

Québec in North America / Le Québec en Amérique du Nord

Hollywood Northeast? North American Film Production in Québec

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This note examines Québec's participation in the North American film industry. In 2003-2004, the volume of film and television production was \$1,206 million. Foreign location production accounted for \$193 million of this amount.¹ Of the 105 foreign productions shot in Canada in 2003-2004, 93 originated in the United States.²

In Québec, film and television production contributes 32,990 direct and indirect jobs, while Ontario contributes 48,100 and British Columbia contributes 42,200. Of the 134,700 direct and indirect jobs generated by film and television in Canada, 51,800 were direct.³ The United States census reports that film and television production directly employs 153,000 in the United States and 88,500 in California.⁴

¹ Canadian Film and Television Production Association, *Profile 2005*. (www.cftpa.ca).

² Canada, Department of Canadian Heritage, "Study of the Decline of Foreign Location Production in Canada." (www.pch.gc.ca/pc-ch/sujets-subjects/arts-culture/film-video/pubs/Mar2005/index_e.cfm).

³ "Profile 2005".

⁴ Gregory Freeman, Jack Kyser, Nancy Sidhu, George Huang, and Michael Montoya, *What Is the Cost of Run-Away Production? Jobs, Wages, Economic Output and State Tax Revenue at Risk*

Hollywood du Nord-Est? La production de films nord-américains au Québec

Français : <http://cepea.cerium.ca/article346.html>

Résumé

La faiblesse du dollar canadien et de généreux programmes de crédits d'impôt ont contribué à créer une industrie du film prospère mais vulnérable au Québec, qui a généré 32 900 emplois au Québec en 2003/2004. Cette note décrit le fonctionnement de l'industrie nord-américaine du cinéma au Québec. Elle se penche sur les cas de Technicolor Services créatifs, une multinationale qui opère au Québec, et Muse Entertainment Enterprises, basée au Québec. Muse, Technicolor et leurs clients se sont installés au Québec en raison de la faiblesse du dollar canadien, mais aussi à cause du climat fiscal favorable. L'industrie québécoise dans ce domaine est techniquement concurrentielle et capable de produire des films de qualité semblable à ceux produits à Hollywood. La hausse du dollar canadien, l'apparition d'incitatifs fiscaux dans les États américains comparables à ceux pratiqués au Québec, le déclin des films produits pour la télévision et une hausse du protectionnisme dans l'industrie américaine du film ont mené à un déclin dans les productions étrangères filmées au Québec.

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As Figure 1 (next page) shows, film employment in North America is distributed among seven main centers, including three in Canada. The Canadian federal government provides two levels of production tax credits to film and television productions based on the amount of Canadian content in the production.

The first level of federal assistance is the [Canadian Film or Video Production Tax Credit](#) (FTC), a tax credit provided at 25% of eligible Canadian labour expenditures. Two types of productions qualify for this credit. The first is [Canadian Audio-Visual Certification Office](#) (CAVCO)-certified productions that meet Canadian content requirements specified in the Income Tax Regulations. The second is treaty co-productions; Canada has bilateral treaties with a number of countries that allow the application to the FTC to productions with significant foreign content. The Government of Québec provides a similar credit to Québec

productions at 29 percent of eligible labour expenditures.⁵

Québec's French-language film distribution market is distinct from that of the rest of Canada. Domestic films produced in English Canada are not generally distributed to the French market, and domestic English-language films are not popular in French Québec. In this sense, Canada has two domestic Industries, both of which benefit from tax credits. In this note, ‘domestic’ refers to film and television produced in English and French Canada.

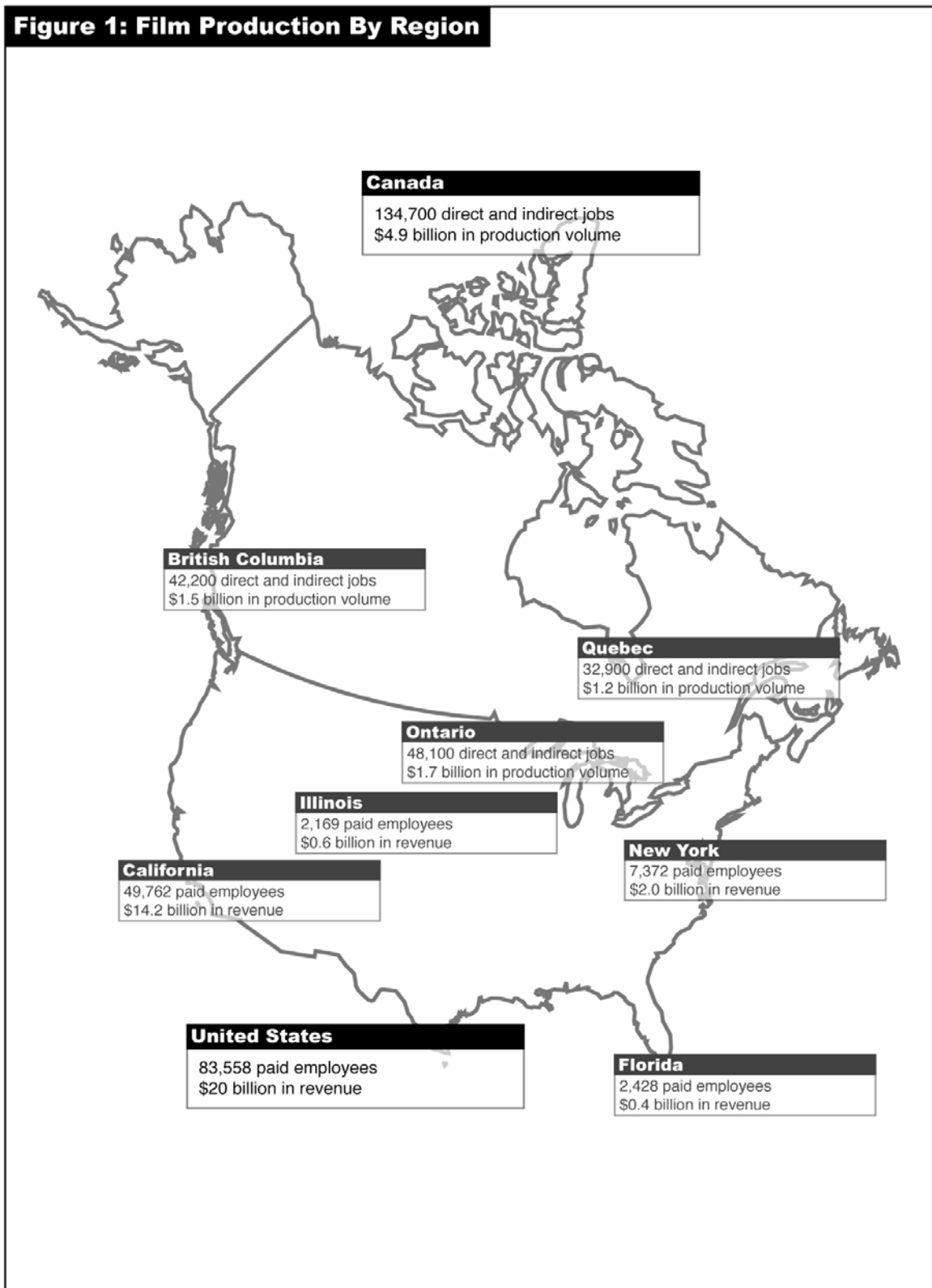
No co-production treaty exists between Canada and the United States. These types of productions qualify for the Film or Video Production Services Tax Credit (PSTC). This tax credit is provided at 16 percent of eligible Canadian labour expenditures to production corporations with a permanent establishment in Canada. Foreign location productions produced in Québec receive this tax credit. The Government of Québec provides foreign productions with a tax credit at 20 percent of the amount paid to employees who are Québec residents.

Technicolor Creative Services⁶

Technicolor's Canadian operations provide post-production services to North American film, television, audio and software projects. Technicolor does not provide services exclusively to domestic or foreign productions produced in Canada. Instead, the company's Canadian operations provide audio-visual services to a broad range of global audio-visual customers. The low operating cost, educated work force, and competitive government incentives available in Québec have compelled Technicolor to offer services not directly related to production.

⁵ Société de développement des entreprises culturelles, “[Refundable Tax Credit for Québec Film and Television Production.](#)”

⁶ Technicolor Creative Services is a division of Technicolor, Inc., a subsidiary of the Thomson group: www.technicolor.com.



Structure

Technicolor Creative Services is wholly owned by Thompson, a French corporation providing products and services to the media and entertainment industries. Thompson is a vertically integrated media company; one of its subsidiaries, Grass Valley Group, makes some of the production and studio equipment used by Technicolor.

Technicolor itself is organized into divisions based on the types of services it provides. Like any other production activity, film and television production can span national borders. Technicolor's structure reflects the components of the film production process located in Canada. Technicolor's services are divided into four categories and distributed to two locations in Québec, seven in the rest of Canada, three in Mexico, eleven in Québec and seventeen outside North America.⁷

Québec Operations

Technicolor has facilities in Montréal and Mirabel. The Montréal facility provides a wide range of distribution services, while the Mirabel facility is specialized in release printing, or the manufacturing of films after post-production. The current president of Technicolor Creative Services in Canada, Claude Gagnon, said in an interview that Technicolor's Québec activities account for 50 percent of the company's Canadian revenues and employs 550 people in Montréal.

Two related forces determine the types of services Technicolor has located in Québec. The first is the type and cost of labour in Québec, as well as the subsidies provided to Technicolor. The second is the location of Technicolor's customers and the services they demand.

Favourable Conditions in Québec

The forces that have attracted pharmaceutical and video game companies to Montréal and a Hyundai assembly plant to Bromont also act on Technicolor. General Motors estimates that Canadian health care saves the company \$1400 per auto assembled in Canada.⁸ Toyota's recent decision to locate a plant in Woodstock, Ontario, rather than in the U.S. South, was based on the savings produced by health care and on the degree to which Canadian workers are more educated than their American counterparts.⁹

These factors are more applicable to the film and television industry to which Technicolor provides services for two reasons. First, film, unlike automobiles and automobile parts, has little transportation costs. Indeed, film can be transferred digitally over the Internet. Therefore the geographic proximity that encourages North American car plants to set up in southern Ontario does not apply to Technicolor. The film and television industry is not as bound by geography as is the automobile industry; Hollywood does not have the same gravitational pull as Detroit.

The second reason why Canada's superior public infrastructure is of greater benefit to Technicolor is education—most workers in the automobile industry need only a high school education, but, as Claude Gagnon confirmed in an interview, film and television work requires a college or a university degree.

Technicolor's Québec presence proves that even before the advantages of a low Canadian dollar and competitive tax credits, superior and more universally available public services can attract desirable jobs.

⁷ Information on Technicolor based on personal interviews with company officials (For details on locations, see: www.technicolor.com/Cultures/En-US/Locations).

⁸ Dave Lindorff, "Why the Canadian Way May Be Looking Better and Better," *Treasury and Risk Management* 15.4 (2005): 38.

⁹ Paul Krugman, "Toyota, Moving Northward," *The New York Times*, 25 July 2005: A19.

Direct Provincial Incentives

The second force that has determined the services Technicolor offers in Québec is direct provincial government assistance. In 2002, the company opened a 125,000 square-foot, facility in Mirabel employing 275 skilled technicians and managers.¹⁰ This facility provides release printing services to Technicolor's North American customers. The facility represented a \$45 million investment for Technicolor.

Claude Gagnon said that financing assistance from Québec's provincial government played a decisive part in Technicolor's decision to locate in Mirabel. When the project was announced, then-Premier Bernard Landry announced that the facility was the first of a number of ventures with Technicolor's parent company, Thompson.¹¹

The Film Supply Chain

Although the digitization of film production and the increase in the importance of special effects is increasing the 'borderless' nature of the production process, physical distances still matter. Foreign location films produced in Québec often demand the services Technicolor provides. Technicolor provides dailies, or rough previews film crews use to examine their work while shooting.

Yet most of Technicolor's services are related to post-production and distribution. After a film is edited, special effects are added and audio is mixed. As a full-service post-production house, Technicolor offers all of these services. The company also provides services for distribution, the next stage of the production process. Technicolor provides marketing services, including the production of trailers, for the Québec market. Versioning, or the production of different versions of a DVD for different languages or markets, is also done in Québec.

¹⁰ Leo Rice-Barker, "[Technicolor builds 'world's largest film lab'](#)," *Playback Magazine*, March 5 2001, p. 7.

¹¹ Id.

Although the film production process is increasingly virtual, Claude Gagnon believes that Technicolor's customers come to Montréal for the low Canadian dollar and for the provincial and federal film tax credits.

Muse Entertainment¹²

Unlike Technicolor, Muse provides services directly to film productions. These services are related to the business of shooting a film in Québec, or to assistance with the film production itself. Service productions, or productions for which Muse provides its services but does not manage the production directly, include North American productions produced in Québec.

Service Productions

Muse has provided production services to notable recent North American productions, including *The Terminal* and *The Fountain*. Muse Director of Development Jesse Purpas estimates that 40-50% of the production company's revenue comes from these types of productions. For Purpas, participation in Hollywood feature films brings prestige to the company. As Purpas said, "it's those big projects which bring the stars to Canada and put our company on the map. By doing these projects, we've upped the prestige level."

Service productions qualifying for federal and provincial tax credits as foreign location productions can include Movies of the Week (MOW) and television series. Muse also offers production services to these types of projects.

Other Productions

Muse also produces original films, MOWs and television series for domestic and international markets. The company's control over, and success with, smaller projects is enhanced by its participation in larger films. As Purpas noted, "we're only as good as the last project we did."

¹² Company web site: <http://www.muse.ca>.

Muse's development from involvement in domestic television to MOWs through to feature film production for the North American market mirrors the history of the Canadian production industry. As the quality of the crews and equipment in Canada has increased, the industry has matured and added increasing amounts of value to the North American production process.

Vulnerabilities at Muse

Muse's reliance on foreign productions from the United States and MOWs makes the company a canary in the coalmine for trouble with North American film production in Québec. Whereas French production companies can fall back on domestic projects during decreases in the volume of American productions, Muse cannot. To address this weakness, Muse is currently trying to produce in English using Québec stars and is involved in television production for the Canadian market.

Explaining the Success of the Québec Film Industry

The low Canadian dollar, Québec and federal tax credits, and professional production crews are the foundation of Québec's film industry.

Low Canadian Dollar

Foreign location production budgets and revenues are stated in U.S. dollars. As Jeff Purpas noted, "the 80 cent dollar has had a major effect on the industry." A March 2005 Department of Canadian Heritage Study of the Decline of Foreign Location Production in Canada stated that "there are a multitude of factors influencing the downward trend in Canada, but likely one of the most important, from a pure economic standpoint, is the sharp rise in the Canada-U.S. exchange rate since 2003."¹³ As a result, an industry profile published by the Canadian Film and Television Production Association, l'Association des

producteurs de films et de television du Québec and Heritage Canada concluded that "the prognosis for service work is poor for all stakeholders."¹⁴

The Heritage Canada study notes that the Canadian dollar "still offers approximately double the value of the euro and more than one-third the value than the British pound sterling." However, production activity from the United States accounts for 95 percent of all international production in Canada.¹⁵ Foreign location production will therefore be vulnerable to declines in the Canadian dollar.

Quality Crews and Equipment

The quality of the production skills available in Québec determines the types of projects the industry can attract. Film and television productions require the same types of skills across different projects, and a balance of television, MOW and high-budget films provides the best means of supporting the province's film and television employees.

As American states and other Canadian provinces introduce competitive tax credits, Québec's competitive advantage depends increasingly on the skills of its crews. As Jeff Purpas noted in interview, while Louisiana only has one skilled film crew, Montréal has a dozen.

Tax Credits

In Claude Gagnon's view, "if there was no [provincial] tax credit, [Technicolor's] customers wouldn't come" to Québec. Purpas agreed, saying that "tax credits are hugely important to the industry". The combined provincial and federal tax credits are the

¹⁴ Canadian Film and Television Production Association, *Profile 2005*.

¹⁵ Neil Craig Associates. "[International Film and Television Production in Canada: Setting the Record Straight about U.S. Runaway Productions](#)," October 2004.

¹³ Canada, Department of Canadian Heritage, "[Study of the Decline of Foreign Location Production in Canada](#)."

highest among Canada's major production centres.¹⁶

However, 42 American states are currently offering competitive tax credits and are attracting foreign location productions away from Québec. The province's decision to increase its film tax credit in January 2005 has helped maintain its appeal to North American film productions.

New York State, one of Canada's biggest production competitors, introduced a 10 percent tax credit in 2004. New York City adds a 5 percent credit to productions shot in the city. The American federal government's American Jobs Creation Act allows for accelerated depreciation of certain production expenses in the United States. Illinois offers a 25 percent credit on labour expenses. Other American states offer credits on labour expenses, financing loans or tax exemptions.¹⁷

The Integration of Québec's Industry

Québec's audio-visual industry, from video and computer games through television to film, is integrated. The film industry itself is further integrated into the North American film production process. At the same time, whereas other industries are bound by logistics to locate close to one and other in clusters, digital film production is unbinding itself from geographic impediments. This new reality changes the possible ways in which investments in film production can be drawn to Montréal.

Film and Television

The film and television industries are integrated, and the development of a viable television industry precedes the arrival of big-budget domestic films.

¹⁶ Mark Dillon, "[Montreal Flies High Again at Oscars](#)," *Playback Magazine*, March 14, 2005, p. 13.

¹⁷ A complete list of competing tax credits is included in Heritage Canada's [Study of the Decline of Foreign Location Production in Canada](#)."

In 2002, a slump in television production led then-Montréal Film Commissioner André Lafond to warn that "for more regular employment for the technicians, we need the TV stuff and unfortunately that's where there's a crisis right now."¹⁸ Similarly, the increased popularity of reality television, and the lack of reality productions in Canada, has led to a decrease in MOW production in Québec.

Foreign location productions like *The Aviator* are important showcases for the skill of Montréal's film crews. Montréal Film Commissioner Daniel Bissonnette said that films like *The Aviator* "can be pretty significant in helping us promotion-wise. When we go to Hollywood, or when [U.S. producers] come to Montréal for scouting, they will ask about *The Aviator*. They will know what Scorsese said about Montréal."¹⁹

Big-budget foreign location productions attract smaller film and television productions. Television, in turn, provides the steady employment needed to minimize the effects of cyclicity and seasonality in film and television.

Film and Video Games

Tax credits have attracted an economically important video and computer game industry to Québec. The characteristics that have made Montréal a centre of film production and post-production have also benefited companies like Ubisoft. The skills and infrastructure required to design video games are often the same as those needed to include special effects in films.

The presence of computer and video game companies in Montréal is expected to play an increasingly important role in Technicolor's future. Claude Gagnon stated that there is currently very little interaction between game companies and Technicolor, but that "more

¹⁸ Kelly, Brendan. "Few projects migrate to the north," *Variety* (New York), September 2, 2002, p. A8.

¹⁹ Mark Dillon, "[Montreal Flies High Again](#)."

and more, our customers are starting to sell and publish games.” Gagnon believes that as game budgets and production requirements increasingly resemble those of films, Technicolor will be “the most experienced company in the world to provide technical services.”

Domestic and Foreign Film

Québec has a strong domestic film industry supported by high domestic box office revenues. This industry benefits from foreign location productions.

Québec's films receive 21 percent of Québec's French-language market, whereas Canadian English-language films earn 2 percent of Canada's box-office revenues.²⁰ *The Barbarian Invasions* (*Les invasions barbares*) and *Seducing Doctor Lewis* (*La grande séduction*), two French-language films, earned significant revenue in English Canada. This strong domestic industry benefits foreign productions in Québec in two ways. First, the domestic industry provides employment to crews during decreases in the volume of foreign productions. Second, successful Québec films such as *The Barbarian Invasions* are a showcase for the quality of Canadian productions. While *The Aviator* proves that the decision to shoot service productions in Montréal saves money without sacrificing quality, *The Barbarian Invasions* shows that Québec can control every component of the film production process and still produce internationally competitive films.

Domestic films benefit from foreign productions shot in Québec. The equipment purchased for high-end customers can be used with local producers. Gagnon believes that as a result, “Québec's customers expect the same quality they see in North American films. We can support local films because we're pushing technology.” This increase in quality improves domestic box office revenues, strengthening Québec's culture and improving its international profile.

Production and Post-Production

The public services available to Québec residents and its educated workforce give the province a competitive advantage in offering post-production services.

These advantages are leading major Hollywood productions to choose Québec post-production companies to participate in American productions, even when the level of Canadian involvement does not allow the production to qualify for Canadian or Québec tax credits.²¹ For example, Montréal's Hybride Technologies provided special effects for *Sky Captain & the World of Tomorrow* and *Sin City*, but the films were shot elsewhere.

Increasingly, films such as *Sin City* are spending more of their production budgets on special effects and less on shooting the film itself. These special effects are done digitally and are not as bound by the geographic constraints that apply to typical supply chains. As post-production takes increasing amounts of film budgets, physical distances will matter less and the borderless, virtual potential of films will increase.

The Future

Foreign location production dropped 50 percent in 2003-2004.²² Telefilm Canada executive director Wayne Clarkson remarked that “building an industry based on foreign production is like building a house on quicksand.”²³ Québec's and Canada's production special interest groups are pushing for greater protection and support of their domestic film and television industries.

As the federal and provincial governments raise the tax credits available to foreign productions in Québec, the difference between the economic spin-offs and the forgone tax revenue will decrease. The political benefits of supporting the film industry and, uniquely to

²⁰ Matthew Hays, “[Quebec Producers look to international markets.](#)” *Playback Magazine*, May 9, 2005, p. 2.

²¹ Mark Dillon, “[Montreal Flies High Again.](#)”

²² Canadian Film and Television Production Association, [Profile 2005.](#)

²³ Id.

Québec, the cultural benefits to the domestic film industry, will continue to strengthen the case for competitive incentives. However, the potential for Québec to specialize in specific parts of the film production process argues for different types of incentives that are more focused on those areas where Québec has a competitive advantage.

Québec's strong and distinct culture makes a viable domestic industry possible, but this industry will complement foreign productions. Domestic films are the bedrock on which foreign productions can be built. Québec's uniquely stable domestic industry will give the province an advantage in competing for foreign productions against other Canadian provinces and American states.

At the same time, the province's growing post-production and video game industries can make the province a centre for value-adding audio and visual activities. Post-production is as environmentally benign, high-paying and high-education as shooting, but it is not as seasonal. Success stories like *Hybride* and large investments from Technicolor indicate the potential for this industry in Québec.

Film production is at the intersection of technology, entertainment, culture and business. Québec's continued success in the industry depends on its ability to exploit that which makes it unique.

Conclusion

Québec's participation in North American film production has economic and cultural benefits. The equivalent of 39,200 full-time Québec jobs have been created by the film and television industries. In the rest of Canada, 39% of full-time equivalent jobs in film and television production are created by foreign location productions.

Hollywood Northeast? North American Film Production in Québec

Abstract

A low Canadian dollar and competitive tax credits have created a prosperous but volatile film industry in Québec. Film and television production in Québec generated 32,990 direct and indirect full-time equivalent jobs in 2003/2004.

This note describes the workflows of the North American film industry in Québec. It examines Technicolor Creative Services, a multinational film processing and distribution company with operations in Québec, and Muse Entertainment Enterprises, a production services company based in Québec.

Muse, Technicolor and their customers have located in Québec because of the low Canadian dollar, as well as provincial and federal tax incentives. The industry in which they participate has become technically competitive, producing films of the same quality as those produced in Hollywood.

The rise of the Canadian dollar, the introduction of tax incentives in American states rivalling those available in Québec, the decline in made-for-television movie audiences and an increase in protectionism of the American film industry have led to a decline in foreign location production in Québec.

Québec also plays a strong role in post-production. The province's educated workforce and a low Canadian dollar have encouraged Hollywood productions shot elsewhere in North America to hire Québec companies for special effects.

Culturally, Québec's domestic film industry has benefited from the experience and equipment gained through participation in North American productions.



Québec in North America 
A project co-chaired by Stephen Blank and Guy Stanley, with the assistance of Pasquale Salvaggio



The *Québec in North America* project emerged from the presence of Professor Stephen Blank as a Fulbright Visiting Scholar at the Université de Montréal in 2004-2005. He co-chaired the project with Guy Stanley, with the assistance of Pasquale Salvaggio in the summer and fall of 2005. Project advisors were Michael Hawes, Executive Director of the Canada-U.S. Fulbright Program, Jean-François Lisée, Executive Director of the Université de Montréal's Center for International Studies (CÉRIUM), and Pierre Martin, Director of the Université de Montréal's Chair in American Political and Economic Studies. The financial contribution of the Canada-U.S. Fulbright Program and of the CÉRIUM (through a generous grant from the ministère des Relations internationales du Québec) is gratefully acknowledged.

Twelve students from HEC-Montréal, Université de Montréal, and Université du Québec à Montréal attended the project's seminars and prepared research papers. Guests at the seminar meetings included Albert Juneau (Québec Chamber of Commerce), Diane Wilhelmy (former Québec deputy minister of International Relations) and Konrad Yakabuski (Globe and Mail).

The picture of Québec in North America that emerges from these studies is that of a vibrant source of economic and cultural activity with an important presence throughout the continent. Québec is a major source and destination along trade corridors with New York and New England, and by far the largest Canadian supplier in an integrated North American electricity market. In 2004, Québec ranked sixth among countries of the world in terms of exports to the U.S. and fourth in the world as a destination for U.S. exports. Mexico is Québec's most important trading partner in Latin America. Québec is the fourth largest center of film production in North America, as well as the fourth largest biotechnology hub in North America.

The papers also illustrate hurdles that must be overcome as Québec pursues its integration within the continent. More generous provincial programs for biotech—especially Ontario—are eroding some of Québec's luster. The challenge of managing cross-border enterprises is also significant, as shown by the example of Quebecor World. Exporting presents additional issues since the tragic events of September 11, 2001. Some of these are illustrated in the paper on CLIC Import-Export. Taken together, these papers shed light on how North America is evolving as an economic zone. Although trade amongst companies

continues between Québec and the rest of North America, trade increasingly is occurring within shared networks, or within firms. In this context, the barriers to trade between Québec and the rest of North America are becoming barriers to common economic growth.

The bottom line is that North America is rapidly reaching the point where many economic problems are shared no matter where they emerge. This has obvious implications for public policy and for policy capacity, or the ability of North American governments to recognize and solve common problems.

“Québec in North America” Project Home Page:
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Alain-Michel Ayache, [*Exporter aux États-Unis dans le nouveau contexte de sécurité: l'expérience de CLIC Import-Export / Exporting to the United States in the New Security Context : The Case of CLIC Import-Export*](#), Notes & Analyses # 8.

David Descôteaux, [*Quebecor World et les atouts d'une plateforme nord-américaine / Quebecor World and the benefits of a North American Platform*](#), Notes & Analyses # 9.

Lauris Apse, [*Hollywood Nord-Est? La production de films nord-américains au Québec / Hollywood Northeast? North American Film Production in Québec*](#), Notes & Analyses # 10.

Rolando Gonzalez, [*Le Québec et le secteur de la biotechnologie en Amérique du Nord / Québec and the Biotech Industry in North America*](#), Notes & Analyses (forthcoming).

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Sandra D'Sylva, [*Le Corridor Québec-Nouvelle-Angleterre / The Québec-New England Corridor*](#), Notes & Analyses (forthcoming).

Notes & Analyses sur les États-Unis/on the USA

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10. Lauris Apse, [Hollywood Nord-Est? La production de films nord-américains au Québec / Hollywood Northeast? North American Film Production in Québec](#), (Note), « Le Québec en Amérique du Nord / Québec in North America », mars/March 2006.
9. David Descôteaux, [Quebecor World et les atouts d'une plateforme nord-américaine / Quebecor World and the benefits of a North American Platform](#), (Note), « Le Québec en Amérique du Nord / Québec in North America », février/February 2006.
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7. Linda Lee, Christian Trudeau et Pierre Martin, [Délocalisation outre frontière de l'emploi : mise à jour sur l'activité législative aux États-Unis](#) (Note), septembre 2005.
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2. Linda Lee, [Les politiques d'achat chez nous à l'américaine : le retour en force des lois « Buy American » aux États-Unis](#) (Note), septembre 2004.
1. Linda Lee, [Délocalisation outre frontière de l'emploi : le point sur l'activité législative aux États-Unis](#) (Note), juin 2004.