft (18.3 x 15.2 x 7.3 m)
D	1,397	15,035	155 x 97 x 35 ft (47.2 x 29.6 x 10.7 m)
E	579	6,237	81 x 77 x 20 ft (24.7 x 23.5 x 6.1 m)

Water tank: One internal, in stage A, 24 x 20 x 9 ft.

Backlot: None.

Production and post-production services available on site: Production offices; lighting, rigging and camera equipment hire; production consultancy; special effects; preview/dubbing theatres and editing suites; workshops and prop stores; restaurant, bar and catering services; star dressing rooms; sound mixing, dubbing, editing; ADR; foley.

Recent international feature film productions:

- *Highlanders* (2003) Emperor Multimedia Group (Hong Kong)
- *Ella Enchanted* (2003) Blessington Film Productions (US)/ Jane Startz Productions (US)/ Miramax Films (US)/ Momentum Films (US)
- *Evelyn* (2002) CineEvelyn (UK)/ Cinerenta Medienbeteiligungs KG (Ger)/ First Look Media (US)/ Irish Dream Time (Ire)/ Meespierson Film CV (Netherlands)
- *Reign of Fire* (2002) Birnbaum/Barber (US)/ Spyglass Entertainment (US)/ The Zanuck Company (US)/ Touchstone Pictures (US)/ Tripod Entertainment (US)

ITALY

Cinecittà, Rome

<http://www.cinecitta.com>

Cinecittà occupies 99 acres on the southern outskirts of Rome. Established in 1937 as a centrepiece of Fascist dictator Mussolini's cultural vision, the complex was privatised in the late 1990s, although the state retains an interest in the studios through its largest shareholder, Cinecittà Holdings, which is controlled by the Italian national Department for Arts and Cultural Activity. The privatisation has laid greater emphasis on rental of the facilities to international producers than in the recent past.

Cinecittà Digital, described by one of its founders as 'an evolutionary continuation of the processing lab',¹⁸⁵ opened in 2001 next door to the existing film laboratory. The complex's own construction expertise was called upon to build the facility, which performs a variety of functions including restoration, digital post-production, and digital projection.

Sound stages	Area		Dimensions
	m ²	ft ²	
1	450	4,844	98.4 x 49.2 x 29.5 ft (30 x 15 x 9 m)
2	800	8,611	131.2 x 65.1 x 32.3 ft (40 x 20 x 10 m)
3	800	8,611	131.2 x 65.1 x 32.3 ft (40 x 20 x 10 m)
4	450	4,844	98.4 x 49.2 x 32.3 ft (30 x 15 x 10 m)
5	3,200	34,445	262.5 x 131.2 x 45.9 ft (80 x 40 x 14 m)
8	800	8,611	131.2 x 65.1 x 32.3 ft (40 x 20 x 10 m)
9	450	4,844	98.4 x 49.2 x 32.3 ft (30 x 15 x 10 m)
10 (T-shaped)	1,493	16,072	164 x 65.1–98.4 x 16.4–42.7 ft (50 x 20–30 x 5–13 m)
11	455	4,898	114.8 x 42.7 x 32.3 ft (35 x 13 x 10 m)
12	943	10,150	134.5 x 75.5 x 9.8–16.4 ft (41 x 23 x 3–5 m)
13	800	8,611	131.2 x 65.1 x 32.3 ft (40 x 20 x 10 m)
14	800	8,611	131.2 x 65.1 x 32.3 ft (40 x 20 x 10 m)
15	1,800	19,375	196.8 x 98.4 x 42.7 ft (60 x 30 x 13 m)
16	300	3,229	98.4 x 32.3 x 23 ft (30 x 10 x 7 m)
18	798	8,590	187 x 45.9 x 19.7 ft (57 x 14 x 6 m)
19	513	5,522	187 x 29.5 x 19.7 ft (57 x 9 x 6 m)
20	798	8,590	187 x 45.9 x 19.7 ft (57 x 14 x 6 m)
21	513	5,522	187 x 29.5 x 19.7 ft (57 x 9 x 6 m)

Water tank: One external 'swimming pool', 460 x 196 x 5ft (140.2 x 59.7 x 1.5 m).

Backlot: A number of permanent sets on the Cinecittà lot, and offsite, a 2000-acre estate on the shores of Lake Bracciano is available for shooting.

Production and post-production services available onsite: Production offices; workshops; set design, construction and decoration; model making; sculpture; carpentry; painting; film processing laboratory; special effects; editing suites.

Recent international feature film productions:

- *Gangs of New York* (2002) Cappa Production (US)/ Incorporated Television Company (UK)/ Initial Entertainment Group (US)/ Meespierson Film CV (Netherlands)/ Miramax Films (US)/ PEA Films (It)/ Q&Q Medien GmbH (Ger)/ Splendid Medien AG (Ger)
- *U-571* (2000) Canal Plus Image International (Fra)/ Universal Pictures (US)
- *Titus* (1999) Clear Blue Sky Productions (US)/ NDF International (US)/ Overseas Film Group (US)/ Urania Film (It)
- *Midsummer Night's Dream* (1999) Fox Searchlight Pictures (US)/ Panoramica (It)/ Regency Enterprises (US)

¹⁸⁵ David Bush, cited in Cristina Clapp (2002) 'Digital Cinema: How Two Innovators Using Quantel and Other Leading-Edge Technologies Are Advancing the Science of Digital Intermediaries', *Digital Cinema*, 1 December, p. 20.

MALTA

Mediterranean Film Studios, Rinella

<http://www.mfsstudios.com>

The Mediterranean Film Studios began life in 1964 as a marine tank and special effects facility established to service international production. A second tank, added in 1979 for the filming of *Raise the Titanic*, can be filled to a depth of 35 feet. An indoor tank was built in 1996.

Mediterranean Film Studios was owned by the Maltese government until 1995 and has been owned since 1999 by German businessman Jost Merten. The complex has had some success recently in marketing itself as a niche water tank facility. It has no properly equipped sound stage, however.

Water tanks:

Two external: Surface water tank 300 x 400 x 6 ft deep (91.4 x 121.9 x 1.8 m); deep water tank, 354 ft diameter sloping down to 162 ft, depth 35 ft (107.9 down to 49.4 m, depth 10.7 m).

One internal: Insert tank 50 x 30 x 12 ft deep (15.2 x 9.1 x 3.6 m).

Production and post-production services available onsite: Production offices; swing stage; construction area; storage; crew hire; camera, lighting and grip equipment hire; catering; sound recording, mixing, mastering; ADR.

Recent international productions:

- *The League of Extraordinary Gentlemen* (2003) 20th Century Fox (US)/ Angry Films (US)/ JD Productions (US)/ Mediastream 1. Productions GmbH (Ger)
- *Pinocchio* (2002) Melampo Cinematografica (It)
- *Swept Away* (2002) Codi s.p.a. (It)/ SKA Films (UK)
- *The Count of Monte Cristo* (2002) Birnbauer/Barber (US)/ Count of Monte Cristo Ltd (UK)/ Spyglass Entertainment (US)/ Touchstone Pictures (US)/ World 2000 Entertainment Ltd. (Ireland)

MEXICO

Fox Baja Studios, Rosarito, Baja California <http://www.foxbaja.com>

Fox Baja Studios is located near the tourist resort town, Rosarito, approximately 30 minutes drive from the US border, or an hour from San Diego airport, or three hours from Los Angeles. The studios are owned by Fox Entertainment Group, which is 80 per cent owned by News Corporation. Construction of this purpose-built facility commenced in June 1996, and production work on the film which spawned the studios, *Titanic*, began three months later.

US and other foreign investment, mainly in tourism related projects, has driven a development boom in the Baja California region, but development has also raised serious environmental issues relating to pollution and potable water use. In response to public criticism, including that the studio's development was approved without a rigorous environmental impact assessment, Fox Baja commissioned its own environmental impact assessment and became involved in a variety of environmental projects including upgrading the facility's waste treatment plant and developing a recycling program. They also part-funded an oceanography scholarship for study on a local endangered fish and co-produced a documentary on efforts to save the fish.

The recent opening of a studio tour, Foxploration, indicates that tourism may increasingly supplement the volume of international production which has flowed unevenly through the studio since 1996.

Sound stages	Area		Dimensions
	m ²	ft ²	
2	3,019	32,500	250 x 130 x 50 ft (76.2 x 39.6 x 15.2 m)
3	1,570	16,900	130 x 130 x 50 ft (39.6 x 39.6 x 15.2 m)
4	1,570	16,900	130 x 130 x 50 ft (39.6 x 39.6 x 15.2 m)
5	669	7,200	120 x 60 x 40 ft (36.6 x 18.3 x 12.2 m)

Water tanks:

Two internal: In stage 2 (100 x 200 x 29 ft); and stage 4 (100 x 100 x 4 ft), with overflow horizon and deep insert tank (30 x 35 x 12 ft).

Two external: The main tank, tank 1, is an irregular shape with total area of over 360,000 ft², and a depth across most of its area of 3.5 ft. The tank also contains two deeper sections which can be filled independently. When full, there is a 420 ft 'infinite' horizon as the tank appears to blend into the Pacific Ocean in the background. The second external tank, tank 3, is designed for insert and surface effects, underwater and green screen photography.

Backlot: Approximately 5 acres (15,000 m²), with 500 feet of unobstructed ocean front view.

Production and post-production services available onsite: Diving centre, including equipment hire; workshops; heliport and helicopter rental; set construction equipment rental; grip and lighting equipment rental; projection and screening facilities. Most service providers recommended by the studios are located in the San Diego area, on the US side of the border, although the studio manual notes that there 'numerous' local residents who have gained experience on the studio's productions with skills in 'production, art department, construction, set dressing, hair, make-up, wardrobe and some FX, grip and electric crew'.

Recent international feature film productions:

- *Kung Pow: Enter the Fist* (2002) O Entertainment (US)
- *Pearl Harbor* (2001) Jerry Bruckheimer Films (US)/ Touchstone Pictures (US)
- *The Weight of Water* (2000) Le Studio Canal+ (Fra)/ Miracle Pictures (US)/ imX Communications Inc. (Ca)
- *Deep Blue Sea* (1999) Groucho III Film Partnership (US)/ Riche-Ludwig Productions (US)/ Village Roadshow Productions (Aus)/ Warner Bros (US)

MOROCCO

Atlas Corporation Studios, Ouarzazate

<http://www.atlastudios.com>

Located on a 50-hectare site just outside the city of Ouarzazate in southern Morocco, Atlas Corporation Studios was built in 1983 by the hotelier Mohamed Belghmi, owner of the Salam hotel chain. A hotel is located onsite. The area around the studio complex has been used for international production since the early 1960s, when parts of *Lawrence of Arabia* (1962) were filmed in and around Ouarzazate. The first production to make use of the complex was *The Jewel of the Nile* (1985), and it has subsequently been used for French and Italian, as well as English, language productions.

The studios' main advantages are its variety of sets and nearby locations, low labour costs, and the skill of the local set construction workers, set designers and craftsmen. For example, a 360,000 square foot set of the city of Alexandria was built for the Hallmark Entertainment production *Cleopatra* (1998), and the Tibetan House stage was built for Martin Scorsese's *Kundun* (1996). Its main drawback is the limited pool of local technicians and engineers. There are no post-production facilities onsite.

Sound stages	Area		Dimensions
	m ²	ft ²	
B	1,500	16,146	164 x 98.4 x 30.5 ft (50 x 30 x 9.3 m)
C	510	5,490	98.4 x 55.8 x 23 ft (30 x 17 x 7 m)
Tibetan House	500	5,382	82 x 65.6 x 23 ft (25 x 20 x 7 m)
Egyptian House	400	4,306	65.6 x 65.6 x 13.1 ft (20 x 20 x 4 m)

Water tank: None.

Backlot: Claimed to be 500 hectares, variety of permanent sets including Cleopatra Alley, Jewish village, Tibetan house, Caesar's palace.

Production and post-production services available onsite: Production offices; workshops; mills; set construction and design; props and props manufacture; costumes and costume manufacture; sculpting and modelling; generators; grip and lighting equipment rental; make-up; catering; trailers, transportation and vehicle rental; hotel accommodation; helipad and helicopter rental; animal wrangling, especially horses.

Recent international feature film productions:

- *Astérix et Obélix: Mission Cléopâtre* (2002) CP Medien AG (Ger)/ Centre National de la Cinématographie (CNC) (Fra)/ Chez Wam (Fra)/ KC Medien AG (Ger)/ Katharina (Fra)/ La Petite Reine (Fra)/ Le Studio Canal+ (Fra)/ Pathé Entertainment (Fra)/ Renn Productions (Fra)/ TF1 Films Productions (Fra)
- *Les Rois Mages* (2001) ABS S.a.r.l. (Fra)/ D.B. Production (Fra)/ Productions Paul Lederman (Fra)/ Renn Productions (Fra)/ TF1 Films Productions (Fra)
- *Gladiator* (2000) DreamWorks SKG (US)/ Scott Free Productions (UK)/ Universal Pictures (US)
- *Il Tempo dell'amore* (1999) 3 Emme Cinematografica (It)/ Hungry Eye (US)/ Noé Productions (Fr)

ROMANIA

Castel Film Studios, Snagov near Bucharest

<http://www.castelfilm.ro>

Castel Film Studios, located 20 miles (32 km) from Bucharest, was opened in 1992 to service international production. A commercial and advertising production department were opened in 1995, and a number of international commercials have been made at the studios. In 1996, a post-production facility was added, providing editing, CGI effects, and sound services. Kodak opened a film processing laboratory in Bucharest in 1999.

Sound stages	Area		Dimensions
	m ²	ft ²	
1	540	6,000	100 x 60 x 25 ft (30 x 18 x 7.5 m)
2	540	6,000	100 x 60 x 25 ft (30 x 18 x 7.5 m)
3	540	6,000	100 x 60 x 25 ft (30 x 18 x 7.5 m)
4	1,260	14,000	140 x 100 x 33 ft (42 x 30 x 10 m)
5	3,276	35,328	256 x 138 x 49 ft (78 x 42 x 15 m)

Water tanks: Two internal; one in stage 3, 9.8 x 6.6 x 6.6 ft (3 x 2 x 2 m); one in stage 5, 49.5 x 33.3 x 11.5 ft (15 x 10 x 3 m).

Backlot: The complex includes a number of permanent sets: a large castle; a 'mid-western' street; an 'American cul-de-sac'; a medieval village; 'Baker Street', an urban setting; and 'old London', a historic London street.

Production and post-production services available onsite: All services are provided by the studio, there are no onsite tenant service providers. Crew hire; camera, lighting, grip, sound equipment hire; casting; set construction; props; costumes; make-up; production offices; construction facilities and workshops; storage; digital editing; sound editing; graphic design and visual effects.

Recent international feature film productions:

- *Dracula II: The Ascension* (2003) Miramax Films (US)/ Dimension Films (US)
- *Case of Evil* (TV) (2002) Box TV (UK)/ Castel Film Romania (Romania)/ Pueblo AG/ Sherlock Holmes Films (US)/ USA Network (US)
- *Highlander: Endgame* (2000) Davis-Panzer Productions (US)/ Dimension Films (US)/ Mandalay Pictures (US)

MediaPro Studios, Buftea near Bucharest
<http://www.mediaprostudios.com>

The MediaPro Studios complex is owned by the media and entertainment group MediaPro, a subsidiary of the American company Central European Media Enterprises. It is located 19.5 km (12 miles) north-west of the Romanian capital, Bucharest. The site is the former national film studios, Buftea Film Studios, the epicentre of Romanian film production until 1989. A number of French feature films were shot there in the 1950s and 1960s. MediaPro bought the studios in 1998, and have invested heavily in refurbishment and technological upgrading.

The facility has been used for producing programs for Romanian television, and for producing domestic and international commercials. The first international film production shot after the sale to MediaPro was *Epicenter* (2000), which, like many of the features subsequently produced or shot at the complex, was co-produced by the studios' sister company, MediaPro Pictures.

Sound stages	Area		Dimensions
	m ²	ft ²	
1	823.6	8,866	116.5 x 76.1 x 37.4 ft (35.5 x 23.2 x 11.4 m)
2	411.25	4,420	77 x 57.4 x 26.2 ft (23.5 x 17.5 x 8 m)
3	411.25	4,420	77 x 57.4 x 26.2 ft (23.5 x 17.5 x 8 m)
4	823.6	8,866	116.5 x 76.1 x 37.4 ft (35.5 x 23.2 x 11.4 m)
5	388.44	4,186	76.8 x 54.5 x 36.1 ft (23.4 x 16.6 x 11 m)
6	380	4,090	85.3 x 52 x 27.9 ft (26 x 15.85 x 8.5 m)

Workshops: 35,000 ft²; 3252 m².

Water tanks: Internal in stage 5, 37.7 x 52.5 x 6.6 ft (11.5 x 16 x 2 m).

Backlot: Complex is adjacent to a 2,944,000 ft² (780,000 m²) lake.

Production and post-production services available onsite: All services are provided by MediaPro Studios. There are no tenant service providers on the lot. Production offices; dressing rooms; make-up rooms; props rooms; conference rooms; set construction – carpentry, locksmiths, mechanics, set painting, models and moulds, die casting, glazing, armoury; film laboratory; camera, lighting, grip, sound equipment hire; props; costumes; telecine; five digital and analog editing suites; five sound studios; CGI; satellite hub; travel services; catering; marketing.

Recent international feature film productions:

- *Boudica* (2003) Box Films (UK)/ MediaPro Pictures (Romania)
- *Haute Tension* (2003) Alexandre Films (Fra)/ Europa Corp. (Fra)
- *Callas Forever* (2001) Alquimia Cinema S.A. (Spain)/ Business Affair Production Ltd (UK)/ Cattleya S.P. (It)/ Film and General Productions (UK)/ France 2 Cinéma (Fr)/ Galfin (Fr)/ MediaPro Pictures (Romania)/ Medusa Produzione (It)
- *Amen* (2002) KC Medien AG (Ger)/ KG Productions (Fr)/ Katharina (Fr)/ Le Studio Canal+ (Fr)/ MediaPro Pictures (Romania)/ Renn Productions (Fr)/ TF1 Films Productions (Fr).

UNITED KINGDOM

Ealing Studios, Ealing Green, London

<http://www.ealingstudios.co.uk>

The Ealing Studios complex is owned by a consortium comprising filmmakers Barnaby Thompson, Uri Fruchtmann (Fragile Films), Internet entrepreneur John Kao (The Idea Factory) and property developer Harry Handelsman (Manhattan Loft Company). Located approximately 10 miles (16 km) west of central London, the studios were acquired for approximately US\$11 million in 2000 from the National Film and Television School.

The site of Ealing Studios was first used for filmmaking in 1902. From the 1930s to the 1950s under Head of Production Michael Balcon, the studios flourished, creating a new genre of film 'the Ealing comedy'. The studios were bought by the BBC in 1959 and used primarily for television production until they were sold to the NFTS in 1995. The NFTS planned to convert the facility into a new school, but plans were shelved because of funding shortfalls. An ongoing £50 million refurbishment will see the construction of an animation studio, new office space and auxiliary facilities, and refurbished sound stages, with the aim of making the site a media cluster. Among a number of tenant companies, the West London Film Office is located onsite.

The sound stages and the original administration building are heritage-listed. Stages 3A and 3B can be combined to create a space 145 x 85 x 32 ft (44.2 x 25.9 x 9.7 m). Stages 2 and 3A include a pit.

Sound stages	Area		Dimensions
	m ²	ft ²	
2	864	9,300	125 x 75 x 34 ft (38.4 x 22.7 x 10.3 m)
3A	530	5,800	85 x 70 x 32 ft (25.9 x 21.3 x 9.7 m)
3B	530	5,800	85 x 70 x 32 ft (25.9 x 21.3 x 9.7 m)
5 (no sound)	90	970	44 x 22 x 16 ft (13.4 x 6.7 x 4.8 m)

Water tanks: One in stage 2, 25 x 20 x 7 ft (7.6 x 6.1 x 2.1 m); one in stage 3B, 35 x 20 x 7.5 ft (10.9 x 6.1 x 2.3 m).

Production and post-production services available onsite: Production offices; workshops; catering. Tenant companies provide sound post-production facilities, special effects, visual effects, a variety of IT facilities and services, graphic design, talent agent services, online and offline editing equipment and facilities, chauffeur services, financial services.

Recent international feature film productions:

- *The Importance of Being Earnest* (2002) Fragile Films (UK)/ Miramax Films (US)
- Ealing Studios currently has a co-production alliance with John Williams of Vanguard Films to produce a number of CGI films. *Valiant* is currently in production.

Elstree Film and Television Studios, Borehamwood, Hertfordshire

<http://www.elstreefilmtv.com>

This historic studio complex was founded in 1926. Alfred Hitchcock directed the first British 'talkie', *Blackmail*, at Elstree in 1929, with other notable productions including the first three *Star Wars* films and the Indiana Jones trilogy. Hertsmere Borough Council bought the complex from the property development company Brent Walker for £1.9 million in 1996 after a long campaign by the Save Our Studios group. Brent Walker had allowed the facility to run down after successfully applying to convert some of the complex into a supermarket. Extensive renovation followed the council takeover, including the construction of two new sound stages at a total cost of around £10 million.¹⁸⁶ The studios are currently leased to Elstree Film and Television Studios Ltd. on a seven-year lease, signed in 2000. The council is responsible for the upkeep of the site, and spent over £500,000 in 2001/02 on repair work.

The new stages, 1 and 2, were opened in 1999, and are claimed to be the tallest in UK. The complex is home to around 40 tenant companies, and to the Children's Film and TV Foundation. Elstree now hosts a number of resident television productions including the UK version of *Who Wants to Be a Millionaire* and recent series of *Big Brother* and *Celebrity Big Brother*. Backlot hosts *East Enders*. In 2002, Tell Tale Productions, the company behind the hit children's show *The Tweenies*, built a new animation facility at the site. Stages 6 and 7 are television stages, while stages 7 and 9 have full digital production galleries.

Sound stages	Area		Dimensions
	m ²	ft ²	
1 (George Lucas stage)	1,465	15,786	135.5 x 116.5 x 50 ft (41.3 x 35.5 x 15.3 m)
2	1,465	15,786	135.5 x 116.5 x 50 ft (41.3 x 35.5 x 15.3 m)
5 (silent)	503	5,415	95 x 57 x 25 ft (29 x 17.4 x 7.6 m)
6	357	3,844	62 x 62 x 25 ft (18.9 x 18.9 x 7.6 m)
7	462.5	4,979	77.5 x 64.25 x 32 ft (23.6 x 19.6 x 9.8 m)
8	700	7,556	97.5 x 77.5 x 32 ft (29.7 x 23.6 x 9.8 m)
9	700	7,556	97.5 x 77.5 x 32 ft (29.7 x 23.6 x 9.8 m)

Water tanks: Two internal, in stage 8 and stage 9, both 30 x 31.3 x 9 ft (9.1 x 9.5 x 2.7m); one external, 196 ft wide narrowing to 98 ft, 131ft long and 3 ft deep (59.7 narrowing to 29.9 x 39.9 x 0.9 m), capacity 400,000 gallons, with inner tank 20 x 30 x 10 ft (6.1 x 9.1 x 3 m).

Backlot: 20 acres, five minutes drive away, currently housing sets for the BBC Television series *East Enders*.

Production and post-production services available onsite: Production offices; workshops and prop stores; set construction; mills; underwater filming services; accommodation and travel; rigging; camera, grip, lighting and sound equipment hire; hairdressing; model making and sculpture; drapery; plasterers; crew hire; safety products and clothing; vehicle rental; animatronics and special effects make-up; massage; laundry and cleaning; prop hire; edit rooms (unequipped); conference room; hospitality suite; restaurant; bar; rehearsal rooms; 28-seat preview theatre.

Recent international productions:

- *Keen Eddie* [TV series] (2003) Frequency Films (US)/ The Littlefield Company (US)/ Paramount British Pictures Ltd. (UK)/ Simon West Productions (UK)
- *Shanghai Knights* [feature] (2003) All Knight Productions LLC (US)/ Jackie Chan Films Ltd (Hong Kong)/ Roger Birnbaum Productions (US)/ Spyglass Entertainment (US)/ Stillking (Czech Republic)/ Touchstone Pictures (US) *Ashes and Sand* [feature] (2003) Matador Pictures (UK)/ Open Road Films (UK)
- *The Gathering* [feature] (2002) Fine Line Features (US)/ Granada Film Productions (UK)/ Samuelson Productions (UK)
- *Enigma* [feature] (2001) Broadway Pictures (US)/ Broadway Video (US)/ InterMedia Film Equities Ltd. (UK)/ Jagged Films (UK)/ Meespierson Film CV (Netherlands)/ Mulholland Pictures BV (Netherlands)/ Senator Film Produktion GmbH (Ger)

¹⁸⁶ 'When Film-Makers Seek Workspace' (1999), *The Times* (London), 14 May, p.33.

Leavesden Studios, near Watford, Hertfordshire
<http://www.leavesdenstudios.co.uk> (site under construction June 2003)

Leavesden Studios, built on the 286-acre site of a former aerodrome and aircraft factory, is located approximately 25 miles north-west of central London. The site was first used for filmmaking in 1994, and was purchased in 1995 by Millennium Group, a subsidiary of the Malaysian Datuk Keramat Holdings (DKH) group, which was also involved at the planning stage in the ill-fated Entertainment Village studio complex proposal outside Kuala Lumpur.

The original plan envisioned a studio complex, theme park, leisure centre, housing and office developments, but the site's location in the 'green belt' around London placed brakes on the development. Planning approval was granted by the local council in January 2003 for the development of a telecommunications, media and technology park on the site. Phase 2 of this development will include a further 200,000 square feet of film production facilities.

Sound stages	Area		Dimensions
	m ²	ft ²	
A (muted)	2,980	32,076	243 x 132 x 30 ft (74.1 x 40.2 x 9.1 m)
B (muted)	2,612	28,116	213 x 132 x 30 ft (64.9 x 40.2 x 9.1 m)
C (muted)	1,049	11,285	122 x 92 x 28 ft (37.2 x 28.2 x 8.5 m)
D (muted)	1,097	11,808	123 x 96 x 28 ft (37.5 x 29.3 x 8.5 m)
E (silent)	2,404	25,868	223 x 116 x 28 ft (68 x 35.4 x 8.5 m)
F (silent)	1,428	15,367	127 x 121 x 30 ft (38.8 x 36.8 x 9.1 m)

Backlot: Reported to be the largest in Europe.

Recent international feature film productions:

- *Harry Potter and the Chamber of Secrets* (2002) 1492 Pictures (US)/ Heyday Films (US)/ Miracle Productions GmbH (Ger)/ Warner Bros. (US)
- *Harry Potter and the Sorcerer's Stone* (2001) 1492 Pictures (US)/ Heyday Films (US)/ Warner Bros. (US)
- *Star Wars: Episode 1 – The Phantom Menace* (1999) 20th Century Fox (US)/ Lucasfilm Ltd. (US)
- *Mortal Kombat Annihilation* (1997) New Line Entertainment (US)/ Threshold Entertainment (US)

**Pinewood-Shepperton Studios,
Iver Heath, Buckinghamshire and Shepperton, Middlesex**
<http://www.pinewood-studios.co.uk>
<http://www.sheppertonstudios.co.uk>

These two facilities, approximately 20 miles apart – Pinewood in Buckinghamshire and Shepperton in Middlesex – merged in 2001 in order to better coordinate the use and availability of studio space in Britain for international production. Pinewood is approximately 20 miles (32 km) north-west of London; Shepperton is approximately 15 miles (24 km) south-west of London, close to Heathrow airport. The complexes are owned by a consortium headed by Michael Grade and Ivan Dunleavy. With the backing of the 3i venture capital group, the consortium bought Pinewood from its long-term owners the Rank group in 2000 for £62 million, and Shepperton from a consortium including Ridley and Tony Scott for £35 million in 2001.

Pinewood was built in 1936 on a country estate. New stages, viewing theatres and cutting rooms were added in the 1960s, and other facilities upgraded. Two new sound stages were opened in 1999, and two digital widescreen television studios were added in 2000–01.

Shepperton was established as ‘Sound City’ in 1931. The studio, comprising two sound stages, the manor house in whose grounds the complex was built, and extensive parklands, quickly attracted a number of production companies. Five more stages, 12 cutting rooms, three viewing theatres, scene docks and workshops were added in 1935–36 to meet the growing demand. One stage was destroyed in an air raid during the Second World War, but several of these stages remain in use to this day.

Under the direction of Alexander Korda, the studios were again expanded after the war, with the addition of a number of stages relocated from studios at Isleworth, as the complex played host to a number of British and American features. Two small stages were developed in the mid-1960s, but were combined as the David Lean building in 1995. The complex underwent extensive construction and refurbishment in the 1990s; another small stage, T, was built in 1992, stages R and S were opened in 1994, and a further two stages, J and K, were added in 1997.

The two complexes were linked by an intranet in 2002. Over 80 different service companies are located on the Shepperton lot, while Pinewood is home to 120.

Pinewood

Sound stages	Area		Dimensions
	m ²	ft ²	
Large stages			
A	1,685	18,150	165 x 110 x 35 ft (50.3 x 33.5 x 10.7 m)
D	1,685	18,150	165 x 110 x 35 ft (50.3 x 33.5 x 10.7 m)
E	1,685	18,150	165 x 110 x 35 ft (50.3 x 33.5 x 10.7 m)
R	1,780.62	19,140	165 x 116 x 35 ft (50.3 x 35.4 x 10.7 m)
S	1,780.62	19,140	165 x 116 x 35 ft (50.3 x 35.4 x 10.7 m)
oo7 stage (silent)	4,224.7	45,424	334 x 136 x 40.5 ft (101.8 x 1.5 x 12.3 m)
South Dock (silent)	1547.6	16,704	174 x 96 x 28 ft (53 x 29.2 x 8.5 m)
Medium stages			
B	827.5	8,910	110 x 81 x 34 ft (33.5 x 24.7 x 10.4 m)
C	827.5	8,910	110 x 81 x 34 ft (33.5 x 24.7 x 10.4 m)
F	698.5	7,500	75 x 100 x 35 ft (22.9 x 30.5 x 10.7 m)
Studio J	824.72	8,880	111 x 80 x 29.25 ft (33.8 x 24.4 x 8.9 m)
Studio K	824.72	8,880	111 x 80 x 29.25 ft (33.8 x 24.4 x 8.9 m)
L	880	9,450	105 x 90 x 30 ft (32 x 27.5 x 9.1 m)
M	880	9,450	105 x 90 x 30 ft (32 x 27.5 x 9.1 m)
N/P	767.88	8,320	80 x 104 x 19 ft (24.3 x 31.6 x 5.7 m)
Large process	453.9	4,900	175 x 28 x 28 (53.4 x 8.5 x 8.5 m)
Small stages			
G	247.5	2646	54 x 49 x 23 ft (16.5 x 15 x 7 m)
H	300.375	3,248.5	89 x 36.5 x 28 ft (27 x 11.125 x 8.5 m)

Shepperton

Sound stages	Area		Dimensions
	m ²	ft ²	
Large stages			
A	1,668	18,000	150 x 120 x 40 ft
B	1,115	12,000	100 x 120 x 40 ft
C	1,668	18,000	150 x 120 x 40 ft
D	1,115	12,000	100 x 120 x 40 ft
H (silent)	2,660	30,000	250 x 120 x 45 ft
J	1,394	15,000	150 x 100 x 40 ft
K	1,115	12,000	120 x 100 x 40
R	948	10,200	85 x 120 x 45 ft
S	929	10,000	100 x 100 x 45 ft
Medium stages			
G	629	6,768	94 x 72 x 24 ft
I	657	7,068	124 x 57 x 20 ft
L	604	6,500	100 x 65 x 24
W (silent)	966	10,400	80 x 130 x 34 ft
Small stages			
M (silent)	259	2,800	70 x 40 x 19 ft
T	261	2,814	42 x 67 x 24 ft

Water tanks:

Pinewood:

One external – 221 ft (67.4 m) narrowing to 105 ft (32 m) wide x 198 ft (60.4 m) long x 3.5 ft (1.06 m) deep; inner tank 51 x 40 x 7.83 ft (15.5 m x 12.2 m x 2.4 m); capacity 764,000 gallons; backing 240 x 60 ft (73.2 m x 18.3 m).

Five internal – in stage A, 40 x 30 x 8 ft (12.2 x 9.2 x 2.5 m); stage D, 40 x 30 x 8 ft (12.2 x 9.2 x 2.5 m); stage E, 40 x 30 x 8 ft (12.2 x 9.2 x 2.5 m); stage F, 20 x 20 x 8 ft (6.1 x 6.1 x 2.5 m); 007 stage, 297 x 73 x 8.83 ft (90.5 x 22.3 x 2.7 m)

Shepperton:

Four internal – in stage A (36 x 20 x 7 ft); stage C (36 x 20 x 7 ft); stage H (25 x 12 x 2.5 ft; stage can be flooded to provide available tank depth of 3.5 ft or 5 ft, width of 120 ft and length up to 230 ft); stage I (24 x 18 x 8 ft)

Reservoir: One in Pinewood 007 stage, 50 x 94 x 8.83 ft (15.3 x 28.7 x 2.7 m)

Backlot: *Pinewood:* As well as the mansion around which the complex is built, the backlot comprises acreage with service roads, other paved areas, buildings; formal English landscaped gardens with stocked lake, ornamental bridge and woodland area; orchard and paddock; complex is also adjacent to a heath and woodland area.

Production and post-production services available onsite:

Pinewood:

The studio itself provides a variety of production and post-production services: workshops; wardrobe and storage areas; dressing rooms; production offices; client areas and green rooms; labour and technical staff; construction equipment hire; vacuum forming; drapes; reference library; transport; office services and stores; sound editing; sound design; sound transfer; optical transfer; six sound recording theatres; over 40 film or non-linear cutting rooms available for rent; film storage and preview facilities.

Tenant service providers offer a range of production and post-production services: restaurant; cafeteria; two bars; catering; bank; medical services; crèche; dry cleaning; chauffeur service; car valeting; camera and grip hire; props and costume hire; set construction; marketing; computer animation and CGI; non-linear editing; answering service; insurance; feature film and television production and distribution, commercial production; telecine facilities and video services; music production, composition, supervision and copyright clearance; multimedia sound production; communications equipment; equipment for capturing, creating, editing and distributing digital media; computer playback and computer hire; high-definition production and post-production services; stock footage and newsreel libraries; executive search and recruitment services; travel services; décor, signwriting and silk screening services; software consultancy and

recruitment services; vehicle placement services; fire and safety consultancy; safety equipment and clothing hire; video duplication and distribution; special effects equipment hire; model-making; pyrotechnics; animatronics; events management; crew hire services; television program tracking and statistics services; training of art directors for film and television; lighting; climate, geography and location information services; completion guarantors; special make-up effects and prosthetics; accountancy services; freight services; carpentry and timber supplies; product placement; digital imaging; screenwriting; metalwork services; courier services.

The regional film commission, Screen South, also has offices on the Pinewood lot.

Shepperton:

Casting and crew agencies; catering; computing hire; set design, construction and materials; drapery; engineering; camera, lighting, grip and sound equipment hire; make up (including make up school); model making; visual effects; preview theatres; sound dubbing, recording and mixing; prosthetics and animation; special effects; video conferencing; freight services; signwriting; accountancy services; fire and safety consultancy; event management; supplies; transport; travel agency.

Recent international feature film productions:

Pinewood:

- *Die Another Day* (2002) Danjaq Productions (US)/ Eon Productions (UK)/ Metro-Goldwyn-Mayer (US)/ United Artists (US)
- *The Four Feathers* (2002) Belhaven Ltd. (US)/ Jaffilms (US)
- *Spy Game* (2001) Beacon Communications LLC (US)/ Red Wagon Entertainment (US)/ Zaltman Film (US)
- *Lara Croft: Tomb Raider* (2001) BBC (UK)/ Eidos Interactive (UK)/ KFP Produktions GmbH and Co. KG (Ger)/ Lawrence Gordon Productions (US)/ Marubeni Corporation (Japan)/ Mutual Film Company (US)/ Paramount Pictures (US)/ Tele-München [TMG] (Ger)/ Toho-Towa (Japan)

Shepperton:

- *The Mummy Returns* (2001) Alphaville Films (US)/ Imhotep Productions (US)
- *The Mummy* (1999) Alphaville Films (US)/ Universal Pictures (US)
- *Elizabeth* (1998) Channel Four Films (UK)/ PolyGram Filmed Entertainment (US)/ Working Title (UK)
- *Shakespeare in Love* (1998) Bedford Falls Productions (US)/ Miramax Films (US)/ Universal Pictures (US)
- *Portrait of a Lady* (1996) PolyGram Filmed Entertainment (US)/ Propaganda Films (US)

About the Screen Industry, Culture and Policy Research Series

The screen industries in Australia have been well served by high-quality research and information services established over some considerable period of time. They have underwritten policy development, provided government, industry professionals, journalists, students and the general public with accurate and well-organised data, and been highly regarded internationally. In addition, the industry is also served by lively journalism in periodicals and dailies.

However, there is a need for well-written and well-presented research which takes a longer-term perspective, and which addresses issues of direct relevance to those who participate in, analyse, commentate on, or study the industry. This Screen Industry, Culture and Policy Research Series is designed to address this need.

Each report in the series will review trends over a longer period or a wider framework than usual or possible in other information sources for the industry. Reports will bring substantial international comparative perspectives to bear on issues affecting the local industry. The series will seek to add value to debates central to the screen industries.

The series is a collaboration between the Australian Key Centre for Cultural and Media Policy, CIRAC (Creative Industries Research and Applications Centre) and the Australian Film Commission. Each has ongoing commitments to providing relevant research services to the industry and the community.

Other Titles in the Series



Broadcast in Colour: Cultural Diversity and Television Programming in Four Countries Harvey May

Since the 1970s, Australia has been portrayed in social, political and economic terms as a multicultural society. However, it has long been argued that cultural diversity has not been well represented on our television screens. Programs from the UK, US and New Zealand have tended to present a greater cultural diversity in the casting of television characters.

Broadcast in Colour moves beyond anecdotal evaluations and examines the casting practices in four countries: Australia, the UK, the US and New Zealand. The report also features an analysis of cultural diversity in Australian commercial television drama. The results demonstrate a marked improvement in onscreen representation of Australia's multicultural community over the last decade.

Explicit policies addressing cultural diversity on television have resulted in significant advances in the UK, US and New Zealand. The measures for ensuring the promotion of cultural diversity on television explored in each country offer the Australian industry and policy environment a number of possibilities for further improving cultural diversity on our screens.



Broadband Media in Australia - Tales from the Frontier Marion Jacka

Australia is on the cusp of broadband entertainment with emergence of broadband Internet content services via the computer and the introduction of digital television leading, potentially, to multichannelling and new interactive television services.

Marion Jacka's report explores the threats and opportunities posed by digital convergence for Australian audiovisual content providers. The report assesses progress with the establishment of new broadband entertainment services and the kind of content provided by these new services. It describes new media content development by established film and television production companies and by specialised new media companies.

The research represents the first comprehensive coverage of recent developments in new media

production in Australia. It draws on published Australian and international sources as well as interviews with key industry personnel in Australia.



Maximum Vision: Large-format and special-venue cinema **Scott McQuire**

In *Maximum Vision*, Scott McQuire analyses the increasing popularity of large-format and special-venue cinema and discusses the key issues facing these sectors in their quest for continued expansion. This is absorbing reading for anyone interested in the future of cinema.

- There is a growing interest in the commercial potential of the large-format medium, and a new endeavour to attract a broader audience to the giant-screen 'experience'.
- Image size and quality is at the heart of the appeal. This is both a strength and a burden.
- Beyond current debates about whether large-format production should be oriented towards 'education' or 'entertainment', 'documentary' or 'fiction' is a range of issues to do with the changing nature of LF exhibition and marketing.
- Other models for large-format exhibition include destination cinema for predominantly tourist markets and an emerging trend for multiplex developments which combine LF and mainstream. These developments reflect the growing importance of special-venue cinema, including 'film ride' simulators in theme parks and urban entertainment complexes.



More Long Shots: Australian cinema successes in the 90s **Mary Anne Reid**

In this sequel to *Long Shots to Favourites*, Mary Anne Reid profiles the financing, marketing and distribution of three successful Australian feature films of the mid to late 1990s:

- *Love and Other Catastrophes* was the quintessential 'low-budget/no-budget' feature. Its story is a cautionary tale as well as a guide to financing your own film.
- *Muriel's Wedding* was one of the 'event' films of the '90s. How and why does a breakout hit happen? It almost didn't in this case, says director P.J. Hogan.
- And through *Kiss or Kill*, Reid explores the viability of the 'specialist' release and the role of diversity in a robust national cinema.

Using interview-based case studies with the principals and their Australian distribution agents, Reid discusses the pros and cons of different financing models, along with the often arduous job of procuring distribution deals.

A fascinating and important book not just for filmmakers but for anyone interested in Australian cinema.

Contact the AFC or CIRAC for further information about the series.

