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*A REVIEW OF THE
POTENTIAL FOR A
BROADCAST / COMMUNICATIONS CENTRE
IN WINNIPEG*

• FINAL REPORT •

*PREPARED FOR THE
DEPARTMENT OF COMMUNICATIONS*

BY COMMUNICATIONS MANAGEMENT INC.

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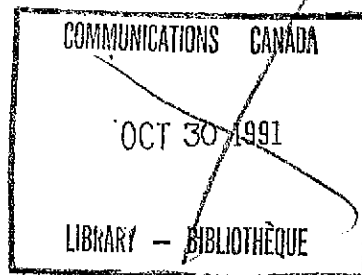
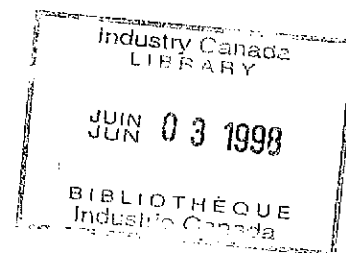


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EXECUTIVE SUMMARY

This study was commissioned by the Department of Communications, to review and assess the potential for a broadcast/communications centre in Winnipeg.

Based on a proposed new Winnipeg facility for the Canadian Broadcasting Corporation, it was envisioned that the broadcast/communications centre might also attract other facilities and users, including a major shared-use sound stage/production facility, a teleport, shared post-production facilities, and office space for related and ancillary companies.

This study examines a number of options for turning that concept into reality.

One set of options deals with costs and financing. For example, the new CBC facility could cost in the \$60-\$70 million range (including construction and equipment), and that might be financed all in terms of capital expenditures by the CBC, or in terms of some combination of capital and operating expenditures. In the context of financing, we have also discussed the availability of government assistance for certain components of the proposed centre, and the likely impact of the Goods and Services Tax on non-Canadian producers who might use the proposed production studio.

Another set of options deals with the other components that might become part of the proposed centre. The two components that are most clearly defined are the major sound stage/production studio and the teleport.

Another set of options deals with locations. One of the locations originally proposed was The Forks, but other locations might also be practical -- for example, the CN lands adjacent to The Forks.

And yet another set of options deals with the possibility of developing the proposed centre in phases. While the preferred option is to build the new CBC facility in the earliest

possible phase of development, it would be possible to use a phased approach, with the major production facility being built first.

The study also attempts to place the question of new facilities for production in Winnipeg into the overall context of the steps that can be taken to enhance the film and video production industry in Manitoba.

We believe that three key elements are required to accomplish that task:

- * Continued funding for production assistance;
- * Improvement of facilities; and
- * Strategic alliances with other jurisdictions.

In the latter case, we have noted the proximity to Minnesota, which is considered by officials in that state to be the fourth-largest film and video production centre in the U.S.

After considering all of these factors, we have reached the following conclusions:

1. The proposed facility would provide definite economic benefits to Winnipeg and Manitoba, in terms of growth and diversification.
2. The proposed facility can be built as a complete package, or can be developed in phases.
3. If a phased development is planned, the first phase could be the major production studio.
4. That studio should be operated by a private company, independent of the CBC.
5. With a commitment for use by the CBC for a set number of weeks per year, and loan assistance from the Western Diversification Program and the provincial government, the production studio appears to be in a "zone of viability".

We conclude the study by suggesting some "next steps" to help bring the proposed centre closer to reality.

1.0 BACKGROUND

1.1 Introduction.

This study was commissioned by the Department of Communications in March 1990, to review and assess the potential for a broadcast/communications centre in Winnipeg.

An important focus of the study was to be consideration of a proposal, first developed in 1987, to build a new Winnipeg facility for the Canadian Broadcasting Corporation. As outlined in the 1987 proposal, the new CBC facility was to be built at The Forks, and was to contain a major production studio/sound stage which could also be used by other film and video producers.

With the CBC taking the lead, it was envisioned that a number of other facilities might also locate in the same area, including a teleport, an animation centre, shared-use post-production facilities, and office space for related and ancillary companies.

Despite the clear attractiveness of the idea in general terms, and the fact that it would benefit the production community, and the Manitoba economy in general, the facility has not happened yet.

The main reason is cost. But a secondary reason is the fact that the original concept assumed that many shared-use facilities might be combined in one place, even though many of the potential users approached the facilities in different ways, and required different combinations of facilities.

Thus, the level of sharing that might be possible for one part of the proposed facility might not be possible for other components.

The main purposes of this study, then, are:

1. To determine which users might be involved with which components of the proposed facility.
2. To determine how costs might be shared and how

the project might be structured to make it as cost-effective as possible.

Thus, this study will focus more on how the various components might fit together, rather than on a detailed analysis of each component.

1.2 A location/participant matrix.

As the study progressed, it became apparent that:

1. The proposed location at The Forks was not necessarily the only location that might be suitable for the facility.
2. Each location carried with it a somewhat different set of potential participants, or different levels of participation.

Consequently, this report deals with five different potential locations (or types of locations) for the proposed facility, and indicates the plusses and minuses associated with each location.

1.3 Development in phases.

We would also note here that our analysis has indicated that, while the development of a multi-function facility anchored by the CBC would clearly be desirable and beneficial, it is also possible to approach the project on a phased basis, with some of the functions being built earlier than others.

Thus, we have added options for building the facility in phases to the location options, and the result has been a multiplicity of combinations of locations and facilities. While this has made the project more complicated than the original single-facility/single location proposal, it may also point the way to other options that will ultimately lead to the same beneficial result.

1.4 Industry and government consultations.

The research for this project involved a review of previous reports and documentation, as well as consultation with more than 50 individuals in private industry and in government. Their assistance is gratefully acknowledged.

In some cases, our discussions with private industry representatives touched on matters which should be kept confidential -- for example, the likely spending by a telecommunications user if a teleport were to be established in Winnipeg.

For that reason, we have chosen to provide summaries of industry views by industry category in this report, rather than directly identifying certain firms.

1.5 Financial estimates.

In a number of sections in this report, we deal with financial estimates, for such things as land costs, construction, etc. We would stress that the figures given are order-of-magnitude estimates, rather than precise costs.

Should the project, or certain phases of the project, proceed as outlined, private entrepreneurs will be negotiating for the purchase of land, for financing, and for tenants, and it is not our intention to attempt to predict the outcome of those negotiations, or to preclude other options.

We have therefore confined our estimates to ranges of costs, designed to indicate the potential for viability, rather than single, specific figures.

2.0 THE CONCEPTUAL FRAMEWORK

2.1 Putting the proposed facility in context.

In the last half of the 1980's, there was a significant increase in film production activity in Manitoba, due primarily to the activities of:

- * The Cultural Industries Development Office (CIDO), jointly funded by the federal and Manitoba governments;
- * The National Film Board; and
- * Telefilm.

The underlying principle has been to use government funds as a lever to attract private financing for film, video, and sound production.

Clearly, that kind of leverage will remain important, but it is not the only ingredient required to ensure the long-term health of the production industry in Manitoba.

Facilities are also important.

The right facilities can:

1. Help to keep in the province more of the dollars spent on local productions; and
2. Help to attract out-of-province productions to Manitoba.

In addition to government funding and the right facilities (infrastructure), we would also add one other ingredient to the list -- taking advantage of Manitoba's proximity to the fourth-largest film and video production centre in the United States -- Minnesota. We will comment further on the important and unique potential of the "Minnesota connection" in a subsequent section of this report.

2.2 Vision and mission statement.

As noted above, we see the development of the film/video production industry in the context of at least two, and poss-

ibly three main ingredients -- government financial assistance for production, improved infrastructure, and unique strategic alliances.

Thus, the general goal of any project of this nature would have the following mission statement:

1. To promote economic diversification and growth by developing a strong film, video, and sound production industry in Manitoba.
2. To help foster the growth of the production industry in Manitoba by providing the necessary infrastructure for that industry.
3. To make it possible to increase the "Manitoba content" of productions by providing or improving facilities located in the province.
4. To make it easier to attract non-local firms to do production work in Manitoba.
5. To strengthen Manitoba's position to enter into strategic alliances with other governments and private industry in other jurisdictions, with respect to film, video, and sound production.
6. To expand the opportunities for public and private broadcasters in Manitoba, and for their employees and suppliers.
7. To enhance the availability of the latest communications technology.

2.3 General description of the proposed facility.

As originally conceived, the proposed facility would be a new broadcast and administrative centre for the Canadian Broadcasting Corporation in Winnipeg, which would include a major sound stage/production studio. Since the CBC would only require the use of that production studio for about 20 weeks a year, it could be made available to private users when not required by the CBC.

Based on that original proposal, it has been suggested that a more elaborate broadcast/communications centre might be built. In a very general way, one might visualize a fully-developed broadcast/communications centre consisting of a number of connected or related buildings:

- * A new facility for the Canadian Broadcasting Corporation, which would include administrative offices and production facilities used for ongoing production work (e.g., news and public affairs).
- * A separate building containing a major sound stage/production studio, which would be used by the CBC for special productions, and by other film and video producers.
- * A teleport, which would combine satellite sending and receiving equipment with an office building for users and related companies.
- * Shared-use post-production facilities, which could be contained within the teleport's office building or could occupy a separate nearby structure.
- * An animation centre, which could also be part of the teleport's office building or could occupy its own structure.
- * Related and ancillary companies, attracted to the centre because of the other components.

In terms of size and costs, the total project has been seen as one that could involve a facility or facilities totaling approximately 250,000 square feet, including a 10,000 square foot sound stage/production studio.

The cost of construction (including land) has been estimated in the range of \$40-\$60 million, with the cost of new equipment for the CBC in the range of \$20-\$30 million.

Obviously, the actual cost will vary, depending on where the project is located, what components are actually included, and how each component is designed and built.

3.0 THE COMPONENTS

3.1 Introduction.

In this section, we provide brief descriptions of some of the main components that might form part of a broadcast/communications centre in Winnipeg.

We have combined these descriptions with comments based on the interviews, discussions, and other research conducted for this project. Thus, the description of each component may also contain comments on the likelihood of that component to be used by the private sector production community.

3.2 A new facility for the Canadian Broadcasting Corporation.

The current state of the CBC's facilities in Winnipeg has been documented in numerous reports, so we will not go into it in detail here. Suffice it to say that there is broad agreement that the current CBC facilities in Winnipeg are inadequate, both in terms of space and equipment.

At stake here is not simply a question of having "nicer" space or "better" equipment -- what is really at stake here is the ability of the CBC in Manitoba to fulfill its mandate within the province, and to put more made-in-Manitoba productions on the network across Canada.

In 1987, CBC Winnipeg produced a plan for a new facility, with estimated costs of \$48.5 million for construction and \$28.3 million for equipment, for a total of \$76.8 million. The cost estimates included engineering costs and technical installation, but did not include land.

The facility envisioned in the CBC's 1987 plan would have covered approximately 229,000 square feet (gross), with a net area of 175,000 square feet. The major shared-use studio was included in the planned facility.

In 1989, CBC's head office in Ottawa produced revised estimates for a new CBC facility in Winnipeg, based on a slight-

ly smaller building -- a gross area of about 198,000 square feet and a net area of about 160,000 square feet.

In 1989 dollars, the CBC's estimate for that building was \$38.0 million for construction, \$26.5 million for equipment, \$7.7 million for land, and an additional \$8.8 million of other costs, for a total of approximately \$81 million.

In its 1989 estimates, the CBC indicated that there might be "significant difficulties" with the concept of making a major shared use production studio a formal part of the CBC facility.

In terms of timing, the CBC estimated a four-year period from the time a construction contract was awarded to project completion. Obviously, the work required to get to the contract/construction phase could add another year (or even two) to that schedule.

It is beyond the scope of this study to second-guess the CBC on its estimates for land, construction, or equipment. However, the analysis might benefit from a further breakdown of costs by the CBC, to see if some of the components in the proposed facility could be built in stages or in a more simplified form.

Based on the CBC material noted above, we believe we can use the following order-of-magnitude estimates for the CBC facility for purposes of discussion -- a building of approximately 200,000 gross square feet, costing approximately \$40 million, plus approximately \$24 million for equipment. The land costs will vary with the location, and will be discussed in detail in a subsequent section.

For reasons that will be detailed below, we have not included the cost of the major shared use production studio in those estimates.

(In terms of the contribution that the CBC might make to any new facility from the sale of its current land and buildings, we would estimate their potential selling price in the

range of \$3.5 to \$6.5 million, with the most likely potential purchaser being the University of Winnipeg, which is located "next door" to the current main CBC building.)

3.3 CBC facilities in other cities.

The CBC has compared its proposals for consolidation of its facilities in Winnipeg with two other CBC consolidation projects -- in Regina and Vancouver.

The CBC Regina facility occupies approximately 180,000 gross square feet, and was completed in 1981. The CBC Vancouver facility occupies approximately 270,000 square feet, and was completed in 1975.

In Toronto, the CBC is currently building a major new facility -- it will occupy about 1.7 million square feet, at a construction cost of approximately \$350 million.

Indeed, it is generally accepted that now that construction of the CBC facility in Toronto is well underway, Winnipeg appears to have moved to the top of the list in terms of CBC facilities requiring renewal.

Despite that sequence, however, the development situation for the CBC in Toronto is quite different than in Winnipeg, and it is important to note the difference.

In Toronto, the CBC was fortunate to own a prime piece of land in a superb location. It was then able to invite proposals from private developers, and to enter into a set of lease-back arrangements with a private developer, in which the value of the CBC-owned land helped to underwrite the cost of the new facility.

The main difference between Winnipeg and Toronto, then, in this regard, is that the CBC had "land leverage" in Toronto, and does not have the same leverage in Winnipeg.

The current CBC-owned property in Winnipeg, if sold, would account for a relatively small share of the total cost of the new CBC facility. And, unlike the Toronto situation,

the CBC does not own any prime land elsewhere in Winnipeg.

3.4 Shared-use facilities.

The types of production-related shared-use facilities that might become part of any new broadcast/communications centre can be grouped into two general categories -- production and post-production.

A good general definition of production and post-production can be found in the 1987 book, Making It: The Business of Film and Television Production in Canada.

The book defines production as "the period of time during which the production is being put on film or videotape." It defines post-production as "the work done on a film after principal photography is completed; generally the editing, sound, music, mixing, and final lab work leading to the final answer print."

In our discussions with potential users of shared-use facilities in a broadcast/communications centre, there was a clear difference in the likelihood of shared use of production and post-production facilities.

There was an almost unanimous positive response to the need for a major sound stage/production facility in Winnipeg, from private broadcasters, from private producers, and from government agencies.

The response to the need for post-production facilities was less clear -- partly because many of the potential users have quite different post-production requirements, and partly because the television broadcasters (including the CBC) want to meet those needs in-house rather than through a shared facility.

Finally, in this regard, there appears to be general agreement that any shared-use component of such a facility should not be operated by the CBC itself, but should be operated by a third party.

3.5 A major sound stage/production facility.

Of all of the proposed shared-use components that might be included in a broadcast/communications centre, a major sound stage/production facility appears to meet the most needs and has the greatest degree of support in the broadcast and production communities.

There is general agreement on a number of parameters:

1. The facility should be owned by a third party, with the CBC, private broadcasters, and producers renting space as required.
2. The sound stage/production studio should be at least 10,000 square feet in size (about 100 feet by 100 feet, and at least 36 feet high).
3. There should be adequate supporting facilities.
4. There should be adequate access for trucks to service the facility.
5. The facility should be available for rental on a flexible basis, with those using it choosing their own crews, and either renting equipment or bringing their own (or some combination of both.)

In terms of use, the CBC has indicated a requirement for using such a facility 20 weeks a year, which is roughly 40 per cent of "capacity". (We would note that a studio of this type is normally booked in blocks of time for specific productions.)

The CBC sees the availability of such a facility as a way of improving the quality of its productions, and notes that it currently has to commit labour and time to converting other facilities for use as a major studio. Thus, a "rent-to-rent" comparison between the CBC's current practice and a new facility would understate actual current costs unless the full labour and time costs of converting a non-studio were included.

The private television broadcasters in the province all feel that a new production facility would attract users, but

were not in a position to be more definitive about a facility that might not open for a number of years.

One private broadcaster expressed concern about the potential for a new studio to be a competitor for Winnipeg studios currently rented out for commercial production. However, if the new studio is 10,000 square feet or larger, the nature of the productions it will attract will be substantially different than the kinds of work currently being done in much smaller studios in Winnipeg.

The private television broadcasters and independent producers we interviewed all reflect a very practical approach to the question of facilities -- they plan for, and work with, the facilities that are available. If better facilities can be made available, at competitive costs, then those facilities will also become part of the planning process for those broadcasters and producers.

One television station manager noted that, if a major production facility were available, the local station might then be in a better position to propose the production of programs in Winnipeg that would be carried on other stations under the same corporate ownership.

Another station manager saw the proposed facility in the context of productions that the station would commission from private producers.

For producers in general, and for film producers in particular, the question of doing production on location or in a studio is one that can only be answered by balancing the costs and availability of each option.

The 1987 book, Making It, discussed a number of the factors that are considered when deciding to shoot on location or in a studio:

"... the choice between studio and location is made on the basis of the availability of suitable locations, the dictates of the script, and cost."

While studios are not inexpensive, the book notes that they provide "freedom and flexibility" in terms of crew-scheduling, and the ability to build sets that allow for specified camera angles. The importance of "lock-up security" for the studio is also noted.

The book makes the following observation about filming on location:

"Location shooting, on the other hand, can cost you a great deal of money in travel expenses alone ... To this you must add the fact that logistical problems, both of production and support, are exponentially increased on location ... These and many other organizational complexities mean that location shooting stacks up quite poorly against the compact convenience of the studio."

Indeed, one local film producer, currently working on a production in the province, noted that the production required more than 40 locations, and that half of them could have been shot in studio had the contemplated new facility been available.

In an October 1989 report titled "The Development of Regional Film and Television Production in Canada", Paul Audley & Associates Ltd. reviewed the needs of Manitoba's production sector. The report noted the need for selective upgrading of post-production facilities, and then noted:

"Of more significance to the industry's development is the absence in Manitoba of adequate studio facilities. This has been recognized quite rightly as a priority ...

"... the expansion of Manitoba's infrastructure should be a part of any strategy for continued production growth."

Many of those interviewed for this study agreed that the presence of a major production studio would mean that industry

and government personnel from outside Manitoba would take the province's film-making community more seriously, and that such a facility would assist in attracting outside productions to the province.

3.6 Studio facilities in other jurisdictions.

It is difficult to make direct comparisons among studio facilities in different locations -- they differ in size, ownership, financing, and use. But it is still useful to note a number of facilities in other jurisdictions, in terms of their size, cost, and whether or not they received any contributions from government.

North Shore Studios in North Vancouver has been labelled the largest motion picture and television facility in Canada. The facility was created by U.S.-based Cannell Films, in partnership with a Toronto firm, ComWeb Entertainment. The facility is built on a 14-acre site, and has seven sound stages, of which Cannell regularly uses three. It cost \$23 million to build, of which \$4.5 million was raised in the form of a loan from the B.C. government. The facility opened in 1989.

In Edmonton, the Allarcom Studios opened in 1988. It is located near Allarcom's television station, CITV-TV. This facility totals 52,000 square feet, in a three-storey building. Included are a 15,000 square foot sound stage (100 feet by 150 feet), smaller studios, offices, and post-production facilities.

The Allarcom Studios cost between \$6 and \$7 million to build, of which \$1.1 million came in the form of federal funding from the Western Transportation Industrial Development Program.

Near Minneapolis, there is Paisley Park Studios, built in 1987 by rock star Prince, at a cost of US\$10 million. This facility is located on a nine-acre site (of which about three acres are currently being used). It contains a 12,000 square

foot sound stage (120 feet by 102 feet), plus other studios. (More details on this facility are provided in Section 5.0.)

3.7 The potential for a teleport.

We have held discussions with Telesat Canada on the potential for a teleport in Winnipeg, with particular emphasis on how such a facility might fit into a broadcast/communications centre.

Telesat defines a teleport as "a communications centre that switches voice, video and data communications to and from destinations primarily using satellite technology."

According to Telesat, a typical teleport would have three main components:

1. A satellite earth station complex;
2. A regional communications distribution system or local area network;
3. A related teleport business centre development.

Telesat believes that teleports can offer users reduced communications costs, greater reliability and security, and flexibility for future expansion.

Telesat's Téléport de Montréal, opened in 1987, is an example of a successful teleport development. It includes a technical facility owned by Telesat, and two commercial office buildings developed in co-operation with a private developer.

The complex houses a number of broadcasters, and also contains studios and post-production facilities.

Telesat has also established, or is currently working on, teleports in Toronto, Vancouver, Calgary, and Edmonton. In Telesat's view, Winnipeg is likely next on the list, in terms of the size of the city and current satellite usage.

Depending on the type of development to which the teleport is connected, it is possible that Telesat might consider acting as a co-developer for at least part of the project.

In addition to the obvious commercial considerations,

there are three issues of importance to Telesat in its consideration of establishing a teleport in Winnipeg:

1. A change in the current policy of the Manitoba Telephone System with respect to interconnection.
2. The ability to locate the teleport near major users, and/or the ability to co-locate with a major user (like the CBC).
3. The ability to co-ordinate the design of any related office structure with the location of the satellite earth stations, to minimize interference.

In terms of commercial potential for a teleport in Winnipeg, we would note that the CBC is already a major user of Telesat facilities.

We have also discussed teleport use with Winnipeg's major financial services firms. There was a generally positive response, with one firm indicating an immediate interest for specific applications, while others were less specific.

On the assumption that the federal and provincial governments can solve the interconnection issue, the key issue for Telesat will then be location, so that teleport users will be able to minimize their use of other carriers in accessing the teleport facility. We will discuss this further in Section 7.0, which deals with a number of potential options and locations for the broadcast/communications centre.

3.8 Other components.

As noted above, the need for shared-use post-production facilities was not as clear as the desire for a major sound stage, because of the fragmented nature of the types of post-production requirements, and because the broadcasters in particular prefer to keep post-production in-house.

It is important to understand this key difference between the potential for the sound stage and the potential for shared

post-production facilities. The sound stage, by its very nature, would be a facility capable of being transformed into the specific requirements of each user. Post-production, on the other hand, may take many forms -- each related to a specific technology. Thus, a film producer may shoot part of a movie in the production studio, and then require a 35-mm. lab for processing, while a television station may shoot a program on videotape which is then edited at the station's own facility. The sound stage/production studio is able to serve both needs, but the post-production requirements are quite different.

According to government and industry sources, more than \$1 million a year in post-production work leaves Manitoba, with most of that work done in Vancouver or Toronto. But, given the fragmented and specialized nature of the work, it may not be feasible to do it all in Manitoba, certainly not at the current levels of production.

Nevertheless, there may be some potential for adding some shared-use post-production capacity to a broadcast/communications centre, provided that it is done prudently, and in the context of the requirements that may be generated by the new studio facility.

Thus, the key to future inclusion of post-production in any broadcast/communications centre will be the ability to expand the centre in the future.

Winnipeg has a world-class animation sector, and there have been a number of proposals over the years for government funding of an animation centre in the city. The National Film Board is in the process of starting such a centre, on a small scale, in its current facility. Depending on the availability of funding, such an animation centre could also be located within the larger broadcast/communication centre, and "expandability" would be an important issue for that, as well.

There are a number of sound recording facilities in Winnipeg, and it is not clear if there is any substantial market

to expand those facilities at this point, although some of the participants may find it attractive to be in the larger facility from a business location point of view.

By the mid-1990's, it is possible that **Winnipeg Videon** may be interested in locating its public access community television studio and related functions at or near the proposed broadcast/communications centre.

Unitel (formerly CNCP Telecommunications) may also be interested in locating part of its Winnipeg operations at or near the facility, although Unitel, like Telesat, is quite location-sensitive, in terms of proximity to its major users.

Finally, as in the case of the teleport in Montreal, there is some potential for leasing **office space** to firms and government departments and agencies that would feel it would be relevant and advantageous to be located in such a centre.

The key point is that not all of those other users would become part of the project at the same time. Rather, they are likely to migrate to the new broadcast/communications centre in phases, and that means that the ability to develop the centre in phases will be important.

4.0 LOCATIONS

4.1 Introduction.

There is a time-worn cliché in real estate, but worth repeating here: "There are only three things you have to know about real estate -- location, location, location."

As noted at the outset, the original CBC proposal in 1987 was to build the new facility at The Forks. However, after reviewing The Forks as a potential location, we have decided to expand the review to include five locations, of which The Forks remains one. We believe this provides a better array of options for government decision-makers and private entrepreneurs who may be interested in the proposed development.

In each case, we have provided a brief description of the location, estimated land costs, plusses and minuses of the site, and we have also indicated whether any special developer relationships may be connected to a particular location.

Four of the five locations are located in or near downtown Winnipeg, and those locations are illustrated on Map 1, on page 19A. The fifth potential site is simply labelled "suburban", and might be found in any number of suburban locations around the city.

4.2 Technical considerations.

Although beyond the scope of this study, we must draw your attention to a number of technical issues which will have to be resolved before a final decision is made on any site:

1. If the location is near train tracks, is there a potential problem with either noise or vibration?
2. If the location is near a major electrical transmission or transformer facility, is there a potential interference problem?
3. If the location is under an aircraft flight path, will there be a problem?

4. To the extent that a teleport is part of the project, then there must be clear line-of-sight for the satellite sending and receiving equipment.

4.3 Location 1 -- The Forks.

Map 2, on page 20A, provides a more detailed view of The Forks, and also of the CN lands adjacent to The Forks.

We have met with officials of The Forks, to discuss their views on the proposed centre, and how the centre might relate to The Forks' overall mandate.

From a conceptual point of view, it is attractive to consider placing a new communications centre at The Forks -- the new technology of communications at the historic meeting place. But there may be practical problems in locating the proposed centre at that site.

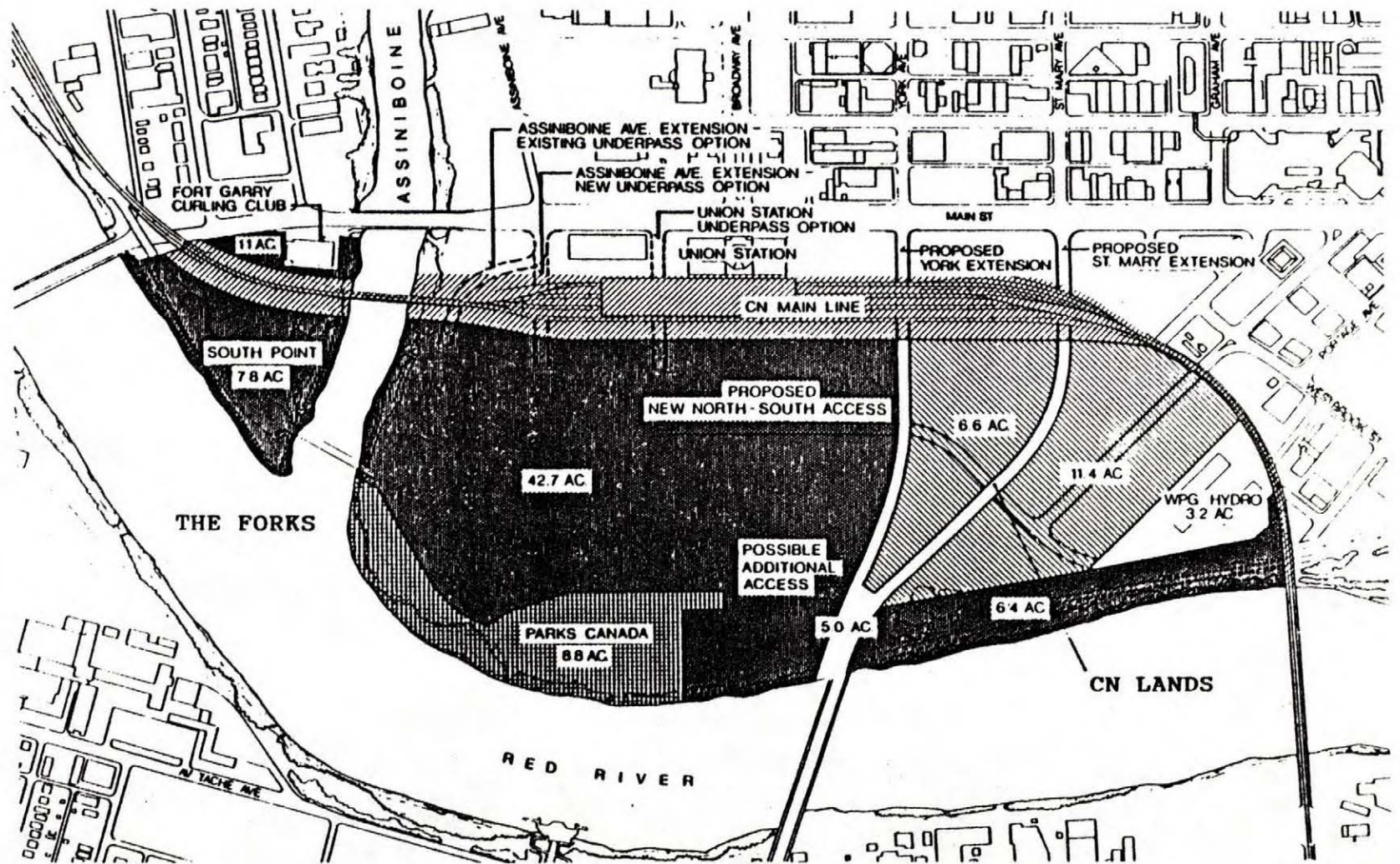
In terms of space, The Forks has indicated that 3.9 acres might be available for this project. It is no doubt possible to develop an acceptable plan to fit all of the major components on that site. However, one of the underlying rationales for such a project is that it should contribute to the growth of the industry and attract related enterprises. The Forks site appears to offer little room for future growth.

The Forks has a mandate to promote facilities that will be open and available to the public. While some of the functions in the proposed communications centre will lend themselves to that mandate, a number of them will not. Indeed, a number of the functions (the studio, the teleport) require the kind of security that would be quite different than a public participation mandate.





The production of a film or television program might best be characterized as light industry in pursuit of culture. Sets are built; trucks come and go. Does that really lend itself to a location at The Forks?

Clearly the answer to those questions will depend on how

Map 2. The Forks and the CN lands.



EAST YARD TASK FORCE STUDY
FUTURE LAND OWNERSHIP AND ACCESS

-  PROPOSED CN RETAINED LANDS (18.0 AC)
-  PROPOSED PUBLIC LANDS (58.0 AC)
-  PARKS CANADA LANDS (88 AC)
-  CN MAIN LINE



officials of The Forks choose to interpret their mandate, and whether more space can be made available at or near The Forks site. There is no question that The Forks site is ideal for those components of the project that would involve public participation, but the non-public components may have a larger role in the proposed centre.

The Forks did not provide us with specific land cost estimates. However, based on estimates for adjacent property, we would put the land costs at The Forks in the range of \$600,000 to \$1.2 million per acre.

Technical issues at this site include the railroad tracks and the proximity to a Manitoba Hydro facility.

4.4 Location 2 -- the CN lands north of The Forks.

To the north of The Forks, there is an 18-acre parcel of land which CN has retained for development purposes (see Map 2). A site of 6 to 8 acres in size could be made available by CN for a new broadcast/communications centre.

If the site is on the CN lands, then CN might be interested in becoming a developer or co-developer for the project.

We estimate land costs at this location in the range of \$600,000 to \$1.2 million per acre. Technical issues at this site include the railroad tracks and the proximity to a Manitoba Hydro facility.

4.5 Location 3 -- The Exchange District.

In the view of the general manager of the Winnipeg Core Area Initiative, there may be an interesting potential location for the proposed facility in or near The Exchange District, particularly that part of the district which is between Rorie and Lily Streets and the Red River (see Map 1).

That part of the district contains a mixture of buildings and vacant property, and may offer the opportunity to combine new technical facilities with offices in an adjacent older

building that could be up-dated and refurbished.

An attractive feature of this location would be the proximity to the city's main public performance facilities, including the Centennial Concert Hall, the Manitoba Theatre Centre, and the Pantages Playhouse Theatre.

Because of the possible mixture of land and existing buildings on this site, it is more difficult to estimate land costs in isolation, but they should in the same range as indicated for the first two location options.

Technical issues at this site include the line-of-sight question, since the site is close to, but north of, the tallest buildings in the city, and the satellite dishes have to face south.

4.6 Location 4 -- the current CBC location.

The CBC and the University of Winnipeg own almost all of the land in the block bounded by Portage Avenue, Spence Street, Ellice Avenue, and Young Street (see Map 1).

It would be possible for the CBC to make some of the land available to construct a studio facility, with the CBC then re-developing its own facility on the same site at a later date. While the site does not have as much room as some of the other options for expansion, there is ample availability of private property west of Young Street, and the development on this site might be the catalyst for a "production village" to grow up in the area.

However, there is one major impediment to CBC re-development on its existing site -- the complicated and costly transition that would be involved in transforming an old facility into a new one while continuing to operate.

In addition to the transitional question, use of this site would also have to be co-ordinated with the ongoing requirements of the University of Winnipeg.

4.7 Location 5 -- suburban.

There are numerous potential suburban sites for the kind of facility contemplated here. Land costs would be lower than in areas near the downtown -- from \$300,000 to \$600,000 per acre in prime suburban locations, down to less than \$100,000 per acre in industrial locations farther out.

Railroad tracks, flight paths, and Manitoba Hydro facilities could all be technical issues, depending on the location selected.

5.0 THE MINNESOTA EXPERIENCE

5.1 Film and video production in Minnesota.

As part of the research for this project, we have held discussions with industry and government personnel in Minnesota. According to state officials, Minnesota is today the fourth-largest film/video production centre in the United States, with estimated 1989 revenues in excess of US\$150 million. Most of the activity is centred in or near Minneapolis.

One of the major contributors to the success of the area in this field has been the construction of Paisley Park Studios, built in Chanhassen (near Minneapolis) by rock star Prince.

Paisley Park was completed in 1987, at a cost of US\$10 million. It currently uses about 3 acres of its total 9 acre site, and contains a 12,000 square foot sound stage, as well as other, smaller, studios.

According to a Minnesota government official:

"Until Paisley came along, there wasn't a focal point. It was basically an invisible industry, spread out through small boutiques. When Paisley was built, it immediately created an image that the business was serious here."

Obviously, the Minnesota experience cannot be transferred directly to Manitoba. The Minnesota market is much larger, and there is a much stronger base in the advertising industry and for the production of industrial films.

Yet the role of the studio in acting as a focal point for the industry there is important to note. And it is also important to note that, despite its success, Minnesota still encounters some attitudinal resistance from parts of the production community in Los Angeles and New York.

The Minnesota outlook, then, is shaped by many of the same factors that have shaped the Manitoba outlook.

5.2 The Minnesota Film Board.

The main co-ordinating agency for film and video production in Minnesota is the Minnesota Film Board, which receives a major part of its budget from the state.

The Minnesota Film Board works closely with the City of Minneapolis Office of Film, Video & Recording, and with the City of St. Paul.

The Minnesota Film Board has an active board of directors, drawn not only from related industries, but from the business community in general. It sees its role primarily as one of liaison and co-ordination, and does not offer funding in the same way as CIDO would in Manitoba.

The board also is the Minnesota agency that would deal with similar agencies from other states (or provinces), in developing more co-operation among jurisdictions located in the centre of the continent.

In fact, a recent meeting of film office personnel from mid-continent states was held to discuss just what might be done to increase co-operation among jurisdictions with similar outlooks and similar problems.

5.3 The potential for co-operation with Manitoba.

In our discussions with industry and government personnel in Minnesota, we raised the possibility of developing regional co-operation programs involving Manitoba and Minnesota, and we received a positive response.

This issue will be dealt with in greater detail in Section 8.0.

6.0 FINANCIAL CONSIDERATIONS

6.1 Introduction.

In this section, we bring together a number of the cost estimates dealt with earlier, in order to discuss how the project may be financed. A number of options are presented, ranging from construction of the entire project at one time to construction in phases.

This section also contains background information on the potential for assistance from the Western Diversification Program, and a discussion of the possible impact of the introduction of the Goods and Services Tax on out-of-country firms that want to do production in Canada.

6.2 The potential for government assistance.

In our review of production studios in other locations, we noted that one had received a loan from the provincial government, while another had receiving some federal funding.

In that context, then, it is useful to review the possibility of assistance from the Western Diversification (WD) Program. Western Diversification uses a number of criteria in deciding on applications:

1. WD cannot make funds available to crown corporations, so WD assistance directly to CBC is not possible.
2. WD usually makes funds available in the form of interest-free unsecured loans, with a flexible repayment schedule (perhaps starting three years after a project gets going).
3. WD is unlikely to provide such loans to what is primarily a real estate project, or if the effect is to provide an indirect subsidy to a tenant (like the CBC) based on the time-lag in starting to repay WD.

4. WD loans can be substantial, with \$10 million the maximum that can be advanced with ministerial approval; over \$10 million, Treasury Board approval is required.
5. WD assistance is intended for projects that already have significant financing in place -- it views itself as a "last-in" source, where its participation can make the difference between a project proceeding or not.

Given the potential contribution to increase production work in Manitoba, to add export opportunities, and to enhance the introduction of new technology, a new production facility in Winnipeg would appear to fit well within the mandate of the Western Diversification Program.

In addition to the Western Diversification Program, some assistance may also be available from the Manitoba Government, through the Department of Industry, Trade, and Tourism. Although the department does provide grants in a limited number of cases, provincial assistance would be most likely to take the form of a loan with an interest-forgiveness feature.

6.3 The impact of the Goods and Services Tax.

The new Goods and Services Tax (GST) is scheduled to take effect on January 1, 1991. The new tax will be applicable to film and video production.

One of the key issues raised by the tax will be its impact on non-Canadian producers who want to do work in Canada. This is most important for the production studio component of the proposed facility, particularly if we want to be able to attract production work from the United States.

In order to determine the GST status of such production, we discussed the issue with a senior official of the Goods and Services Tax working group in the Department of Finance.

Here is the scenario we used: A U.S. producer comes to

Winnipeg, uses the production facility for three weeks to produce a film, does some limited post-production work in Winnipeg, and then takes the resulting film back to the U.S. for final editing, mixing, etc.

According to the Department of Finance official, the GST treatment would be as follows -- the producer would have to pay the GST on the work done in Winnipeg, but would then qualify for a full refund of the amount paid, when the film is "exported" to the United States.

Thus, to the extent that the GST may be an issue, it appears to be an issue of paperwork rather than an issue of substance. Clearly, it would be in the interest of everyone who wants to promote Manitoba production facilities to make that paperwork as simple as possible.

6.4 Financial requirements for the CBC facility.

As noted above, we have estimated the cost of a new CBC facility in Winnipeg at approximately \$40 million for construction and \$24 million for equipment, not including land.

There is no "magic formula" to make those costs substantially different. We can express those costs either in terms of a capital cost, or in terms of rent required to maintain a facility built by someone else, or some combination of both.

Thus, the CBC might choose to finance the entire amount out of its capital budget, a total of \$64 million, plus land.

(It should be noted that not all of the funds would be spent in one year; in fact, the spending would be spread out over four or five years, based on the construction schedule and the schedule for purchasing and installing the equipment.)

If someone else builds the building and leases it to the CBC, then annual rent paid by the CBC would have to cover the cost of financing the building, plus maintenance (at least). At current interest rates, that could mean annual rent of about \$6.0 million (or more) per year.

Thus, in very general terms, the cost of building the CBC facility (exclusive of land costs) can be expressed in three ways:

1. A capital expenditure of \$64 million;
2. A capital expenditure of \$24 million for new equipment, and an increase in operating costs of about \$6 million per year to cover rent in a facility built by someone else;
3. No capital expenditure, and an increase in operating costs of more than \$9 million a year, if both the facility and the equipment were leased from someone else. (This third option may be unlikely, but we have included it for purposes of comparison.)

In terms of land, we have indicated the approximate range of costs for a number of locations. Depending on its approach to the facility itself, and the location chosen, the CBC could take a number of approaches to the land question. It could buy the land, and perhaps lease a portion to the private company that will build the studio, or it could lease land from that company under a different arrangement.

Clearly, if the CBC can be persuaded to commit the right combination of capital and operating funds, a new CBC facility would be the most significant way of anchoring a broader communications facility.

However, full CBC participation at the outset is not the only option, and two additional options are discussed below.

6.5 Other options.

We have already noted that the contemplated production studio will likely work best if it is owned independently of the CBC. We would also note that the studio can be used by the CBC even before the rest of the CBC facilities are located on the same site. Thus, it is possible to view the production

studio as Phase 1 of the project, and construct financing scenarios around a phased approach.

We would suggest two possible scenarios.

In the first, the CBC purchases a piece of land large enough to accomodate the entire project, but begins by leasing part of the land to the private company that wants to build the studio. The CBC would also then contract with that private studio for its required 20 weeks per year.

Under this scenario, the CBC would require capital funds of \$5 to \$8 million, and an increase in annual operating costs of about \$200,000 to \$400,000 per year.

The CBC could also structure the land lease with the private studio to have lower lease payments to the CBC in the early years, with those payments rising over time in a way that effectively reduces the net cost to the CBC of using the studio.

This scenario also gives the CBC "land leverage" in Winnipeg, for that point in the future when it is ready to consider proposals for a new facility.

The second scenario is even simpler. The CBC commits to the annual increase in operating costs required for the 20 weeks of production at the new studio, which can then be built by a private company in any number of locations.

In both scenarios, the CBC commitment to use 20 weeks a year at the production studio is one of the key ingredients in getting the studio built.

If one were to build a private production studio in Winnipeg totally dependent on private financing and private producers, it is unlikely that it would be viable.

However, if one is able to build the studio with substantial loan (and interest rate) assistance from the Western Diversification Program and the provincial government, plus the guarantee of 20 weeks worth of use by the CBC, then we believe that a major production studio, costing in the range of \$5-\$7 million, moves into a zone of viability.

7.0 COMBINING THE OPTIONS AND THE LOCATIONS

7.1 Introduction.

In this section, we have combined a number of the options for financing the project with a number of the locations, in order to discuss the impact of a phased approach on potential locations and potential players.

7.2 The Forks.

As noted above, there are a number of questions to be resolved with respect to the proposed facility and the degree to which it fits within the mandate of The Forks.

Assuming those questions could be resolved, a full CBC development at The Forks would clearly attract both a private studio company and a Telesat teleport.

If the project is done in phases, with the studio being Phase 1, it is not clear whether either The Forks or Telesat would be as interested. In the latter case, Telesat would have to be assured of some very direct way of serving the CBC, which would still be at another location.

7.3 The CN lands adjacent to The Forks.

If this land were to be used, CN itself might be interested in acting as a co-developer. CN's preference is for a relatively large-scale development, so the full CBC facility might be very attractive for them on this site.

The alternative of building Phase 1 only (the studio) might not be as attractive to CN, although that might change if the CBC purchased the land and indicated its intention to put its facility on that land in the future. That same indication might also motivate Telesat (provided, of course, that the question of connecting to the teleport can be resolved).

7.4 The Exchange District.

In this location, the land assembly for a major project may be more complicated in the short term than it would be at the CN lands site, since the land and buildings in the area involve a number of private sector and public sector owners.

However, this location presents some interesting urban renewal options, and the support of the Core Area Initiative may become an important ingredient at this location.

As with the other locations, a phased approach might cause Telesat to move more slowly on a full teleport, although at this location a teleport would be quite close to a number of the major financial services firms.

7.5 The current CBC location.

If space is sufficient, and if the transition question and the University of Winnipeg's requirements can be addressed successfully, then both the private production studio and the teleport might be built on land at or near the current CBC location.

In terms of the teleport specifically, we would note that the current CBC location might be considered too far away from other potential customers.

7.6 A suburban location.

Here again, the preferred option would involve the full CBC facility. If the project is to be built in phases, a clear indication of whether the CBC is planning to move to such a location would be required at the outset.

7.7 Assessing the options.

Our preferred option is the modified version of the original concept -- a new CBC facility as the anchor, with a privately-owned production studio that CBC would use, plus a Telesat teleport. If technical considerations do not pose a

problem, then our preferred location would be the CN lands adjacent to The Forks.

However, if it is not possible to proceed with the full CBC facility at the outset, we believe the production studio has such value to the future of the film and video production industry in Manitoba, that consideration should be given to a phased approach.

Our first choice for that phased approach would be the purchase of land by the CBC, at the CN lands site, with part of the land then being leased by the CBC to the private studio company.

Under this phased approach, the private studio could be completed faster than the entire project, and could be in operation in under two years. If the CBC owns the land on which the studio is located, and if the CBC has announced that that will be the site of its new facility, then the value of the project will be apparent, without the need to commit all of the funds at the outset.

In either case -- full CBC participation, or the phased approach -- the private studio should be able to qualify for assistance from the Western Diversification Program and from the Province.

8.0 OTHER INITIATIVES

8.1 Introduction.

As noted above, the question of improved facilities for production -- the infrastructure -- is but one of the ingredients required for the success of the industry. Government funding is another. And strategic alliances with other jurisdictions can be yet another.

This section deals with a possible strategic alliance, and discusses other related matters.

8.2 A strategic alliance with Minnesota.

We have already noted that Minnesota is the fourth-largest film and video production centre in the United States, and that government and industry officials in that state have indicated a willingness to discuss co-operative initiatives with Manitoba.

We believe that Manitoba should pursue this potential.

At a minimum, there should be increased promotion of Manitoba's capabilities to producers and the advertising community in Minneapolis/St. Paul.

But the initiative could go farther. Manitoba and Minnesota have signed a general agreement for economic co-operation. We would suggest that the two jurisdictions should consider signing a subsidiary agreement dealing specifically with film and video production.

If the new production facility is built in Winnipeg, and if Paisley Park Studios near Minneapolis are booked, then why should potential users not be referred to the facility in Winnipeg?

And if there is post-production work that cannot be done in Winnipeg, why should it not be done in Minneapolis?

This is not intended as a criticism of the quality of the work done in Vancouver or Toronto, but merely as a recognition

that there may be a greater potential for real co-operation and two-way sharing of work on a north-south basis, between Winnipeg and Minneapolis, than would be the case for either Minneapolis or Winnipeg in relation to their respective major centres of production.

8.3 Telefilm's U.S. Foreign Launch Fund.

One of the ways in which Manitoba's film-making abilities might be promoted in Minneapolis is through the release of Manitoba films in that metropolitan area.

We therefore note with concern one of the elements of Telefilm Canada's recently-announced U.S. Foreign Launch Fund, which is to provide financial assistance "to improve the promotion of Canadian film in the U.S. theatrical market" (as stated in Telefilm Canada's "Action Plan for the Administration of Telefilm Canada Funds, 1990-1991").

To be eligible for Telefilm assistance, the marketing plan must include release strategies for New York and Los Angeles, plus a majority of the following markets: Boston, Washington, Philadelphia, Chicago, San Francisco, Dallas, Houston, Seattle, Denver, Atlanta, Miami, San Diego and Detroit.

Minneapolis is not on that list, yet the Minneapolis/St. Paul television market is the 13th largest in the U.S., and is larger than Seattle, Miami, Denver, and San Diego, which are on the list.

We believe Manitoba film-makers should be concerned that the focus of the Telefilm program excludes the major city in that region of the U.S. which has the most in common with Manitoba.

9.0 THE BENEFITS

9.1 Introduction.

As we enhance the production capacity and activity in Winnipeg, a number of benefits flow to the city, to the province, and to the country. Those benefits are both economic and cultural, and we will deal with both areas below.

9.2 Economic benefits.

The development of a major shared-use production studio in Winnipeg will yield a number of economic benefits.

It will enhance the overall viability of the production industry in the province. According to the October 1989 Audley report, "for the fiscal year 1988-89, the direct and indirect economic output associated with independent production was \$19.4 million and the number of jobs created rose to 247."

In addition to enhancing the viability of the Manitoba production industry, the new facility would have the potential to attract productions to Manitoba, resulting in additional revenue and employment opportunities.

Manitoba's private television broadcasters currently employ over 200 people in programming-related functions; for many of those programming people, the new production facility would provide opportunities to expand their careers in Manitoba.

The construction of a new CBC facility could also enhance the role of the CBC within the overall network, and that could lead to more production activity for the CBC, or commissioned by the CBC, in Manitoba. CBC Manitoba currently employs over 400 people, and their salaries represent a significant contribution to the provincial economy.

The addition of a teleport to the proposed broadcast/communications centre will enhance the ability of Manitoba firms to access the latest in communications technology, and that

will help them to be more competitive nationally and internationally.

As each component of the proposed facility is considered, we can see that each of them will play a role in enhancing the economic viability of its sector, and then in providing a base for future expansion.

The independent production sector, the CBC, and private television in Manitoba together account for more than 1,000 jobs. Enhancing and expanding those jobs is an important goal and an important benefit of the proposed new facility.

Finally, in addition to those longer-term benefits, there would be the benefits to the economy that would flow from the construction process for each of the components.

9.3 Cultural benefits.

Cultural benefits are harder to quantify than economic benefits. Ultimately, however, they may be more important.

The people of Winnipeg and of Manitoba have something to say ... about ourselves, to each other, and to the rest of Canada and the rest of the world.

There is a Manitoba point of view. It deserves opportunities for expression. And facilities to turn that expression into the cultural currency of movies, television, recordings, books, or art.

As we expand and make more permanent the infrastructure for production in Manitoba, we enhance the opportunities for cultural benefits as well as economic diversification.

10.0 THE NEXT STEPS

We have established that there would be clear economic and cultural benefits to Manitoba from the development of a new CBC facility in Winnipeg, from the proposed new production studio, and from other facilities that would be attracted to the overall communications centre development.

We have also established that the CBC consolidation and the development of the production studio can be approached either together or in phases, depending on a number of variables.

What happens next?

We believe that two steps now are in order, and that they can be undertaken at the same time.

First, there must be a determination by the CBC and the Department on which of the options appears most practical for the CBC at this time.

And second, we believe the Department should invite either formal or informal expressions of interest from private entrepreneurs with respect to the development of the production studio.

Additional negotiations with Telesat, with the owners of the land at one or more potential locations, and with other potential participants, could then follow.

11.0 INDUSTRY AND GOVERNMENT CONSULTATIONS

On this page and the following pages, we list the people who were interviewed for this study. Their assistance is gratefully acknowledged.

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Mr. M. Balshaw
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Mr. Ted Benoit
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Mr. K.M. Bessey
Secretary to the Treasury Board
Government of Manitoba
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Mr. John D. Blackwood
Senior Representative
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(Mr. Blackwood is the former
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Ms. Dominique Bloy
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Mr. Gerry Huiting
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Mr. Kim Johnston
John Aaron Productions
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Mr. Brian Josling
President, Cantel West
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Mr. Jim Kacki
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