Building brand India through film tourism
January 2019
Foreword
I am happy that the PHD Chamber of Commerce and Industry (PHDCCI) is organizing the third edition of Global Film Tourism Conclave with the theme 'Transforming Location into Vacation' on 11 January 2019 in Mumbai.

The program is being supported by the Ministry of Tourism, Government of India.

India is incredibly beautiful. It is the ideal location to shoot movies, with its diversity and cost-efficiency benefits in terms of locations, skilled yet inexpensive manpower, local talent, etc. Film production can have a lasting impact on travel decisions, since it inspires people to see and experience screened locations first hand. This leads to an increase in tourism.

I congratulate the PHD Chamber for organizing this important conference where film makers, tourism boards and government officials could share their vision, knowledge and experience to formulate the roadmap for creating an incredible image of India in the foreign media.

I wish the initiative all the success.

K. J. Alphons
Minister of State (IC) for Tourism
Government of India
I am pleased to learn that PHD Chamber of Commerce and Industry (PHDCCI) is organizing the third edition of Global Film Tourism Conclave with the theme “Transforming Location into Vacation” on 11 January 2019 in Mumbai.

Films play a significant role in the promotion of tourism in various countries and different states of India. A film tourist is attracted by the first-hand experience of the location captured on the silver screen.

Not only is film tourism an excellent vehicle for destination marketing, it also presents new product development opportunities, such as location tours, film museums, exhibitions and the theme of existing tourist attractions with a film connection.

I hope that this initiative of PHD Chamber of Commerce and Industry will turn out to be fruitful for promoting and creating awareness about the untapped potential of film tourism in India.

I wish the program all success.

Yogendra Tripathi (IAS)
Secretary, Ministry of Tourism
Government of India
It is widely acknowledged that nothing unites India more than cricket and films. India boasts of over 100 years of cinematic history with a unique multilingual film industry spread across various states of the country. Being the country that produces the largest number of films in the world, India produced 1780 films in 2018.

Indian film industry achieved exponential growth of 27% in 2017 – both domestic and international. Coupled with increased revenues from sale of satellite and digital rights in recent years, gross realization from the film industry is expected to reach around US$3.7 billion by 2020.

I would like to acknowledge iconic filmmakers such as Satyajit Ray, Shekhar Kapur, Aamir Khan among others who have brought global acclaim to India. They have brought stories of the common man alive and connected masses across the subcontinent.

Currently, India is also gaining momentum as a film shooting destination, providing unexplored and mystic locations as well as generating employment and cultural exchange with local communities. After the success of India based movies such as Slumdog Millionaire, several international studios are considering shooting a large portion of their films in India due to availability of talented filmmaking crew and world-class production capabilities at highly competitive costs.

With its glossy and larger than life portrayal in the films, some of these destinations have successfully captured the imagination of movie goers and enticed them to visit the places where films were shot. In addition to the exposure provided through films, there are many ancillary gains to these destinations like income generation, investment and job creation, which all contribute to the national economic development. Benefitting from these, Indian tourism boards may encourage tourism to these locations.

Leveraging beneficial government policies and the interest of movie producers and audiences, this report by EY and PHD Chamber aims to bring forth innovative avenues that the industry could set forth upon for widespread collaboration and partnerships.

On behalf of PHD Chamber, I would like to extend my warm greetings and felicitations to those participating in the Global Film Tourism Conclave 2019 and wish it a great success.
PHD Chamber of Commerce and Industry (PHDCCI) is organizing the third edition of Global Film Tourism Conclave with the theme “Transforming Location into Vacation” on 11 January 2019 in Mumbai.

The program is being supported by the Ministry of Tourism, Government of India.

Film tourism is a growing phenomenon worldwide, fueled by both the growth of the entertainment industry and the increase in international travel. Film tourism sector has seen tremendous growth in the past few years. It represents a gateway to new and more intense ways of experiencing destinations. At the same time, it creates the potential for new communities by way of an exchange of insights, knowledge and experience among the tourists themselves.

PHDCCI is committed to create such meaningful platforms to do its bit in enabling all the parameters of the tourism industry to grow and flourish further!

We are thankful to all the stakeholders for their support and I wish the conclave a grand success.

Dr Mahesh Y Reddy
Secretary General
PHD Chamber of Commerce and Industry
The significance of cinema in today’s times has gone beyond its intended purpose of mass entertainment. Today, cinema is a portal for people to escape from reality and into their world of fantasy. Cinema has inspired individuals to fantasize about things they never dreamt of and has encouraged individuals to go ahead and live that fantasy. Cinema is a source of inspiration for some, a source of entertainment for some and a source of education for some. All in all, cinema plays a significant role in an individual’s life and in some form or manner influences their decision making.

It is not uncommon to see clothing and FMCG brands integrate their product in films or even launch brands, collections or special period offers co-branded with the film. The above concept is a marketing strategy adopted by leveraging the influential power of films on individuals.

Film tourism is a concept conceived from the influential value a film creates in an individual’s mind. Like the desire of an individual to wear the similar brand and style of clothes used by the lead cast, or use the products used by the lead cast, the idea of film tourism is to create a desire to visit the location portrayed in the film. There is a potential for upto a million film tourists which could result in revenues of upto US$ 3b by 2022.

The focus of this report is to bring out the benefits of films, on tourism in today’s world and portray films as a prudent investment choice to market a destination from a tourism perspective.

While the report covers the initiatives taken by central and state governments in India, it also throws light on additional steps which need to be taken to make film tourism more effective in India. In doing so, we have given examples of states and countries around the world where some of the best practices to promote film tourism are followed.

Thus, implementing these suggestions should not only make India attractive for Indian and foreign film makers to shoot but also serve as catalysts to reap the benefits of film induced tourism.

It is believed that collaborative efforts would be required on the part of the decision makers as well as stakeholders in the film industry. We hope the findings and suggestions will provide useful insights to those charged with taking up this challenge.
## Contents

**General overview of film tourism** 10
- Indian cinema in numbers
- Contribution of tourism to India’s GDP
- Concept of film tourism
- Film tourism and India
- Film tourism and Indian cinema
- Case studies

**Benefits of film tourism** 16
- Direct benefits
- Induced benefits

**Suggestions for promoting film tourism** 18
- Simplify administrative processes
- Incentivize film productions
- Promote filming destinations

**Way Forward** 30
- Introduction of film commissions
Indian cinema in numbers

The Indian film industry is one of the fastest growing sectors in the country today and has grown from INR122 billion in 2016 to INR156 billion in 2017, representing a growth rate of 28%\(^1\). Over the years, the industry’s revenues have grown significantly and the projected size of the industry is estimated to reach INR204 billion by 2019.\(^2\) The Indian film industry is one of the largest producers of the cinematographic films in the world with an annual certification of 2,336 films during FY15-16.\(^3\)

The contribution of tourism to India’s GDP

India, with its vast geographical and cultural diversity is an emerging hotspot for global tourists as it offers wide range of tourist attractions from the Himalaya to oceans. According to the World Travel and Tourism Council, India ranked seventh amongst 185 countries in terms of travel and tourism sector’s total contribution to GDP in 2017. The tourism industry in 2017 contributed 9.4% of the GDP and generated 8% of the total employment in the country, thus making it one of the largest industries in the services sector.

Several industry reports have shown a boom for the travel and tourism sector not only in India but also globally. As per a report by The Travel & Tourism Competitiveness Report 2017 by the World Economic Forum and a separate Motion Pictures Distribution Association India (Private) Limited report, it is estimated that an international tourist spends US$2,168 on an average in India and the average spend per tourist both domestic plus international in India is currently at US$1,500. Further, as per the said World Economic Forum report, travel spending will reach an average of US$5,305 a year per traveler by 2025—and that does not include costs spent before a trip, such as for an airline ticket. This clearly portrays the potential of investments in the tourism sector.

The contribution of travel and tourism industry in the world GDP stands at about 10.4% and in most nations with advanced travel & tourism, this industry contributes more than 13% to their respective GDPs. According to World Travel & Tourism Council, India is also on a high growth trajectory, projected to grow by an estimated CAGR of 7.1% in terms of GDP contribution over the next decade.

Concept of film tourism

Cinema has always been a popular vehicle for dissemination of culture, education, leisure and propaganda. However, given the impact of cinema on behavioral changes on audiences, it has in recent years emerged as an influential tool for the development and promotion of destinations.

Film tourism describes the effects that cinema can have on our travel decisions as they inspire people to experience the screened places first hand. Not only is cinematic tourism an excellent vehicle for destination marketing, it also presents new product development opportunities, such as location tours, film museums, exhibitions and the theming of existing tourist attractions with a film connection. Several destinations have gained in terms of tourist influx by being the venue/location of popular domestic and international cinema. In addition to the exposure provided through such films, there are many ancillary gains to the destination like income generation, investment, job creation etc. which contribute to the overall economic development of the respective destination.

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1. Re-imagining India’s M&E Sector March 2018 - FICCI & EY
3. Central Board of Film Certification- Annual report 2015-16
4. Travel and Tourism Economic Impact 2018 India - World Travel and Tourism Council
Film tourism and India

India, in addition to being one of the leading film producing countries with the filming community spread across various regions of the country, also offers a diversity of landscape and locations in the different States/Union Territories, making it an appealing destination for production of both international and domestic films. There is a potential for up to a million film tourists which could result in revenues of up to US$3b by 2022.

The table below is a compilation of prominent Indian and International films partly/completely shot in India.

<table>
<thead>
<tr>
<th>S.No.</th>
<th>Name of the film</th>
<th>Domestic/International production</th>
<th>Location</th>
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<tbody>
<tr>
<td>1</td>
<td>Eat Pray Love</td>
<td>International</td>
<td>Delhi and Pataudi</td>
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<td>2</td>
<td>Slumdog Millionaire</td>
<td>International</td>
<td>Mumbai</td>
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<td>3</td>
<td>Mission Impossible 4</td>
<td>International</td>
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<td>4</td>
<td>The Dark Night Rises</td>
<td>International</td>
<td>Jodhpur</td>
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<td>5</td>
<td>Life of Pi</td>
<td>International</td>
<td>Puducherry and Kerala</td>
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<td>6</td>
<td>Octopussy</td>
<td>International</td>
<td>Udaipur</td>
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<td>7</td>
<td>Jobs</td>
<td>International</td>
<td>Delhi and Vrindavan</td>
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<td>8</td>
<td>The Best Exotic Marigold Hotel</td>
<td>International</td>
<td>Jaipur and Udaipur</td>
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<td>9</td>
<td>The Bourne Supremacy</td>
<td>International</td>
<td>Goa</td>
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<tr>
<td>10</td>
<td>Zero Dark Thirty</td>
<td>International</td>
<td>Chandigarh</td>
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<tr>
<td>11</td>
<td>3 Idiots</td>
<td>Domestic</td>
<td>Ladakh</td>
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<td>12</td>
<td>Dil Chahta Hai</td>
<td>Domestic</td>
<td>Goa</td>
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<td>13</td>
<td>Jab We Met</td>
<td>Domestic</td>
<td>Punjab</td>
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<td>14</td>
<td>Rang De Basanti</td>
<td>Domestic</td>
<td>Delhi and Punjab</td>
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<tr>
<td>15</td>
<td>Munna Bhai MBBS</td>
<td>Domestic</td>
<td>Maharashtra</td>
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<td>16</td>
<td>Bajrangi Bhaijan</td>
<td>Domestic</td>
<td>Delhi</td>
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<td>17</td>
<td>Ramleela</td>
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<td>Gujarat</td>
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<td>18</td>
<td>Lagaan</td>
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<td>19</td>
<td>Krish 3</td>
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<td>Telangana</td>
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<td>20</td>
<td>Ra One</td>
<td>Domestic</td>
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The advent of the 21st century witnessed the globalization of the Indian cinema. Today, Indian cinema has not only reached out to global audiences but has also found global acceptance. Indian cinema is now widely recognized across the world and has been part of screenings at major international film festivals. The overseas market also contributes a sizeable chunk to film industry’s box office collections. Investments made by major global production houses also confirms that Indian cinema has made a mark for itself in the global film market.

It has been noted that especially over the last couple of decades, an increasing number of tourists began to visit destinations featured through films, TV or any other similar way of visuals which are not directly related to tourism promotion campaigns. Post liberalization of the Indian economy in 1990’s, people from various segments of the society started going abroad for short term and long-term leisure as well as non-leisure trips. At the same time, momentum to film abroad also picked up amongst the Indian film producers.

Besides portraying and boosting international destinations through films, Indian cinema has also played a major role in tapping previously unknown destinations within India. Film producers have increasingly stepped up their efforts to identify unique locations for filming their cinema, resultantly popularizing such destinations as “must visit” places in the minds of the Indian travelers.

“In the past we have seen the impact of Mr. Yash Chopra’s films on the tourism to Switzerland and more recently the impact of tourism to Spain from India due to the film Zindagi Na Milegi Dobara. The tourism bodies worldwide have now recognized the role of Indian films in boosting tourism so have started giving huge rebates and help during marketing of the films. Recently Abu Dhabi and Austrian tourism authorities played a huge role in facilitating and subsidizing the costs of the shooting of Tiger Zinda Hai in their respective countries thus substantially enhancing the profits of the film.”

Aashish Singh
CEO - Motion Pictures
Balaji Telefilms Ltd

“As filmmakers we try to shoot in interesting new places to provide audiences with new experiences, which often has a symbiotically positive impact on the tourism to the countries we shoot in. For example, our film Zindagi Na Milegi Dobara was shot almost entirely in Spain and introduced Indian audiences to Spanish culture and society. Following the release of the film, the Spanish Government awarded the team behind the film high level decorations and reported an increase of Indian tourists by 30% - several locations we shot at have become popular tourist hotspots. Such an effect can only become greater with increased filming initiatives by Government authorities and greater co-operation between filmmakers and tourism boards.”

Kassim Jagmagia
Associate Producer
Excel Entertainment Pvt Ltd
Impact of 3 Idiots on tourism in Ladakh

The climax scene of the movie was shot on the banks of Pangong Tso Lake in Ladakh, in the State of Jammu & Kashmir. Pangong Tso is a scenic mountain lake, at a height of 4,350 metres above sea level and can be reached after a five hour drive from Leh (capital and entry point to Ladakh) over rough and dramatic mountain roads.

As a consequence of the movie, the popularity of Pangong lake soared. Props such as the mustard-yellow scooter used by the lead actress in the movie and life-size cut-outs of the lead actors can be seen on the banks of the lake. Several restaurants and cafes in the area have been named after the movie and its characters.

Tourist arrivals in Ladakh grew to 2.4x the average number prior to the movie's release and continue to grow even after nine years since the theatrical release of the film.

Impact of Zindagi Na Milegi Dobara on tourism in Spain

The film features three friends on a pre-marriage road trip across Spain and includes scenes at the Tomatina festival in the town of Buñol and the San Fermín bull-running festival in Pamplona. With scenes also set in Barcelona, Seville and the beaches of the Costa Brava, the film was the first major Indian production to be shot extensively in Spain. It was also the highest grossing Bollywood film of 2011.

There was an immediate impact in the number of people requesting entry visas to travel to Spain. The year after its release 60,444 Indians visited Spain⁵, nearly double the 2011 figure, according to the industry and tourism ministry. In 2015 the number had risen to 85,000.

Spain and India signed a film co-production agreement in 2012, a year after Zindagi Na Milegi Dobara was released.

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⁵ https://www.theguardian.com/world/2016/jun/19/spain-courts-bollywood-productions-to-attract-more-indian-tourists
“Indian cinema’s spectacular influence in driving outbound tourist traffic to countries in Europe and USA is well documented. The national tourism boards of these countries recognize the power cinema exerts in lives of Indians and how its larger than life narrative influences their decisions while choosing their holiday destinations. This has enabled them to encourage Hindi and regional film industry captains to shoot in their countries by offering them rebates, subsidies. Local support and unexplored locales. Even though our country has some of the most stunning places in the world, we are yet to see most of them on the big screen. In recent past the Govt of India and the state governments have woken up to the importance of using cinema as a tool to drive inbound and outbound tourism but a lot still needs to be done in ensuring that we have faster, smoother -one window /one desk approval system and clear cut subsidies/rebate structures in place that can encourage and entice film makers in all the states. This will also help international film production companies to look at India as a go-to destination to shoot. If cinema becomes the centerpiece of India’s soft power diplomacy and we have policies that are shaped around it- there is no reason why what we cannot repeat in our country what Indian film industry has achieved for countries abroad i.e. make them hot spots of tourism!”

Vivek Krishnani
Managing Director
Sony Pictures Entertainment India

“A location becomes famous when it has been embraced with the local flavour/ culture. 3 Idiots was a perfect example. Its been 9 years since its release and since then, the tourism in Leh has quadrupled year on year. Restaurants have been named after the movie and Rancho (character of Aamir Khan). Pangong lake has a few photo ops locations where tourists take home a memorable pic with the props of 3-Idiots (bum chairs, scooter). The then Chief Minister had gone on record to state that we do not need to promote tourism in Leh region as 3 Idiots has done it”

Sanjiv Kishinchandani
Executive Producer
Rajkumar Hirani Films Pvt Ltd
Benefits of film tourism
Direct benefits

These are the benefits which can be directly attributed to the production of the film in the locality and are as follows:

- Revenue generation due to direct spends on equipment hire, accommodation, leisure and travel expenses incurred during the period of film production in the locality.
- Employment generation on account of hiring of local talent such as technicians, artists and people with local know-how.
- Providing an impetus to the local film industry by training the local talent and providing exposure to new technologies and techniques.
- Technology transfers which enable the local talent to hone their skills and individually explore future opportunities for film production.

Induced benefits

Other than direct spends during production shoots, creative industries induce tourism in three ways:

A. Creating awareness

Showcasing less-known locations in films or television programs. For instance, Dudhsagar Falls gained sudden popularity after the shooting of a sequence in the film Chennai Express. Hidimba Mandir in Manali was a laid-back location until it was turned into a must-visit destination through iconic scenes from the movie Ye Jawani Hai Diwani.

B. Presenting a location in an attractive manner

Creating a memory or aspirational value in a location or attraction that would not have been present otherwise. For example, Jaipur, has always been famous because of its mesmerizing architecture and historical monuments. However, not all forts and structures of Jaipur could catch the attention of Bollywood as well as Nahargarh Fort could due to the sequence of the film Rang De Basanti shot here.

C. Creating/shaping attractions

Actively creating attractions around themes from film / television content. Disney’s theme parks and hobbit-themed hotels in New Zealand after the shooting of The Lord of the Rings are examples of this mechanism.

“Cinema has become integral part of our lives. Our holidays, customs and traditions are being influenced by cinema. It won’t be wrong to say that we know or understand our surroundings and the world more because of cinema. World over, cinema is drawing tremendous attention from large number of film commissions and tourism offering incentives and production support to lure productions.”

Poonam Shroff
Creative Content Development & Production Head, ZEE Studios

The impact of cinema filmed in a foreign country is immense. The film gains by exquisite locales and a fresh look along with the cost incentives provided by the countries and the countries in turn see a serious boost in tourism along with an increase local employment and revenues. We have been seeing this association from the times of Yash Chopra and Switzerland, Kal Ho Na Ho and USA, Zindagi Na Milegi Dobara and Spain and off late Badrinath Ki Dilhania and Singapore. It is a mutually beneficial and symbiotic relationship and we look forward to more and more countries coming forward to associate with our film fraternity.

Sumit Chawla & Parth Dholakia
Dharma Productions
Suggestions for promoting film tourism
In order to achieve the ultimate objective of transforming film locations into tourist destinations it would be pertinent to lure film productions to such locations. Accordingly, the suggestions to transform location into vacation have been stated keeping in mind the below objectives:

**Simplify: the administrative process**

**Incentivize: film productions in the location**

**Promote: filming at the location**

“Cinema in most of the countries has been considered as a priority sector and referred to as a “soft power” especially for formulation of policy strategy of a country. This is primarily due to the economic reasons for the service sector and because of the influential role which cinema plays in the minds of individuals. The idea is to harness the influential power of cinema and attract individuals to such locations for travel and tourism benefits where the film shooting has been carried out. The Government of India also needs to take cognizance of the underlying benefits of film tourism and frame and reframe policies to lure film productions into the country and states to boost their tourism and economy.”

Kulmeet Makkar
CEO - Producers Guild of India
Simplifying the administrative process

Setting up a single window clearance facility for all filming permissions

Filming in majority of the Indian states involves seeking permissions and approvals from various government functionaries. Accordingly, to attract foreign and domestic filmmakers, it is pertinent that a single window clearance mechanism is implemented to provide all necessary approvals under a single roof. This will protect the producer from running pillar to post and in turn ensure a hassle-free filming experience. The mechanism for setting up a single window clearance has been given below:

Setting up of online portal by state government

A state-level online portal will provide information (such as permits required, production resources available, etc.) to filmmakers (local and international) intending to shoot or produce at a location in the state.

The responsibility of operating and maintaining such an interactive online portal, at the state level should be placed on the Ministry of Tourism. The state should earmark certain locations for film shooting. The list of such earmarked location along with pictures, should be provided on such online portal. Such a step shall assist in attracting a filmmaker, who is scouting for locations, to visualize and finalize the location.

Furthermore, for the ease of film shooting by foreign filmmakers, as well as domestic filmmakers, the Ministry of Tourism should also empanel certain line producers who would assist such filmmakers during the process of shooting of the film. The details of such empaneled line producer should also be available on the online portal.
Building brand India through film tourism

**Goa**

Single window clearance mechanism has been implemented in Goa. The Entertainment Society of Goa is also playing an important role in easing out procedures and permissions for film shootings in Goa through a single window system.

**Delhi**

To promote Delhi as a film-shooting destination in the National and International Market, Delhi Tourism, in collaboration with the Ministry of Information and Broadcasting, has taken various steps to facilitate the shooting of movies in the city. Delhi is in the process of introducing Single Window Clearance for film-making facility so that the legal formalities to shoot in the city can be performed by visiting only one government office and has published a detailed film shooting manual for the same.

**Gujarat**

The Gujarat Tourism Department, has started a separate single window clearance desk to assist filmmakers scout locations and extend logistics support. The tourism department shall get necessary permissions from all concerned departments on applicant’s behalf within a period of 15 days. Gujarat's Single Window Clearance facility boasts an online portal, database of production facilities and emergency services because of which Gujarat has been conferred with the National Award for “Most Film Friendly State” at the 63rd National Award Function.

**Jammu and Kashmir**

The government has setup a single window clearance system for granting permission for shooting films within seven days in Kashmir.

**West Bengal**

The West Bengal government is mulling on opening a single window to process requests to shoot movies in the state - a move which will spare the producers the hassle of knocking at the doors of multiple government departments. The move is in line with the government’s policy to enable the entertainment industry to have a strong footprint in the state and to promote film-tourism.

**Kerala**

Kerala State Film Development Corporation has got approval for single window clearance system from Government for shooting purposes.

**Himachal Pradesh**

Single window clearance system has been set up to assist the film makers for granting the shooting and building permissions, law and order related issues and movement of equipment at their level.

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8 http://www.ksfdc.in/html/swcm.php

9 Unleashing the power of film tourism: The First Step - EY Report

Countries which have implemented single window clearance across the world:

**Vancouver, Canada**

Vancouver Film Office is the body responsible for helping production companies access city services and obtain proper permits and authorizations to film on city streets or property. Vancouver has two film offices - one for granting permission for filming in or around parks, and one for all other locations. Productions that cover both parks and city property are required to take permission from both offices.

**Melbourne, Australia**

The City of Melbourne has a dedicated Strategic Planning and Logistics Filming Coordinators team, responsible for ensuring a trouble-free filming experience in Melbourne. It ensures the permits required are processed efficiently and city-users are provided with as much vital information as possible before the production begins. The coordinators act as a facilitator between local city stakeholders and the production companies ensuring that all concerns are well informed and any impact is minimal.

**Singapore**

The Management and Development Authority of Singapore (MDA), a statutory board under the Ministry of Communications and Information was formed in 2003 by merging the Singapore Broadcasting Authority, the Films and Publications Department and the Singapore Film Commission to promote and regulate the media sector. The MDA has setup a special Location and Media Services Desk to support local and foreign filmmakers filming in Singapore. The desk aims to create a production-friendly environment in Singapore by:

- Serving as a one-stop information Centre for local and foreign filmmakers providing recommendation of potential locations, production and post-production facilities and services, skilled technical and creative talents, financial aid schemes and other support functions and services.
- Acting as a liaison between the film and television industries and government agencies or location owners, and between industry professionals themselves, easing the location clearance and filmmaking process.
- Promoting Singapore as a filming location and post-production hub.
- Providing facilitation letters to help ease the location permit clearance process.

Additionally, the Location and Media Services desk will also provide information and assistance to Non-Singaporean film makers in submitting relevant documents to the Singapore Ministry of Manpower (MOM) and the Immigration & Checkpoints Authority (ICA). The desk also helps in hiring local production manager to smoothen the shooting process.

**New York, US**

The Mayor’s Office of Film, Theatre & Broadcasting (OFTB) is the one-stop shop for all production needs in New York City (NYC), including permits, free exterior locations and free police assistance. The agency markets NYC as a prime location, provides premiere customer service to production companies and facilitates production throughout the city.

Additionally, the OFTB also supports requests for any location sites which are not directly covered under their permit such as The Metropolitan Transit Authority (MTA), The Port Authority, government buildings, parks and landmarks under state or federal jurisdiction, as well as many, key privately owned locations such as Rockefeller Centre and most non-profit institutions which have relationships to city government such as the American Museum of Natural History and Lincoln Centre.

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Incentivizing filming in the country /state

The state governments should offer different types of incentives to boost the production sector in the form of single window clearance, tax benefits and simplification of permissions for shooting and increase in the number of cinema halls, overhauling the tax structure to name a few.

Based on a study of such incentive programs in place internationally and locally, following are broadly the types of incentives which could be offered to a filmmaker:

**Cash grants**
Cash grants are non-repayable funds disbursed to production companies, which help them to reduce their cost of production. Cash grants can be paid upfront or on completion of a project. Furthermore, generally, cash grants are subject to some level of compliance; however, grants are also provided without any conditions.

**Cash rebates**
Cash rebates are refunds of actual expenditure incurred. Typically, cash rebates are provided at a specified percentage of the qualifying expenditure. Qualifying expenditure includes costs incurred in the host country during the shoot on the cast and crew, goods and services purchased or at a specified percentage of overall production budgets. Interestingly, rebates offered are grants; however, not all grants are rebates.

**Tax credits**
Tax credit is a sum deducted from the total amount a taxpayer owes to the treasury. A tax credit can be granted for various types of taxes such as income tax, GST, etc. Furthermore, another form of tax credit is by way of a refund of taxes paid while filming in a location. Tax credits can either be refundable or non-refundable and further, transferable and non-transferable.

A refundable tax credit is one through which the tax liability of the taxpayer can be reduced to below zero. Because it is possible to receive a tax refund from this type of credit, it is referred to as refundable tax credit. However, in case of a non-refundable tax credit, the tax liability can be reduced only to zero and not below.

**Tax holiday/break**
A tax holiday is a temporary reduction or elimination of tax. In other words, there will not be any tax liability for a period on taxable income earned during the said period. Over the years, countries have been offering tax breaks and holidays to attract production companies to shoot films in them. It is relevant to note that such breaks and holidays bring down production costs significantly.

**Non-monetary assistance**
Apart from monetary assistance in the form of exemption from tax and cash rebates, many governments address other issues faced by production companies, e.g., clearances, approvals from various dignitaries, visa procedures, etc.

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Equity investments in film projects

To provide financial stimulus to film producers with budget constraint and to boost film production in a nodal body setup for the said purpose could purchase equity in the film. Equity investment in the film could be subject to the following conditions:

- 60% to 70% of the film is shot in the state
- Joint review of the script, storyline and star cast by the producer and nodal body
- Use of local talent for production of the film
- Setting up of a separate legal entity in the state and bifurcation of the equity between producer and state in the proportion of the investment made
- Audit of accounts and distribution of profits made by the film through its exploitation over various mediums

Equity investment would encourage local producers to produce films without the financial burden of raising funds by taking debts.

**Marketing and promotion tie ups with film/ television producers**

State governments spend millions of rupees in marketing their state from a tourism point of view. Majority of these expenses are towards television commercials which run for short duration at periodic intervals on the television. Given this, the retention probability and in turn their effectiveness is limited and the ultimate objective of promoting the state as a tourist destination may not be achieved.

Films on the other hand are a more effective medium of communicating the message which the state wants to convey. This is because a film tends to capture the focus of the audience and keeps the audience engaged for a longer duration. People find it easier to relate to films and co-relate places to films rather than television commercials. Also, the urge to imitate famous actors basis sequences/ shots featured in the films is a huge driving factor for a potential tourist in selecting his ideal vacation spot.

The state governments could enter into marketing tie ups and co-promotion agreements for films/ television series and digital series produced wholly or partially in the state. In order to participate in marketing of the film the state government could enter into a co-promotion agreement with the film producer for the marketing of the film.
Incentive programs provide direct and indirect economic and fiscal benefits that extend beyond production activities that qualify for the credit. These benefits include increased employment opportunities, growth in direct and indirect taxes, increased tourism, development of content production industry infrastructure such as studios and service providers, and the attraction of production activities not eligible for credit. Given below is the summary of incentives offered by various countries across the globe for film production.

### France

**What is the scheme?**
Tax Rebate for International Productions (TRIP) provides a 30% tax rebate to non-French projects that are wholly or partly made in France. The maximum rebate that can be granted to a single project has been capped at EUR30 million (~INR2,315 million).

**What is the type of incentive?** Cash rebate

**What are the eligible film formats?**
Film and TV productions are considered as eligible formats for claiming TRIP, subject to them being a work of live action or animation. Accordingly, documentaries and commercials are not eligible for TRIP. Further, the scheme specifically excludes productions that are pornographic in nature or promote violence.

### Hungary

**What is the scheme?**
Hungary Tax Rebate Scheme (HTRS) is a part of the film support program approved by the European Union with a total budget of EUR402 million (~INR31,026 million). The scheme provides a rebate of 25% of the eligible expenses incurred on a film. Further, the scheme has a sunset date of 31 December 2019.

**What is the type of incentive?** Cash rebate

**What are the eligible film formats?**
The following formats are considered as eligible for HTRS:
- Feature films
- TV series
- Documentaries
- Animated films
- Experimental films
- Short films

However, formats such as pornographic films, extremely violent films, commercials, reality shows and daily soap operas are ineligible for HTRS.
**Czech Republic**

**What is the scheme?**
Czech Republic Cash Rebate is a part of the Czech Incentives Scheme, which is administered by the State Cinematography Fund. It provides a 20% cash rebate on qualifying Czech spend and a rebate of 66% of withholding tax paid in the Czech Republic. Further, the cash rebate does not have any per project cap.

**What is the type of incentive?** Cash rebate

**What are the eligible film formats?**
Czech Republic Cash Rebate is applicable for a variety of formats:
- Feature films
- Animation films
- Documentary films
- Fictional TV content, including films and TV series
- Animated series

Accordingly, commercials and other advertising programs and films displaying violent and pornographic content will not be eligible for the cash rebate.

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**Georgia (Europe)**

**What is the scheme?**
Film in Georgia is a newly launched film industry incentive program offering a 20% cash rebate on qualified expenses incurred in Georgia. An additional rebate of up to 5% is available if a production promotes Georgia as a destination by meeting the program’s “Cultural Test.” In case of a qualifying production, a rebate of up to GEL1 million (~ INR26.35 million) will be automatically approved by the administrating authority. For rebate beyond this amount, prior approval of the Government of Georgia is required.

**What is the type of incentive?** Cash rebate

**What are the eligible film formats?**
- Feature films
- Internet/TV film
- TV series or miniseries (including pilot episodes)
- Documentary films
- Animated films
- Commercials
- Reality shows
- Music videos

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**Austria**

**What is the scheme?**
Film Industry Support Austria is a subsidy program governed by the Federal Ministry of Science, Research and Economy of Austria. It is designed to support national productions, Austrian co-productions as well as service productions (international productions) of cinema films with an annual budget of EUR7.5 million (~ INR578.84 million). It provides a non-repayable grant of up to 20% of eligible production costs in case of national and international co-productions. In case of service productions, the grant is provided at a rate of 25% of the eligible production costs. However, the total grant disbursed to a single applicant shall be restricted to 15% of the annual grant budget, i.e., EUR7.5 million (~ INR578.84 million). Further, maximum 20% of the annual grant budget shall be spent for funding service productions.

**What is the type of incentive?** Cash grant

**What are the eligible film formats?**
All feature films including fiction films and documentaries are eligible for FISA.

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**Serbia**

**What is the scheme?**
The Serbian Cash Rebate offers a benefit of up to 20% of the qualifying spend incurred in Serbia. For the year 2017, the total budget allocated for the rebate was EUR3.2 million (~ INR246.97 million) with no cap on per project grant.

**What is the type of incentive?** Cash rebate

**What are the eligible film formats?**
- Feature films
- TV film
- TV series
- Documentaries
- Animated films
- TV commercials
- Post-production activities for any of the above formats

Further, any content that is immoral, detrimental to public interest, detrimental to the image of Serbia or promotes violation of human rights shall not be considered as an eligible format.
Mauritius

What is the scheme?
Film Rebate Scheme (FRS) of Mauritius offers a cash rebate of 30% on the qualifying production expenditure incurred in Mauritius. If the production contributes or will contribute to significant economic benefits for Mauritius, then the rebate shall be provided at a rate not exceeding 40% but which shall not be less than 30%. Such enhanced rate shall be decided by the Film Rebate Committee (FRC) and shall be subject to the fulfilment of certain conditions as listed in subsequent sections.

What is the type of incentive? Cash rebate

What are the eligible film formats?
FRS is applicable for a wide range of film and TV productions, including the following:
- Feature films
- Documentaries
- Animation films
- Telemovie
- Single-episode drama TV programs, including animation programs
- Episodes of factual, natural history, lifestyle programs
- Commercial programs or advertising features

Further, the scheme also lists down formats which are considered as ineligible for FRS.

New York

What is the scheme?

New York State Film Tax Credit Program is a program initiated by the Empire State Development Authority of New York. It consists of two different credit programs, namely, Film Production Credit and Post-Production Credit. Film Production Credit provides a fully refundable credit of 30% to a qualified film production company on all qualifying production, pre-production and post-production costs incurred in New York. Further, projects with a budget of more than US$0.5 million (~ INR32.66 million) will receive an additional credit of 10% for incurring qualified labor expenses in specified counties of New York.

Post-Production Credit provides a fully refundable credit of 5% for project engaged in only post-production activities in specified counties of New York. Such post-production credit cannot be claimed simultaneously along with the film production credit of 30%. The program has a total budget of US$420 million (~ INR26,257.51 million) per year out of which US$25 million (~ INR1,632.93 million) has been allocated for Post-Production Credit.

What is the type of incentive? Tax credit

What are the eligible film formats?
The following formats are considered as eligible for NYSFTCP:
- Feature films
- Television series
- Relocated television series
- Television pilots
- Films intended for television

Further, the scheme also mentions a list of formats that are ineligible for NYSFCTP.
Promote filming destinations

Soft measures by government for promoting filming destinations

The following soft measures could be taken by the governments to promote the locations as attractive filming destinations:

- Setting up of film based theme parks like concepts of Universal Studios, Bollywood Theme Park (Dubai), Disneyland, etc.
- Organizing film festivals annually and using the platform to promote as a preferred filming destination.
- Organizing award shows, film seminars and film societies to nurture the film culture amongst various social groups in the state.
- Boosting the safety and security of the state by establishing help lines, and compulsory registration of tourist guides operators, etc. to ensure safety of the tourists as well as the film crew. These initiatives may be highlighted by the states/central government in various promotional campaigns to project India as a safe and secure tourist destination.
- Inadequate basic infrastructure such as roads, inland water transport, air connectivity, etc. acts as the biggest hindrance to the Indian film tourism industry. There is an urgent need for investment in infrastructure linking roads, railways and airports, to curtail such hindrances and provide basis infrastructure support to film tourism.

Initiatives by the Government of India

- The Ministry of Tourism has recognized films as a powerful tool for promotion of tourism destinations and locations and taken following steps to promote film tourism as an important niche tourism product:
  - The Ministry of Tourism has formulated guidelines, for extending Central Financial Assistance (CFA) to various state governments/union territory administrations, for promotion of film tourism. Under these guidelines, CFA of INR2 lakh per film is extended, during each financial year, to the state governments and union territory administrations for a maximum of five Films, which include feature films, documentaries, tele-films and television serials. The CFA is granted for meeting the costs towards space hiring/filming charges, facilitation fee, etc., payable by the filming unit to various state governments, union territory administrations, government agencies, etc. The films for CFA are selected based on the potential exposure they can provide for promotion of tourism destinations and locations. These guidelines have been circulated to all state governments/union territory administrations and have been uploaded on the official website of the Ministry of Tourism.
  - To establish India as a preferred filming destination and promote film tourism, the Ministry of Tourism and the Ministry of Information & Broadcasting entered into a Memorandum of Understanding, inter-alia, to promote cinema of India as a sub brand of “Incredible India” at various international film festivals and markets abroad, to develop synergy between tourism and the film industry and to provide a platform for enabling partnerships between the Indian and global film industry.
  - To promote film tourism, the Ministry of Tourism and the Ministry of Information and Broadcasting have jointly participated in the Cannes Film Festival & Market; International Film Festival of India Goa and Film Bazaar, Goa.
  - The Ministry of Tourism has also written letters to the chief ministers of various state governments and chief ministers/administrators of various UT administrations, to recognize the potential of film tourism and constitute special bodies/cells to facilitate filming in the states/union territories.
  - The Ministry of Tourism has instituted a National Tourism Award in 2012 “Most Film Promotion Friendly State/Union Territory” to encourage the State governments and union territories to facilitate filming in their state/union territory.
  - The Government of India has also approved execution/executed of Memorandum of Understanding with countries such as Romania and Bulgaria to foster bilateral cooperation through film tourism for promoting the two countries as attractive tourism destinations.

Initiatives by various state governments of India

Every state in India is diverse not only by its culture, but also by the rewards it offers to film producers. Several Indian states have various incentive schemes to attract filmmakers for film production. Acknowledging the enormous impact of cinema on choice of travel destinations worldwide, Indian states have been actively redesigning their respective tourism policies to promote more and more film tourism. There have
been quite a few initiatives to promote regional and Bollywood movies, also encouraging international film fraternity to look for exotic locations in various states of India.

**Maharashtra**

With Mumbai being the entertainment and fashion capital of India, it provides an ideal destination for Indian and world cinema. Along with the existing infrastructure in the Mumbai film city, sets in other parts of the state, the state aims to build further avenues in the form of film museums, theme parks, film city tours, etc. to build this segment. Maharashtra Tourism Development Corporation has announced a Bollywood tourism plan, under which Indian and foreign tourists can take guided tours of film studios and sets while being exposed to a first-hand experience of film shooting.

Major initiatives by the state government include:

- Promote Maharashtra as an ideal destination for film shootings and gain from tourist influx by being the venue / location of popular domestic and international cinema.
- Ease the intricate and complex clearance process, and incentivize film makers by providing them single window clearances and incentives to choose Maharashtra as their preferred destination choice for film shootings.
- An online registry mechanism of various services related to film industry to be established.
- Creation of the Film Tourism Promotion Council under the aegis of “Maharashtra Tourism”.
- Organize familiarization tours for major production houses in India and across the globe for key tourist destinations in Maharashtra.

**Gujarat**

The Tourism Department of Gujarat aims to develop film tourism by creating state-of-the-art infrastructure besides promoting exotic locations.

- As a pre-event of the high-profile investment congregation, Vibrant Gujarat Global Summit, the State Government had organized a day-long seminar on “Cinematic Tourism - the way forward”.
- The Gujarat Tourism Department is aiming to attract film makers, directors from the state and outside to showcase the advantage of the state's tourism policy and film making policy apart from the scenic natural beauty for film making. The state also offers subsidy and financial assistance for superior quality Gujarati movies.
- Film shooting at tourist destinations in Gujarat to be further encouraged through single-window clearances.
- To promote Delhi as a film-shooting destination in the National and International Market, Delhi Tourism, in collaboration with the Ministry of Information and Broadcasting, has taken various steps to facilitate the shooting of movies in the city. Delhi is in the process of introducing Single Window Clearance for film-making facility so that the legal formalities to shoot in the city can be performed by visiting only one government office.
- Several steps are being taken to introduce a smooth system for granting permission to film producer, to provide them consolidated information on instructions/ guidelines issued by various departments of the government and to make film shooting a hassle-free experience.

**Goa**

- To develop Goa as a favorable film tourism destination, the government is looking forward to developing infrastructure facilities such as a film city. It has plans for providing equipment such as cranes, spotlights, reflectors, camera, etc. along with many other production facilities needed for film shootings.
- The Entertainment Society of Goa is also playing an important role in easing out procedures and permissions for film shootings in Goa through a single window system.
- The International Film Festival of India is held annually at Goa which attracts filmmakers from across the globe.

**Jammu and Kashmir**

The government has setup a single window clearance system for granting permission for shooting films within seven days in Kashmir.

Film Tourism Promotion Committee established to promote the region as a filming location and extends all support to film productions including security.
**Karnataka**

Karnataka all set to promote scenic locations as film tourism destinations.

- The Department of Tourism has identified 319 potential destinations for film tourism.
- The policy promises a single-window clearance facility, dedicated web portal, footage of locations for international promos, and database of product facilities, hotels, and emergency services.

**West Bengal**

West Bengal plans to make it easier for films to be shot in the state. West Bengal Tourism Policy focuses on specific components of cultural tourism includes fairs and festivals tourism, heritage tourism, arts and crafts tourism, cuisine tourism, film tourism, family, relatives and friends’ tourism, and village tourism.

- The West Bengal government is mulling on opening a single window to process requests to shoot movies in the state - a move which will spare the producers the hassle of knocking at the doors of multiple government departments. The move is in line with the government’s policy to enable the entertainment industry to have a strong footprint in the state and to promote film-tourism.
- The tourism department will see to it that the infrastructure in the shooting sites is upgraded so that film units are provided with adequate accommodation, restaurant facilities, roads, healthcare, shopping plaza and transport.
- Initiatives have been made to set up film cities in the state.
- Maximum incentive of INR 30 million in the form of subsidy for film makers executing post production processing at Cine Laboratory Complex.

**Odisha**

According to Odisha Tourism policy 2016, specified film tourism policies have been laid down to promote film tourism in the state.

- To encourage shooting of feature films in important tourist locations and thereby highlighting different tourist destinations in the state, incentives equivalent to 75% of the actual expenditure incurred on accommodations in hotels of Odisha during such shootings shall be reimbursed to a ceiling of INR 10 Lakhs.
- Special Single Window Clearance Committee has been formed and will be the competent authority to sanction incentive for film shooting.
- The much-awaited film city in Odisha where tourists would have Disney World-like experience would come up soon in Asia’s largest brackish water lagoon, Chilika. The project born out of the “Make in Odisha” campaign launched by the state government for investment in the film production sector would be a reality when the film city is set up at an investment of INR 50 billion on the Chilika shore. The film city would be built up in a total area of 1,000 acres, out of which 370 acres has been allotted so far for beginning the project.

**Kerala**

The Kerala government has launched an initiative under its “Visit Kerala campaign” to join hands with the movie industry for film tourism, a growing phenomenon worldwide, that could promote the state’s picturesque tourist destinations through movies.

- Kerala State Film Development Corporation has got approval for single window clearance system from government for shooting purposes.
- Project Indywood, is set to turn Kerala into a Film Tourism hub. The main objective of the Indywood consortium is to elevate Indian Film Industry to global platform in the next five years. The INR 700 billion project aims at initiating 10,000 new 4K projection multiplex screens, 1,00,000 2K projection home cinemas, 8K/4K film studios, animation/ VFX studios and film schools on par with international standards.
- Kerala hosts a popular International Film Festival that is being attracted by thousands of film lovers and hundreds of filmmakers, from inside and outside the country.

**Himachal Pradesh**

To promote Himachal Pradesh as a favorite and major destination for promoting film making a Film Tourism Policy is on the anvil which would not only give fillip to tourism industry but would also facilitate film activities in the state.

- Single window clearance system has been set up to assist the film makers for granting the shooting and building permissions, law and order related issues and movement of equipment at their level
- The state had been organizing film festivals and other film related activities at Shimla from time to time.
- The state government was pursuing the matter with government of India for getting the air strips at Shimla, Kullu and Dharamshala extended and upgraded besides operationalizing regular flights which would provide added facility for film production and would boost tourism in the state.
Way forward
Introduction of film commissions

To see through the process of simplifying, incentivizing and promoting film production in the country and state, it would be pertinent that an independent body be setup both at a central as well as state level. Internationally such bodies are referred to as “film commissions” and are the focal point for film producers wanting to shoot in the country/ state.

Film commissions are quasi-governmental, non-profit, public organizations that attract motion media production crews (including movies, television, and commercials) to shoot on location in their respective localities, and offer support so that productions can accomplish their work smoothly. Film commissions in India could be setup at a state level. While the central level film commission could be incorporated in the Film Facilitation Office of the Ministry of Information and Broadcasting, the state level film commission could be incorporated within existing state level film development corporations itself with participation from key departments under the state government as board of directors. Additionally, the board of directors should include key members from the Indian film industry, who have reasonable experience about the film industry in the state.

Functions of the film commissions

- To promote, market and develop state as a location for film and television production.
- To serve as a body that represents people and associations participating in production of film and television production.
- To encourage coordination and leadership while serving as a liaising body between businesses, services, agencies and film production agencies.
- To facilitate training and community development in the film and television production.
- To formulate incentive policies and providing easy access to film incentives information;
- To act as a forum to lobby for interests of the film and television industry.
- To administer single window clearance guidelines, provide listing of locations, labor, jobs, equipment, lodging, boarding, etc.
- To facilitate safety and security assistance and troubleshooting production problems.
- For effective communication, the film commissions need to be powered by a digital platform. This platform will serve as a central repository for providing information to production (local and international) intending to shoot or produce in the state.
## Features of film commissions

<table>
<thead>
<tr>
<th>Key feature</th>
<th>Information provided</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Interactive map, weather, terrain, best ways to get there, photographs and videos, films shot in the past, religion and culture, local population, languages spoken, medical facilities</td>
</tr>
<tr>
<td>Permits and guidelines</td>
<td>Listing of permits, visa information, how and where to apply, estimated approval time, nodal officers, guidelines for shooting, conditions and restrictions imposed, laws, police and enforcement, nearby courts</td>
</tr>
<tr>
<td>Incentives</td>
<td>Types of incentives, quantum of benefit, how and where to apply, criteria to qualify, conditions and restrictions, incentive process with estimated time of receipt, details of authorities granting incentives, contact details of authorities</td>
</tr>
<tr>
<td>Production resources</td>
<td>Types of film equipment available, time taken to supply, supplier name and address, cost of transportation, travel and accommodation, post production facilities, safety and security</td>
</tr>
<tr>
<td>Labor</td>
<td>Local line production companies, listing of skilled and unskilled labor, job posting, recruitment agencies</td>
</tr>
<tr>
<td>Workshops and training</td>
<td>Details of various courses conducted, affiliations, universities and deemed universities, campus placements, training and workshops, vocational courses, career counselling</td>
</tr>
<tr>
<td>Grievance cell</td>
<td>Real time dispute resolution mechanism, local authorities, contact details, application process, public listing of grievances and its resolution, arbitration and settlements, public discussion forums</td>
</tr>
<tr>
<td>Film festivals</td>
<td>Hosting film festivals, recognition and rewards, participation in international film festivals, promote tourism</td>
</tr>
<tr>
<td>Contact us</td>
<td>Who’s who and their contact information, enquiries and feedback</td>
</tr>
</tbody>
</table>
Examples of film commissions across the world

California

The California Film Commission (the Commission) is a one-stop resource for film and TV production. Some of the services the Commission facilitates include film and TV tax credits and online permits for filming on government property (beaches, parks, roadways, universities and government buildings). Additionally, the Commission offers an online location database via “CinemaScout” as well as personalized assistance on location-related issues. Moreover, it facilitates access to California’s state-wide network of more than 60 regional film offices (for local support, location-related information and permits). Recently, California increased its film and TV tax credit incentive program from US$100 million to US$330 million per year for five years, a move aimed at reversing the export of the state’s movie industry to other states. The changes to the incentive program lower the threshold at which a production can qualify for the incentives. Moreover, California’s incentive programs have also been unavailable to projects with budgets over US$75 million, but the new program is expected to remove that qualifier.

New York

OFTB, New York, the first film commission in USA, serves all production needs in NYC. Whether production companies are shooting a feature film, a commercial, a television show or a music video, the OFTB serves as a resource to the NYC entertainment production industry. New York state offers several programs to the film and television industry in the form of tax credits and sales tax incentives. It offers US$420 million per year in credits for 30% of production costs. NYC’s production industry generates over $7 billion annually and employs over 130,000 people.

Louisiana

Louisiana Entertainment, an office within the state of Louisiana’s Economic Development serves as a one stop shop for producing films in Louisiana. Over the years, the state has been recognized as a global destination for motion picture and television production and the industry has grown exponentially thanks to its innovative and unique tax incentive packages. Louisiana offers tax credits of up to 40% of the money spent to buy, build and use movie production facilities. Further, films such as “Fantastic Four,” “Terminator 5,” “Pitch Perfect 2”, “Jurassic World,” the fourth film in the “Jurassic Park” series and other big-budget films are set to be shot in Louisiana because of the state’s investment in a tax credit program that draws producers.

Georgia

The Georgia Department of Economic Development is the State’s sales and marketing arm and the lead agency for attracting new business investments and tourists in addition to promoting the state as a destination for film music and digital entertainment projects. It provides 10 different types of credits and two types of tax exemptions including financial assistance and small business incentives. Georgia has become one of the top states for film production outside of California due to some of the incentives it provides. The industry directly employs 23,500 people, including nearly 8,200 production-related employees. According to the state, the film industry has made a US$5.1 billion economic impact during the 2014 fiscal year. Georgia-filmed movies that are scheduled to open in theatres in the coming months include “The Good Lie”, “The Hunger Games: Mocking Jay-Part I” and “Dumb and Dumber”.
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