

Film Inquiry
Submission No. ...3t.....

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BEEPS Post Production / Visual Effects / Animation

**House of Representatives Standing Committee on Communications,
Information Technology and the Arts**

**Inquiry into the future opportunities for Australia's film, animation,
special effects and electronic games industries.**

Submission

June 2003

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1.0 Executive Summary

Development of clear strategies identifying areas for opportunity, growth, and customised communication & information solutions are essential for achievement of the goals specified by the film, animation, special effects and electronic games industry sectors.

It must be said though, that no amount of marketing and attraction of production will be of benefit for Australia unless cost effective infrastructure, education & training, and highly skilled people are present to support the demand.

Like most of the post production houses in Australia, BEEPS' core business centres around TVC's (local and international) and domestic longform production.

With over 23 years industry experience, BEEPS is reputed as one of Australia's premier post production facilities and believes that it is in the areas of new technology – VFX & animation; attraction of offshore production; and creative development with a VFX / animation focus that most of the growth and opportunities exist.

However for an industry extremely competitive in nature and heavily dependent on investment in infrastructure and capital expenditure, the major concern is affordability of new technologies.

The opportunity for all industry sectors presents itself in the cost effectiveness for acquisition of infrastructure (hardware and software); broadband (scale of needs); connectivity (access) in order to be globally competitive. It is only when these requirements are in place that Australian talent and companies can hope to compete on a level playing field with international competitors.

It is also through well developed fundamental foundations that creative areas of the business are best served. Opportunities exist in areas of development and investment (particularly projects with a VFX or animation focus); education and training (critical issue); research and development (software); people (global shortage); and ownership of the "idea" (intellectual property).

The sustainability of the Australian industry's success is to embrace and develop new technology. The key to this is in making access to new technology and infrastructure cost effective (connectivity, bandwidth); creating an environment for investment; and development of people (education and industry relevant training).

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Only by continuous monitoring of the Australian industry in relation to market demands, future needs, and its competitors can a model for action be developed.

If what has been discussed in this and similar submissions to the Committee in terms of recommended actions the industry could in fact expand and grow in the technical and creative areas with profound results such as:

- Growth and future opportunities for Australians
- Increased production - domestic, offshore and co-productions
- Reputation of talent, skills and products
- Financial benefits of production, employment and economic impact
- Creative development and control
- People – highly skilled, collaborators, renowned internationally
- Exports of unlimited value for productions, products, education and people

BEEPS in its submission will be addressing the terms of reference (c to h inclusive) in the specific areas of opportunity - Technical and Creative.

BEEPS is committed to the Australian industry and offers advice based on experience to the inquiry on existing opportunities and future directions for the industry.

2.0 Areas of Opportunity

2.1 Technical

The single biggest issue with technology is affordability. It is the cost of new technologies that affects access to and viability of the same to a business sector that is already heavily dependent on investment in infrastructure and capital expenditure.

The opportunity for all industry sectors presents itself in the cost effectiveness for acquisition of infrastructure (hardware and software); broadband (scale of needs); connectivity (access) in order to be globally competitive. It is when these requirements are in place that Australian talent and companies can meet and exceed industry demand.

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2.1.1 Infrastructure

The main issues affecting the post production visual effects and animation industry sectors are:

- new technology – access to and affordability
- future needs – ability to predict industry trends
- cost effectiveness
- requirements for moving large amounts of images and data

Development of models similar to Toronto and Sohonet's shared broadband network would potentially limit the impact of the above mentioned disadvantages and present Australia as a significant contender in meeting demand.

2.1.2 Broadband

The difficulty in recent years in forecasting post production needs (in terms of access / size / speed, etc.) has been bringing the varied parties (users and suppliers) to a mindset of developing a system dedicated to moving large amounts of images.

As FIBRE very clearly highlights in their February 2003 Report to DOCITA, the typical post production user does not represent a typical broadband user, but they are a critical user, with complex and difficult needs. These needs can be summarised as follows:

- entities are located from Far North Queensland to Perth
- access speeds vary from 256k DSL up to Gigabit Ethernet (for specific projects)
- some companies require connectivity internationally – with uploads significantly greater than downloads
- others have traffic patterns based predominantly on downloads
- the business is project based and therefore erratic, even sporadic, so long contracts and steep monthly costs cannot be sustained when between projects
- rushes for film or television that have been compressed to send at 5-15 Mbps, typically up to 30 minutes duration (i.e. 1.5 – 5.0 Gb file size)

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- high resolution special effects sequences with (up to) 15 Mb data per frame, typically up to 15-30 seconds duration (i.e. 5-10 Gb file size)
- audio replacement at data rates up to 2 Mbps, typically of several hours duration¹

Expanding the size of the connection does not seem to be the problem; it is getting the cable connected at a reasonable cost. Once the cable is laid and the facility is connected the "ramping up and down" is relatively straight forward.

2.1.3 Connectivity

Due to the potential of high speed connections globally, production companies don't have to actually shoot a project in Australia for Australian companies to benefit. BEEPS has been successful with completing VFX for the UK market where producers can take advantage of time zones, cost efficiencies, talent and creativity without leaving London.

Having said that it is still the prohibitive cost of installing cabling to facilities particularly in established areas that is of greatest concern. It is the laying of cable that has presented the biggest problem for suppliers.

For example BEEPS' has been quoted an amount of \$160,000 for laying the cable to the front door of its Brisbane facility. This amount is not conducive to the nature of BEEPS' business as it cannot be realistically on-charged to one project or client, yet it is a necessary tool in servicing the particularly growing offshore market.

BEEPS exports its services to USA, UK, Europe, India and Asia. And like most of its peers the local connections and interconnectivity between facilities is paramount for servicing domestic clients.

There needs to be viability in the cost of supplying the network to all participants.

¹ FIBRE Report to Department of Communications, Information Technology and the Arts February 2003

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2.1.4 Global Competitiveness

The global market for post production, visual effects and animation is very competitive in terms of types and costs of products developed and services offered. Strategies need to be developed to tackle these issues to position (& maintain) Australia as a market leader.

Demand for connectivity is based on the realisation that much more of this work will come to or be retained in Australia if an appropriate network exists.²

Australia has many advantages that have been used in marketing and attracting business in whole or in part.

These advantages include:

- cost efficiencies – labour / products / services
- time efficiencies – time differences between markets
- exchange rate

However, Australian companies are disadvantaged by (and need to address) the following:

- need for continuous investment
- fast and efficient access to networks
- inconsistent access to bandwidth

All of these things combined affect Australian companies' ability to "win" work and deliver competitive goods and services. Thus limiting the growth of the industry and earning potential.

2.2 Creative

It is recognised that creative talent is not limited to only producers, writers and directors, but extends to a wide range of other fields involved in the production and post production process and the creation of visual effects...all of these skills have benefits for foreign and co-productions as well as domestic production.³

² FIBRE Report to Department of Communications, Information Technology and the Arts February 2003)

³ PFTC The Ideas Business: Integrating the Queensland Film Industry Into the Smart State February 2002

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It is through well developed fundamental foundations that creative areas of the business are best served. Opportunities exist in areas of development and investment (particularly projects with a VFX or animation focus); education and training (critical issue); research and development (software); people (global shortage); and ownership of the "idea" (intellectual property).

2.2.1 Education & Training

Australia through its high profile projects and people is developing a highly regarded reputation for its technical and creative talent.

The 2003 Ausfilm Guide states that over the last three to four years the number of producers taking advantage of the high quality of creativity and high level of technical expertise in Australian CGI companies has dramatically increased, but this overall talent base and capacity is yet to be fully exploited by overseas productions who want great quality at very competitive prices.⁴

The critical issue to be addressed so this can occur without damaging Australia's reputation is educating and training people with industry ready skills and experience. Imperative to any training and education in such a high-tech business is that it has to be delivered at a global standard.

2.2.2 Research and Development

BEEPS attends local, national and international trade shows as part of their research and development. These tradeshow are offset by individual meetings with suppliers of both hardware and software around the world. Australian companies and individuals need to be committed to continually resourcing its creative and technical teams to deliver exceptional results.

VFX and animation software is an area where it is important for Australian companies to retain the IP for these programs and plug-ins. This type of solution to software limitations has become a necessary part of the business as industry and consumer expectations increase.

⁴ Ausfilm The 2003 Ausfilm Guide to Feature Film, TV & TVC Production in Australia 2003

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It is quite often the case that these costs involved developing these solutions is not recouped initially but become essential to complete a project. It would be beneficial for this research and development work to be supported and retained in some way for commercial export purposes.

2.2.3 People

By collaborating within and across industry sectors, Australian companies stand a much better chance of successfully bidding on projects as "cooperatives" to attract large visual effects and animation jobs.

In order to attract highly skilled and experienced people to the industry (& Australia) and retain the locally developed talent you must:

- have a throughput of work to sustain staff levels
- pay attractive packages
- have ability to resource and fund experienced individuals
- have access to the latest technology and development

BEEPS like most visual effects and animation houses adopts a flexible approach to staffing. There are a stable of experienced supervisors who build their teams around the project's specific needs. In some cases specific people are "imported" from overseas for a particular skill or for particular software development. What BEEPS tries to do in these cases is encourage a mentoring environment for junior staff to benefit from having this level of expertise nearby (if only for a short period of time).

2.2.4 Intellectual Property

The resources required for software development and a project's creative development can be quite substantial in terms of managing and funding the process.

BEEPS by nature of its core business, is constantly researching and developing (both externally and internally) software. BEEPS has built a reputation for solving problems in-house by employing freelance software developers to develop specific program add-ons and plug-ins to improve the versatility of the process. Retaining the IP of such developments has created for BEEPS the opportunity to offer a significant range of solutions.

Therefore it is crucial to retain whole or partial control of the creative decisions.

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3.0 Recommended Actions for Consideration

3.1 Technical

The sustainability of the Australian industry's success is to embrace and develop new technology. The key to this is in making cost effective access to new technology and infrastructure (connectivity, bandwidth); creating an environment for investment; and development of people (education and industry relevant training).

3.1.1 New Technology

The only way to truly embrace and develop new technology is to make it (infrastructure, software & hardware) cost effective and accessible to all (companies and individuals large and small).

3.1.2 Infrastructure

It is recommended that any strategies concerning future directions of infrastructure be developed with the highest quality solutions in mind (rather than the most cost effective solution which is then quickly outdated or not practical).

A well developed film industry infrastructure can attract and then keep more of the whole production process, from early pre-production to post production, than one that relies on the uniqueness of its locations alone. The economic and employment benefits of this are substantial. The elements of infrastructure, which include a skilled workforce, well equipped facilities, supply and service companies, studios and post production houses, should ideally be "clustered" and work collaboratively as well as competitively.⁵

Sohonet and Toronto are two unique models that have successful in identifying growth opportunities; developing implementation and marketing strategies; and working collaboratively as an industry for cost effective infrastructure, yet competitively as individuals in servicing clients' needs.

⁵ Ausfilm A Bigger Slice of the Pie Report November 2000

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By lowering the costs of bandwidth and having a flexible approach to supplying (ramping up and down) bandwidth will encourage post production houses to access this new technology and enable the sector to compete more efficiently with their global competitors.

The network and connectivity systems must be seen as commercially viable for all participants, not just high end users.

It is imperative that these networks be developed not just with what is required presently, but what will be required in the next 5 - 10 years to meet industry demands (particularly to export markets such USA, UK, Europe and Asia).

3.1.3 Investment

Investment is required in additional studio space, crews and facilities...to remain competitive, otherwise film production opportunities will be lost and there is a risk that the production companies will relocate.⁶

Analysing and forecasting industry needs is imperative to maintaining market leadership and identifying future opportunities.

It is therefore imperative that particular attention is paid to ABS multipliers and the gathering of data relating to expenditure, jobs, economic impact etc of both domestic and international production. More particular attention needs to be placed on breaking the data and subsequent findings down into industry sectors. Given the fast paced and competitive nature of the industry it would be beneficial to conduct annual industry surveys. This will allow for more concise analysis and more realistic strategy development for the film, animation, special effects and electronic games industry sectors.

We believe that combined public / private funded organisations in the form of research centres, centres of excellence and FIBRE are necessary to promote and identify industry needs, encourage communication within and between industry sectors and develop schemes for R&D with the "whole of industry" rather than many individual companies approach to improving Australia's performance and delivery services.

⁶ PFTC The Ideas Business: Integrating the Queensland Film Industry Into the Smart State February 2002

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There is still much to do in relation to FIBRE and its objectives:

- (a) to lower the costs of bandwidth for the film and television post-production sector, thereby making the industry more efficient locally and more competitive internationally; and
- (b) develop and implement, to the extent possible, the operation of a commercially sustainable broadband network for the film and television post-production sector with local, intercity / interstate and international connections⁷

It could also be the role of these type of organisations / centres of excellence to address the issues of lack of Venture Capital companies' involvement in the film, animation, special effects and electronic games industries; fragmented communication between sectors; and systems to commercialise innovation.

3.1.4 Education & Training

Firstly a National skills audit needs to be completed to truly gauge and identify needs across Australia's film, animation, special effects and electronic games industries.

This could be further developed in line with current national accreditation system to enable people to gain recognition for industry based experience and prior learning.

There has been much debate about certificates and degrees versus hands-on industry experience. That discussion will continue for sometime yet. In the meantime however, education providers must meet industry needs & standards. This can only be done by on-the-job practical experience.

It would be beneficial for the film, animation, special effects and electronic games industries to work together with private, State, and Federal education and training organisations / bodies to develop models where training was largely hands-on and perceived by industry as formal for accreditation purposes.

⁷ FIBRE Report to Department of Communications, Information Technology and the Arts February 2003

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It is imperative that any education and training services strive to meet or exceed international standards (industry demands and deadlines). Therefore both public and private institutions must be resourced with the industry standard hardware / software and instructors so that graduates are being educated at the highest level.

It is also important that the skills are acquired over a range of disciplines. In fact knowledge of VFX / 2D & 3D animation for all filmmakers would establish a scope for the whole process and prove advantageous for developing projects with VFX / animation components. It is also recommended that industry professionals be involved in the selection of students so that only the "best of the best" be recruited.

3.2 Creative

Paramount to supporting the technical needs of the industry is the development and nurturing of the creative process of the industry.

The successes to date could be further enhanced through retaining control of projects and ideas (intellectual property); fostering a collaborative environment; a national marketing strategy; and an incentive program to guarantee a level of demand for these creative skills.

3.2.1 Development / Investment

As an extension of the creative process it would be beneficial to develop projects with a VFX / animation focus. This would come about by the writers, producers & directors working in a number of disciplines across the film, animation, special effects and electronic games industries in order to attract investment (particularly those vertically integrated for a commercial market).

3.2.2 Intellectual Property (IP)

Whilst the PFTC's The Ideas Business Report makes reference to Queensland, the vision to transform the Queensland Film Industry into a sustainable creative industry is no different to what we are discussing for Australia's film, animation, special effects and electronic games industries.

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This option focuses on doing more than just trying to catch up, but playing a major role in the global creative economy – the 'ideas business'. This approach looks to capitalising on the worldwide demand for content by investing in the creation of film ideas (intellectual property) that can be produced for film, television and new media and sold internationally – with the profits remaining.⁸

It is crucial to retain control of projects particularly those with a VFX / animation focus where vertical integration strategies could be implemented to take advantage of specific software and or hardware development / usage.

3.2.3 Collaboration

It is necessary to develop an environment to encourage collaboration between industry sectors both domestically and internationally. BEEPS believes much of the enhancement for such collaboration comes from regular communication and mutuality.

It would be useful to audit what Australia's capacities are in terms of realistic outputs. Once this is known then a collaborative strategy can be developed in marketing the capabilities and encourage companies to work together on projects whilst also avoiding the "boom bust" cycle of gearing up with equipment and personnel.

As a result of collaborative approach across the industry sectors, a better understanding of infrastructure demand, broadband access, and connectivity issues will also be addressed thus strengthening the industries position with marketing itself, meeting client needs, cost efficiencies, and improving strategic planning and forecasting future growth and opportunities.

World class technical recognition of the post production, visual effects and animation sectors is important for Australia and any achievements in these sectors should be marketed and celebrated to stimulate interest in the sectors, attract production, further develop industry standards and connect with potential people / service and education providers as the "place to be".

⁸ PFTC: Integrating the Queensland Film Industry into the Smart State February 2002

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3.2.4 Marketing

There exists an opportunity to develop a strategy to encompass all industry sectors and their requirements to meet future needs. These strategies need a national focus like the very successful Australian Wine Industry model that may offer some solutions to meeting the broad needs of the various industry sectors.

What is required is an industry approach to overcoming issues by developing strategies which met the needs for representation domestically and internationally.

This could be further developed by a joint marketing plan to clearly identify marketing strategies; look for joint opportunities; and create a mutually beneficial alliance that is both commercial and features real outcomes for all stakeholders.

3.2.5 Incentives

If Australia wants to remain competitive it must continually review its incentives.

The recently implemented Federal Tax Offset has already kicked started renewed interest in not only shooting in Australia, but also completing post production here.

BEEPS has benefited from the Federal Tax Offset with its contribution to the visual effects component for George of the Jungle II. Had it not been for the rebate Walt Disney Pictures would certainly not have completed post production here in Australia.

The Federal Tax Offset has been the topic of much debate, mostly whether to extend the rebate to longform television series. Longform television series is paramount to sustaining the film industry as it offers longer periods of employment and training; maintains a throughput of work; and capital expenditure can be amortised over the number of episodes, making it a viable source of production and post production.

BEEPS would support the extension of the Offset to television series with budgets over \$1 M AUD per episode. This would generate growth particularly in the area of international television series being produced here.

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There has long been discussion about developing a specific post production / visual effects / animation incentive. Whilst BEEPS would welcome a strategy to grow the output, it also errs on caution if the necessary foundations are not in place to deliver what clients demand and expect.

By attracting offshore production the domestic industry benefits from not "normally" affordable / sustainable technology and experience.

In Ausfilm's A Bigger Slice of the Pie Report it suggests there is a mutually beneficial relationship between local film and TV production and international production. A regular slate of international productions can even out the well known ebb and flow associated with local film and TV production. It can transfer skills and introduce innovative managerial and organisational practices. It can provide an opportunity for ...post production talent to show what it can do in a wider stage...raising the bar on acceptable standards in skills-based areas by exposing the local industry to international comparisons.⁹

Regardless of what is on offer, no amount of marketing or attraction of production will be of benefit to Australia unless cost effective infrastructure, education & training, and highly skilled people are present to support / service the demand.

4.0 Outcomes / Results

Only by continuous monitoring of the Australian industry in relation to market demands, future needs, and its competitors can a model for action be developed.

Development of clear strategies identifying areas for opportunity, growth, and customised communication & information solutions are essential for achievement of the goals specified by the varied industry sectors.

⁹ Ausfilm A Bigger Slice of the Pie Nov 2000

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If what has been discussed in this and similar submissions to the Committee in terms of recommended actions the industry could in fact expand and grow in the technical and creative areas with profound results such as:

- The growth and future of Australia's film, animation, special effects and electronic games industries through embracing and developing new technology; retaining creative ownership in areas of products / software / people; and investment in intellectual property and project development.
- Increased production of both domestic and international production in Australia means more jobs; education / on-the-job training; continuity to retain both creative and technically skilled people; greater diversity of facilities and services; and revenue. More production fosters greater competition across all sectors of the industry with regards to services, delivery, cost, skills and time efficiencies, making it a sustainable business.
- Reputation and recognition internationally of skills and talent as a centre of excellence for technology and creative based industries.
- Direct and indirect financial benefits for Australia's film, animation, special effects and electronic games industries provides an important source of economic, social and cultural advantages providing investment, employment and opportunity in both the local and national economies.
- Creative sustainability will be achieved with more Australian developed and owned projects for film, animation, special effects and electronic games industry sectors.

This will focus on nurturing more writers, producers and directors and providing the financial and physical infrastructure to develop, manufacture and market those ideas. This will increase domestic production, providing on-going employment and generating more production personnel – which in turn will provide the capability to increase levels of foreign production. This approach will be complemented with additional infrastructure and resources to increase capacity for foreign production and thus achieving significant growth.¹⁰

¹⁰ PFTC: Integrating the Queensland Film Industry into the Smart State
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- People will be highly skilled technically and creatively. They will in turn be retained encouraging collaboration across the industry sectors.
- Exports of a truly commercial nature will present themselves for Australian products (projects, education, hardware and software), creative IP, and technical skills.

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