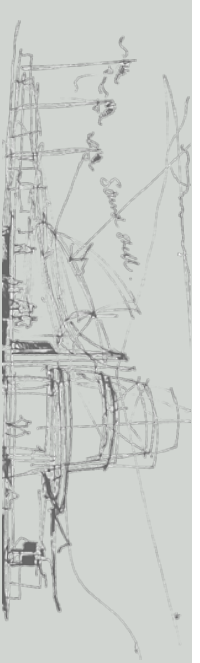


Risk analysis on overall use, type and distribution of infrastructure

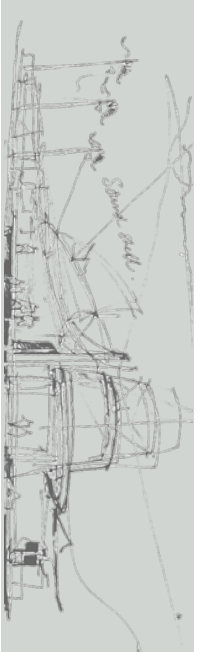
Through the course of the consultation process and subsequent workshops risks related to a lack of provision of effective screen industry infrastructure was identified and prioritised as High (H), Medium (M) or Low (L). Note the numbers in the left hand column are to enable identification of risks not a ranking.

Potential Risk	Ranking (H/M/L)	Impact on ScreenWest's Objectives	Action To Mitigate
1. Lack of local individual and skilled business to support the sector	H	Reduced skill base to support the sector. Reduced talent pool	Co-ordinated sector development approach to human resource development, production attraction and generation
2. Not having raw studio space	H	Ability to attract a sustainable level of production and employment activity in production and post production. Commercial activity would reduce. Higher budget films would not be attracted to Western Australia	Identify pathway to deliver the facility. Short term solutions to be identified in interim
3. Not having a sound stage to augment location requirements of productions	H	Reduced opportunity and competitiveness to attract production to the State. Higher budget films (\$15M- \$20M) would not be attracted to Western Australia Ability to attract a sustainable level of production and employment activity in production and post production. Commercial activity would reduce. Would limit the competitiveness of Western Australia in terms of international co-productions. Limit ability to tell local stories that have national and international significance	Identify solutions locally for \$15 million - \$20 million productions. Identify pathway to deliver the facility. Develop economic model to support funding and ongoing operations. Develop awareness of facilities for larger productions. Work with existing Western Australian studios to facilitate access and develop relationships with interstate and offshore facilities
4. Not having workshops and production offices including loss of Sunset Hospital site.	H	Critical to attract and support production. Reduced competitiveness. Lack of certainty for selecting production location	Identify pathway to deliver the facility. Identify short term solutions to provide space through commercial leasing or shared space



Potential Risk	Ranking (H/M/L)	Impact on ScreenWest's Objectives	Action To Mitigate
5. Lack of a regular flow of business opportunities	H	Reduction in employment for local resources. Reduction in Western Australian stories being told. Reduced production Brain drain and loss of experience with generational change	Higher levels of access to finance to incentivise production and long term business opportunities. Ensure creative development processes.
6. Lack of ability to attract scale content	H	Reduction in employment for local resources. Reduction in Western Australian stories being told Reduced production Brain drain and loss of experience with generational change	Higher levels of access to finance to incentivise production and long term business opportunities. Balance between capital funding and incentive funding Promotion/awareness of e tax offsets etc.
7. Lack of access to high speed and capacity data links	H	Network being developed and outside of ScreenWest control.	Ensure any facilities are able to access a high speed capacity network
8. Lack of funding for infrastructure	H	Ability to attract a sustainable level of production and employment activity in production and post production. Commercial activity would reduce. Higher budget films would not be attracted to Western Australia	Ensure an effective approach to funding and innovative ways to collaborate with private and public sector
9. Lack of funding for incentivising production and tax Incentives	H	Ability to attract a sustainable level of production and employment activity in production and post production. Higher budget films would not be attracted to Western Australia Reduction in employment for local resources. Reduced production Brain drain and loss of experience with generational change	Ensure an effective approach to funding and innovative ways to collaborate with private and public sector. Working with Government for an effective tax regime e.g. reduced payroll tax.
10. Lack of an identified hub or "cluster" of screen industry activity to create awareness and critical mass of sustainable business	H	Fragmented industry. Lack of a focal point Inefficiencies in terms of resource usage. Reduced collaboration and creativity.	Identify pathway to deliver the facility. Facilitate outcomes with stakeholders. Develop economic model to support funding and ongoing operations. Facilitate industry to develop informal hubs organically.

Potential Risk	Ranking (H/M/L)	Impact on ScreenWest's Objectives	Action To Mitigate
11. Lack of effective archival facilities and of awareness for the need and control of archival of product.	M/H	Lack of retention of screen industry output for future reference and monetisation	Identify pathway to deliver the facility including collaboration with existing archival facilities. Education and awareness program to ensure archiving is done
12. Lack of post production dry hire areas	M	Ability to attract a sustainable level of post production and employment activity in production and post production Commercial activity would reduce Higher budget films do post production elsewhere	Identify pathway to deliver the facility. Short term solutions to be identified
13. Lack of support (financial/mentoring) for locally initiated screen content	M	Reduction in skill development Reduction in employment for local resources Reduction in Western Australian stories being told Reduced production	Higher levels of access to finance to incentivise Incentivised mentoring program. Ensure creative development processes
14. Lack of "business" skills of screen sector	M	Lack of business skills to adapt to changes in technology, financing models, negotiations, contracting etc	Facilitate short courses for continuous learning with educational institutions
15. Lack of sustainable post production infrastructure	M	Reduced post production facilities Reduction in employment for local resources Reduced local production due to inefficiencies of remote suppliers	Higher levels of access to finance to incentivise production and long term Western Australian business opportunities.
16. Lack of engagement space for the public	M/L	Reduced awareness of the public in the screen industry sector Limited opportunity for consolidated information source for public, students, researchers etc	Collaboration with relevant stakeholders Collaboration with other Government agencies Identify pathway to deliver the facility
17. Skill development gap between University/TAFE and Industry	L	Reduction in skill development Reduction in employment for local resources. Brain drain and loss of experience with generational change	Facilitate short courses for continuous learning with educational institutions Incentivised mentoring program Work with West TV to provide outcome based production Encourage writers, producers and directors to live and work in Western Australia
18. Lack of a showcase theatre that could also be used for post production activity	L	Reduced post production facilities Reduced "showroom" opportunities	Utilise existing facilities



Recommendations

To ensure the achievements of the past are built on there needs to be a timely and effective response, in terms of human, built and technical infrastructure development, to the significant trends and structural changes happening in the sector.

There have been a number of previous studies that have addressed aspects that are further developed in this report. The majority of the infrastructure recommendations in those studies have not been addressed. Whilst the local sector has seen success in the level of production activity during that time it has not come with any greater level of sustainability for the sector.

This is a critical stage of the Western Australian industries maturity, developing the built, human and technical infrastructure needed to navigate the new media landscape will enable a fragmented WA sector to coalesce, share its knowledge and resources and effectively capitalise on the opportunity and improve its sustainability.

The recommendations, which have been developed through extensive stakeholder consultation, provide structured linked initiatives for supporting and growing the current industry while at the same time developing the next generation in a time of rapid structural and technological change. They Western Australia screen industry with a unique opportunity to take advantage of those changes through an integrated approach to the human resources, built infrastructure and technology requirements that will address the following key issues:

- Maintaining, sharing and building skills through collaboration, mentoring, creative hubs and education.
- Maintaining competitiveness and cost effectiveness in a challenging market through flexibility, technical awareness, best practice and effective production facilities
- Distinguishing ourselves from the rest through understanding and use of effective distribution and finance models, marketing and production and finance partners