

**THE SCREEN PRODUCTION INDUSTRY
IN THE AUCKLAND REGION:
TOWARDS UNDERSTANDING HUMAN CAPACITY ISSUES**

**A Report
Prepared for the
Auckland Regional Economic Development Strategy**

by

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1. INTRODUCTION AND OVERVIEW OF THE STUDY

This study was commissioned by AREDS (Auckland Regional Economic Development Strategy) in order to provide improved understanding of labour market issues of the screen production industry in the Auckland region. The match between job opportunities and the supply of skills will be crucial to achieving sustained growth of the screen production industry in the region. An important focus of the study therefore was to examine the nature and implications of labour market imbalances (skills shortages and surpluses) in the industry.

This report is structured as follows:

Commencing with an introductory section which sets out the current favourable national and regional context for the industry, the nature of the industry is briefly highlighted and the research approach of the study is delineated. Rather than focusing solely on identifying skills shortages in the industry sectors surveyed, a wide range of issues pertaining to each of the industry stakeholder sectors were canvassed. The report therefore outlines separately, the sector specific findings after first drawing together these findings with a summary of the general findings and main issues for the industry. From interviewee information we also drew-out detailed findings on a couple of specific jobs in the industry which are provided as job analyses but assigned, however, to the Appendix.

Following on from the sector specific findings, the report includes a discussion of the framework for understanding human capacity issues and a stylised model of labour flows for the screen production industry is offered that fits and links in with the findings put forward earlier. A general discussion on the nature of firm-specific and transferable skills – as a prelude to understanding why on-the-job up-skilling by employers is difficult to put into practice, also ensues. The penultimate section of the report makes brief comment on the value and feasibility of employment forecasting for the industry. To conclude, the report discusses the challenges for the industry. It also includes the rationale for action to build industry capability in the region and broad recommendations for the sustainable growth of the screen production industry.

At the outset of this report we signal caveats: Given the range of industry segments and the diversity of labour market stakeholder interests, the study captures perspectives as presented by a limited sample of participants. Generalisation of findings is therefore cautioned. Similarly, since value judgements of the participants are also likely to enter the picture, any criticisms must be viewed in this light.

2. BACKDROP: SETTING THE SCENE

2.1 Recent Supportive National Environment

Buoyed by the large scale and highly visible commercial success story of *The Lord of the Rings*, New Zealand's screen production industry has recently received national attention and both direct and indirect Governmental support.

At the strategic national policy level, the Government's Growth and Innovation Framework, 'Growing an Innovative New Zealand', or what has come to be commonly known as GIF, was released in February 2002. GIF has recognised the creative sector as a leading potential contributor to the future economic growth and international competitiveness of New Zealand. The screen production industry is acknowledged as a key segment of the creative sector.

A Screen Production Industry Taskforce was appointed by the Government in May 2002. The Taskforce, comprising a group of leading industry practitioners, was charged with addressing the chief issues that impede growth of the industry, and formulating a strategy for industry growth. In March 2003, the Taskforce set out its recommendations and framework for sustainable growth of the industry (SPI Taskforce 2003).

It also augurs well that the 2003 Government Budget allocated support for industry taskforce work. Funding of \$110 million, over four years, was set aside to respond to the recommendations from the four sector taskforces established for Biotechnology, Design, Screen Production and Information and Communication Technologies.

In June 2003, a 12.5 per cent production expenditure grant for both local and overseas large budget film and television productions was announced. While details of the grant criteria are yet to be finalised, it is expected that \$40 million could be available under the scheme, in the next financial year. Productions with production expenditure in New Zealand exceeding \$50 million will automatically qualify for the grant and if the production expenditure in New Zealand is between \$15 million and \$50 million, and this equates to at least 70 per cent of the total production expenditure, then these productions will also qualify (Ministerial Announcement 2003).

Other favourable factors with respect to the screen production industry include: government commitment to funding local content on television and the Maori Television Service; and agreement reached by the Television Local Content Group in mid 2003, establishing minimum levels of New Zealand programming on the major free-to-air networks - voluntary transmission targets for 2003 vary, with TV One agreeing to 53%, TV2 to 17% and TV3 to 20% local content.

2.2 Changing Tertiary Education Landscape

The Government's vision for a New Zealand knowledge society in terms of the tertiary education sector has been articulated in the Tertiary Education Strategy for 2002-07 (TES), and the Tertiary Education Commission (TEC) is designated as the key body charged with implementing this strategy and allocating funding according to national economic and social priorities (Ministry of Education 2002). The Statement of Tertiary Education Priorities (STEP) released periodically sets the priorities within the tertiary education system for the period, in line with the TES.

Under the tertiary education system reforms, publicly funded tertiary education providers (TEOs) are obliged to identify and meet the needs of their stakeholders and the needs of the nation as a whole. To incorporate these requirements TEOs must work towards Charters - which set out the mission, role and strategic direction of the TEO with respect to the TES, to be approved by 1 January 2004; and Profiles – which will reflect how the Charter will be put into action and include performance indicators.

Different categories of TEOs have defined roles to play within an integrated tertiary education system and improved collaboration between and among tertiary education providers are also required. Polytechnics and institutes of technology, for example, 'have a unique responsibility within the system as agents of regional development... deliver(ing) tertiary-level skills and knowledge at New Zealand's 'heartland', with direct links into local and regional industry' (Maharey 2003). Of vital importance is also the collaborative relationship between Polytechnics and institutes of technology sector and 'its natural partners in "skilling the nation", the industry training sector' (Maharey 2003). Dedicated funding pools and incentives such as the Polytechnic Regional Development Fund which is designed to strengthen partnerships between polytechnics (and institutes of technology), local industry, regional economic development organisations and iwi, have also accompanied the reform of the tertiary education sector. Thus under the new overall funding requirements of TEC, providers not only need to engage with industry, for instance in association with the process of their Charter and Profile development, but also can tap into special funds to deliver tailored and partnership solutions to meet the skills requirements of industry. The current and changing tertiary education landscape can thus be seen to be highly favourable to industry-relevant skills development.

The most recent Statement of Tertiary Education Priorities (STEP) released early in August 2003 that sets the priorities within the tertiary education system up to December 2004, in line with the (TES), has a strong emphasis on skills training to reflect the continuing demand for skilled workers and the emergence of skill shortages in some regions – chiefly under Strategy Four (Ministry of Education 2003). The STEP is a firm indicator that the Government is taking regional skill needs and the appropriateness of skills development in line with regional and numerical skills mismatches as a critical factor to be addressed by the tertiary education system. It also illustrates, once again, that in general the education and training environment is one that is conducive to addressing any industry-specific skills needs and shortages.

2.3 Screen Production Industry Taskforce Recommendations: Skills and Talent

Building human capacity is a prerequisite of any holistic approach for advancing the screen production industry. Nurturing and developing of both the current and future skills and talent of the industry, was therefore an important issue dealt with by the Screen Production Industry (SPI) Taskforce.

In order to maximise the potential benefits to the industry of the requirements arising from tertiary education sector reforms and the Tertiary Education Strategy, a main recommendation of the Taskforce was the formation of a 'Screenmark Federation'. The Screenmark Federation would oversee industry training and be designated by Government agencies as the official screen production industry training and educational representative body and be represented in the process of Profile approval by TEC in relation to the industry. The Taskforce was of the opinion that attempts to revive the industry's failed industry training organisation (ITO) – the Film and Electronic Media (FaEM) ITO, were not advisable, at the present time and it doubted the applicability of the formal ITO structure for the industry (SPI Taskforce 2003: 59). The Screenmark Federation would have a wider mandate than an industry ITO.

The role and purpose of the Screenmark Federation would be to:

1. Provide a high-quality and representative bridge between industry and the tertiary education system.
2. Provide an industry forum for developing needs analysis, policy advice and other appropriate submissions to Government.
3. Identify a pool of appropriate advisors from industry to sit on course advisory boards and consultative, accreditation and assessment and moderation panels.
4. Assure the consistency and quality of advice from the industry to the tertiary education sector.
5. Encourage, plan, coordinate and seek funding for training initiatives outside the formal tertiary education system. (SPI Taskforce 2003: 60).

The Screenmark Federation will offer TEC and providers:

1. One representative point for consultation with industry.
2. A pool of industry expert advisors.
3. A code of conduct for industry expert advisors.
4. A needs analysis for industry training.
5. The development (in conjunction with TEC and providers) of a pilot code of best practice for advisory boards in general. (SPI Taskforce 2003: 65).

The Screenmark Federation proposal and associated recommendations of the Taskforce will be brought into the discussion later in this report.

2.4 Regional Context

Internationally, there is a growing consensus that regional advantage in a knowledge economy hinges on high quality human capital – the ‘creative class’.

Nationwide, there is now large-scale re-sorting of people among cities and regions. Some regions become centers of the creative class; others have larger shares of working-class or service-class people.

As creativity¹ becomes more valued the creative class grows.

Florida 2002

For Auckland City, the Starkwhite (2002) report has stressed the importance of creativity and innovation and positioning Auckland as a ‘creative city’. It has recommended the creative sector be assisted ‘to see itself as a strategic cluster’ (Starkwhite 2002: 10). The Starkwhite argument for Auckland, can be fruitfully extended to the region. It is both appropriate and feasible to conceive of the Auckland Region as the ‘creative region’ and take steps at a regional level toward achieving this. A practical step in this respect would be to focus on specific components of the creative sector. As a dynamic, fast growing component of the sector², it is fitting that the screen production industry be such a focus. The screen production industry could then be envisaged as a major driver of the creative region and enabler for economic growth of the Auckland region.

The *Auckland Regional Economic Development Strategy 2002-2022* identifies a strategy framework to ‘connect the region with the world’ and secure sustainable economic development for the region. ‘Producing a skilled and responsive labour force’ is a vital element of this framework (AREDS 2002: 11). Support of target industries, is also recognised as a key initiative to ensure a skilled workforce (AREDS 2002: 45). Targeting the screen production industry as one of the lead sectors in an action programme for business growth and skills development in the Auckland Region, as well as an integral part of any creative region focus, has sound justification.

The annual Screen Production Survey for the period ending March 2002 shows that Auckland leads in terms of regional screen production expenditure, (Colmar Brunton 2002: 6). Over the last six years a ‘film friendly approach’ has been a feature of the region with a recent ‘big push’ especially from Waitakere City Council, Enterprise Waitakere and the Auckland City Council to initiate Film Auckland³. It is intended that Film Auckland will play a key role in facilitating the building of screen production capability of the region. Film Auckland is an initiative that is supported by all of the region's city and district councils. Further firm steps to build on this

¹ Creativity has three forms: technological creativity - innovation, new technologies, ideas and products; economic creativity which includes entrepreneurship and transforming of innovations and new ideas and products into new businesses and industries; cultural and artistic creativity – ability to new ways of conceptualising and thinking, new art forms and photography, new designs. (Florida 2002).

² In the period 1997-2001, the creative industries grew in nominal terms at an average of 8.7% per annum compared to 3.7% for the rest of the New Zealand economy (NZIER 2002). Within the creative industry sector, film and television were the fastest growing industries.

³ See e.g. http://www.areds.co.nz/downloads/film_auckland.pdf

foundation came with the Auckland Regional Film Summit held on 17 July 2003, and sponsored by AREDS. The Summit brought together 65 representatives from the screen production industry - practitioners and companies, industry organisations, guilds and associations, Local government, AREDS, central government agencies and tertiary education institutions. The Summit adopted a clear vision (a preferred future state):

A vibrant, growing, profitable screen production industry
...and an objective with stretch...
The doubling of activity in five years.

The Summit identified the early forward agenda that would start moving the cluster⁴ towards the preferred future. Priorities were voted on, and initial teams of volunteers were identified with people committed to taking the actions forward.

The six action agendas are in the areas of:

- Culture
- Skills
- Infrastructure
- Investment
- Marketing
- Intellectual Property

Funding has been committed to drive the Action Teams forward post-Summit. The facilitator for the teams has now also been contracted. Further strategic building of the screen production industry's capability is potentially a key dimension for a sound platform for sustainable economic development of the region

⁴ An Auckland regional screen production cluster holds out more promise than the previous more geographically concentrated and city or district focused cluster strategies that were linked to the industry in the region. For example in the late 1990s steps to advance the Waitakere City film industry cluster were being proposed – see e.g. Saïpe 1998. Clusters as a means of advancing regional development is now not only fashionable but a proven 'way to win the game' Enright 1992; see also e.g. Enright 1996; Doesborg 2003.

3. SCOPE AND RESEARCH APPROACH

This study was designed as essentially a broad qualitative assessment of the human capital issues facing the screen production industry, with particular reference to the Auckland region. In addition to an examination of relevant literature, the study comprised the conduct of twenty six in depth interviews, with a flexibly structured interview process to enable the sharing of knowledge and experiences being used.

As the springboard for scoping our study and toward understanding and evaluating labour market imbalances for the industry the occupational categorisation and descriptions adopted were on the basis of the Skills for Media⁵ classification. Skills for Media is the UK's specialist careers advisory service managed by professionals in the industry, and as such was assumed to be reasonably representative of the New Zealand situation. The five occupational classifications are:

1. Creative Roles
2. Technical Roles
3. Writing and Production Roles
4. Office Roles
5. Health and Safety

It was decided our study would focus on the first 4 occupational classifications above.

'Creative Roles', under the above classification, for example, includes occupations in the areas of Animation, Art and Design, Costume, Make-up and Hair, Set Crafts, Special Effects and Animal Department. Since animation cuts across industry sectors (Production: Film and Broadcast Television; Post-Production and Television Commercials) and as the animation sector is an area of growth particularly the Auckland region, it was decided to examine animation as a separate sector. Additionally, Maori human capabilities were an area of specific, dedicated examination including also specialist training requirements for Maori and generalised training and expertise of Maori for the industry. Our study was thus broken-down to six industry segments:

1. Film Production
2. Broadcast Television Production - TV
3. Television commercials production (TVCs)
4. Maori screen production
5. Animation
6. Post-production

Recognising that personnel may undertake a wide range of tasks depending on their individual job role and this also will vary between firms and/or projects, we wished to

⁵ Skills for Media 'A-Z of Job Descriptions'. Available:

http://www.skillsformedia.com/getting_in/resources/the_business/a_z.htm

Skillsformedia is owned and managed by the audio-visual industries through Skillset, the Sector Skills Council and BECTU, the industry trades union.

establish as well as get a ‘feel for’ what industry practitioners regarded as the generic/core skills and other requirements of various jobs; the nature of industry/firm specific skills, non industry/firm specific skills and transferable⁶ skills; and the shortage/surplus of these various skills. Integrally linked to our skills exploration was investigation into the impact and implications of current and future education and training regimes on the pool of skills for the industry. Thus for example, we sought to answer questions such as: What are the training requirements, entrance skills and qualifications for different jobs? What are the requirements of the higher level roles as against the lower level roles and what sort of training and education can ensure labour market demand and supply matching?

In order to assist with identifying labour market imbalances a ‘tick sheet’ was devised on the basis of the *Skills for Media* job categories and descriptions for each of the industry sectors (for Maori television the tick sheet was similar to the one for television). Each interviewee who was located either within film, television, Maori television, animation or television commercials sectors, was presented with the appropriate tick-sheet to complete. See **Appendix 1** for Sectoral Tick Sheets.

The tick-sheets sought to establish the skill and experience levels – low, mid and high, of job categories and investigate any labour market imbalances in terms of a surplus/shortage/neither shortage nor surplus (equilibrium). These areas were examined in relation to the interviewees’ experience with hiring staff over the last 2 years for vacancies or newly created positions within their company. Originally the tick-sheet was undertaken before the interview commenced, but it was found that sometimes it was easier for people to think of which positions they had hired for and what their requirements were, after the interview. On each tick-sheet the interviewee was asked to identify only those positions that were relevant to their particular company. Interviewees were also asked to add any positions that they felt were omitted from the tick sheet that had been compiled for each industry sector.

The following questions were posed to the interviewee:

- Hiring in the last 2 years, thinking particularly of those positions that you had vacancies for or were newly created, what were your requirements in terms of skill and experience level?
- When filling these positions, did you experience a shortage/surplus of staff at the appropriate level of skill and experience that you required? If there was neither a shortage nor a surplus, leave the space blank.

Most participants felt obligated to qualify their responses on the tick sheet by highlighting the issues that impacted on their requirements. These issues were discussed within the interview.

⁶ The notion of ‘transferable’ skills is a recent extension to the classic human capital theory distinction into specific and general skills. Transferable skills are intermediate between completely *firm* specific and completely general skills (Stevens 1996, 1994). Transferable skills can be ‘poached’ by other firms in the industry. The implication for training is that there is a disincentive for a firm to spend on training and up-skilling as other firms may then poach these skilled workers instead of training them.

The tick-sheet brought varied responses. For example, a respondent might say that their requirements were for a mid-highly skilled animator, but there was no shortage. Others might have said that their requirements were for a low skilled animator, and there was a shortage. While these responses may seem contradictory, the material from the interviews would resolve the apparent contradictions. Thus for instance, the interview would provide support for the assertion that due to the perceived inadequate training from providers, the multitude of animation graduates that had applied for the position was not suitable. Therefore that meant there was indeed a shortage of people with the basic skills that this company perceived they needed for this very entry level position. We note therefore that as this is qualitative research, generalizations cannot be made about the data from the tick-sheets. More importantly, the data that they provide is contextual in relation to the material provided in the interview. For example, as one interviewee commented: ‘... yes we did experience shortages at some stage but that was only because there was a feature film going on. As soon as that finished, you could say there was an over-supply’.

In the interviews we attempted to probe the ‘real’ reasons behind perceived shortages and how these could be responded to. Also in view of the fact that the literature had already identified people in some occupational categories as being in short supply, our research sought to further explore identified shortages and indirectly conduct job analysis for selected job categories. Production Accountants⁷ were already identified (Pinflicks Communications and NZIER 2003: v) as being in short supply and hence was one of the jobs we examined in terms of qualifications and experience and training solutions to mitigate the shortage.

The function of information flows in mediating labour market supply and demand is another important dimension to understanding the workings of the labour market for the screen production industry. The *Human Capability Framework* (Department of Labour, 1999) may be used as the approach for conceptualising the elements of capacity and labour market opportunities and the process involved in matching these two elements. Information flows and effective communication lines or channels, are vital to the ability of institutions to respond to, and mediate, capacity building decisions taken by individuals as well as current and future labour market opportunities defined by industry employers as skill needs. The focus on information flows within the integrated approach of the Human Capability Framework provides an innovative perspective for examining skill gaps especially in regional labour markets. It also helps explain human resource constraints faced by small and medium enterprise (SME) employers especially in countries like New Zealand, where they are crucial to the provision of opportunities in localised areas and are usually embedded in their regional economies in relation to work force requirements. See **Appendix 5** for the figure showing the elements of *Human Capability Framework*.

We decided therefore to make information flows that impact on the screen production industry, and as conceptualised in the *Human Capability Framework*, a focus of our research. In particular, the information flows that we investigated were:

⁷ Responsible for the effective management of project/programme expenditure through financial management and cost control. May be responsible for: maintaining records of income and expenditure; preparing GST returns, payroll records; drafting budget proposals; setting up and maintaining a petty cash system; and overall maintenance of an effective cash flow for screen production projects.

- Career information: This is vital for influencing individual choices in relation to their training paths. The availability of detailed information on careers and employment opportunities in a particular industry is a significant influence on the choice particularly of new entrants into the industry. A strand of our research therefore involved, through Career Services and schools' careers advisor – an investigation of information on training for employment in the SPI. We hoped to gain an insight into the state of careers information on the screen production industry in the Auckland Region and the extent of any perceived 'sexiness'⁸ of the industry.
- Information Channels of Training Providers: Aspects that we sought to gain insights on were: What current communication channels do training providers have to be responsive to the needs of industry? Are they effective and how can they be improved?

In summary, the research approach used in this study was mainly qualitative. In-depth interviews were conducted with representatives of the key industry stakeholders groups in Auckland, as well as people linked to careers advice, in order to obtain fine-grained information on human capacity related issues of the screen production industry. Prior to the interviews, participants received an information sheet outlining the aims of the study and detailing their right to refuse to answer questions or withdraw from the study at any time prior to the beginning of the analysis. Confidentiality was assured, and every effort has been made to protect the identity of participants. Unless otherwise requested, the interviews were tape recorded and then transcribed and coded according to themes that emerged during interviews. The interviewees were:

- Industry stakeholders in 6 segments of the industry: TV, film, commercials, Maori screen production, animation and the post-production sector.
- Tertiary Providers
- Careers Advice Stakeholders
- A Government Training-Education Policy/Programmes stakeholder

Following presentation of the preliminary findings of the study at the Auckland Regional Film Summit held on 17 July 2003, feedback was received from several participants at the Summit. This feedback has been incorporated into this report. Work on the action agenda by some members of the Skills Action Group formed at the Summit has also commenced. See **Appendix 3** for one of the preliminary meeting outcomes – a proposal for an Auckland on-the-job training pilot.

⁸ Recent findings say that some industries find it difficult to get young talent because the industry is traditionally regarded as 'unsexy' (e.g. agriculture, forestry and fishing, manufacturing). By contrast the software industry finds it much easier to attract talented young people (Knuckey et al. 2002: 183).

4. NATURE OF THE SCREEN PRODUCTION INDUSTRY⁹

*Yes, I believe in God. Why? Because I have a career.
There can be no better explanation or proof of the existence of God
than the fact that I have a film career.*

**US writer and director Kevin Smith
From 'An Evening with Kevin Smith' (DVD)**

The screen production industry is diverse and complex. It is a multi-sector – multi-occupation industry. Its project-based nature is an industry hallmark. It has a high concentration of independent contractors/freelancers and a predominance of small business operators. As such it is an industry that epitomises non-standard work¹⁰ patterns. For most industry participants there is a lack of employment continuity arising from the project-based nature of work. Small scale in terms of both industry scope and size and the funding base characterises the New Zealand screen production industry.

When you are dealing with short-term contracts you can't expect people to hang around waiting for you to be able to put in place another gig, when someone else offers them one. It is volatile and it is competitive. It is small.

In my job, we have got to really perform. We are supposed to be really efficient. That is why the New Zealand industry exists at all, because we are more efficient than other industries. It is a luxury. The money is so tight now. We spread it out so sparingly. We agonize so much over the budget. You really want the best that you can get for that money.

Screen production is a highly competitive industry at the global level and external factors can play a significant role in the industry. Government incentives, tax treatment and subsidies, and importantly, funding regimes, can be critical to the growth and development of the domestic industry.

What is happening now is New Zealand is out there, Hercules and Xena did a wee bit...I am holding my fingers out like a millimetre, compared to Lord of the Rings and I am going for the full four inch extension and so we are out there now as a location but as I was saying before, we are out there competing with Toronto, competing with Montreal, competing with Vancouver, competing with Israel, competing with Florida and competing with South Africa, competing with Ireland definitely. We are not competing directly with Ireland. I have never been in a situation where they have gone New Zealand

⁹ For a good summary of the New Zealand industry see Pinflicks Communications and NZIER (2003: 5-8).

¹⁰ Defining non-standard work is itself problematic (see e.g. Firkin et al. 2002) and non-standard workers are a disparate group of people. Non standard workers do not work full-time for a single employer or have explicit or implicit employment contracts for long-term work, and we can couple this with the working arrangement that does not adhere to the eight hour workday with standardised starting and finishing times i.e. do not conform to a standard employment model.

or Ireland but the sort of films that we have made in Ireland are the sort of films that could get made here. Ireland's population is 4,000,000, the same as New Zealand and their average wage is exactly twice what the New Zealand average wage is. This is interesting because they have subsidies to attract filmmakers and they are a very big industry. Things like Saving Private Ryan.

Macroeconomic variables such as the exchange rate impact on the industry and add to market uncertainties. Other external considerations such as technology changes also impact strongly on the industry.

The screen production market is segmented - made up of domestic and foreign (run-away) productions, with the latter frequently offering a positive wage premia to workers. This has implications for domestically based producers who as a result have to face up to peaks in the demand for skilled labour and cope with short-term skill shortages, yet bear the brunt of the costs of up-skilling, and maintaining the labour force in downtimes.

Intensive work and long working hours is often characteristic of many jobs in the industry. This can arise both from the project nature of the work as well as passion for the job.

We do a lot of all-nighters here and certainly it is not even out of the normal to be working a weekend. ... just love it and they will do 10-12 hour days. It is not unusual.

5. GENERAL FINDINGS AND ISSUES

This section presents the generalised themes and findings that emerged first in relation to the workings of the labour market and this is then followed by information and discussion on tertiary education and training provision. The next two sub-sections move on to deal with issues at the level of the individual – traits and characteristics and expectations. The subsequent sub-section highlights the significance of social capital, which is a very necessary complement to the acquisition and use of human capital in the industry. Finally, it is emphasised that good employee practices can make a difference to the quality of labour that the industry can attract and retain.

5.1 The Nature of Labour Market Imbalances

Labour market imbalances or labour demand-supply imbalances – the perceived skills shortage or surplus of people in various occupational types in the industry sub sectors are presented in the following section 6 of this report. This section presents both an overview for interpreting those findings and the overall themes that emerged.

Context: Imbalances of labour exist within a context. Shortages and surpluses must be contextualised in relation to the amount of production going on within each sector at a particular period of time and also within the whole of New Zealand on an industry-wide basis. A skill shortage exists when it is not possible to find a person with the particular skills that are demanded *at the going wage rate*. The screen production industry is an industry characterised by demand uncertainties arising from the nature of project-based work and hence fluctuations in the demand for labour and a lack of continuity of work. The industry is one of activity peaks and troughs. Particular skills shortages may be *short-term*. The quote below, which is from the commercials segment of the market, encapsulates this in colourful terms:

...but I guess it is the tricky nature of the industry in the way that no one will have shot for a month or two – it will be dead. Then suddenly the advertising agencies, all their clients, all decide that they want the job done, shot the same week, there is no cohesion and suddenly you can ring up and get any crew member you want, you can get the post booking you want, the luxury of the gear...a week later, it's a shit fight

Differing Perceptions: Opinions differ on the nature of labour market imbalances in the industry and in fact there is at times an element of confusion in the use of different terminologies in this connection¹¹. While there was a general expression that there was a shortage of people with high skills and experience, there was also a feeling that there was no shortage of such people in the industry given the level of work. With a shortage defined as demand for a highly skilled and experienced labour in the industry exceeding supply, then the quote from one of the interviewees - a freelance producer, highlights that these people always tend to have ongoing work:

We don't have a shortage. The thing is, there is not much work, so there is probably enough work for those people...but if there were talented, highly

¹¹ See Department of Labour (2002: 7; or 2003: 14) for a good explanation of different terms and implications of skills shortages.

experienced people, you would expect them to come through. You would expect them to have work, so it is a kind of a small pool, and all those people are quite busy...I don't feel any pressure from anybody breathing down my neck and I would expect to.

Those who are sought after, i.e. experienced and skilled, are small in number and there is only a limited pool to service a small number of projects at once. Furthermore, those with a proven track-record of performance are used regularly, this limits the opportunities for those at a lower end trying to enter the industry.

I interview, I tell them, I would like to work with you, but we operate on a freelance basis and if there is enough work for you, I'll definitely give you a call, you will be on the top of the list. So generally it comes down to just not being enough demand for their skills.

Magnitude: The small size of the New Zealand industry also has a bearing on specific skill shortages and the magnitude of these shortages. Difficult to fill vacancies – a genuine skill shortage as there are insufficient job seekers with the required skills, can amount to only a handful or less, of people in a particular occupation as highlighted below:

The specific areas that are often difficult to fill, colourists, people who grade film onto tape, so sounds like a pretty basic concept, here is the film, put it up, play it down, colour grade it onto a piece of paper, what could be hard about that. It is a critical piece of puzzle when you are working through in post, whether it's a commercial or whether it's a programme series or a telefeature, people are really particular about their baby...

The reason that colourists are few and far between, is simply because there is what...three companies in Auckland that run telecine, and one in Wellington. Pretty much, that you would consider to be the post houses of standing. And you need to work it out, even if one of those facilities has two, three telecine, that is only, what, three, four, five telecines that need perhaps a couple of people on each. You are only talking 10 or 12 people in all in a New Zealand context. Some are home grown, but many of them are imported. And if we...we have now, one home grown, if you will, colourist and one imported from the States, who came to us in January of this year and that's what we have to do, if we want somebody of any experience in that area, we have to go off shore to do it.

Surplus: There does not seem to be a shortage of entry-level people in any of the sectors. There is a surplus of people with little prior experience in the industry but usually with some tertiary level qualification:

There is a definite surplus of young people coming in, sending CV's, writing, ringing, saying I have just done this course and I want to get into the film industry. It is endless, it is a tidal wave of them, and I feel sorry for them because you get to a point where you don't even want to see them because there is just too many of them.

5.2 Tertiary Education

Course Proliferation: All of those interviewed mentioned that there seemed to be a proliferation of courses related to the screen production industry over the last 10 years. This has led to a significant number of graduates wanting to enter the industry. It was not uncommon for some production companies to have a person or CV per day coming through their facility.

Entry-level Skills Provision: In general, the tertiary education system was usually seen as a provider of entry-level people with a low skill and experience base. There was widespread opinion that tertiary courses provided foundation skills that needed to be built upon in the form of on-the-job training and experience. On-the-job experience was considered the most effective method of developing skills.

I do feel sorry for these people wandering in, they have got no practical experience but they have been in a tertiary institution for six years getting these skills and then all of a sudden they find that they are getting the tea or something.

Relevance and Accountability: Relevance to industry of some of the skills and material being taught was often questioned. There were also questions of accountability to fee paying students. Sectors such as post-production and animation signaled that graduates from most institutions were being taught skill sets that were not relevant to the needs of industry. A number of people interviewed felt there was a need for:

- more on-the-job components added to current courses.
- better links between industry and training providers.
- incentives for production companies to bring young people on board.

...there is not enough of a link...companies, whether it is a small commercial producer company or a larger film production company like South Pacific Pictures, have to, in my opinion, have to be offered incentives to take on trainees on every single job and every single level.

Training – What has worked?: Best practice and success elements of training courses conducted by the tertiary sector involved:

- Specifically targeted, training identified by industry, to their requirements. These courses also usually have a small intake of students.
- On-the-job components e.g. internships.
- Industry partnerships e.g. to reduce equipment investment costs; to provide short, specific training by a provider in the workplace itself.

A stream of benefits to the *employer* from trainee schemes such as internships was highlighted:

- They are a good source of low-skilled cheap labour. Production companies cannot afford to take-in and keep-on many employees due to budget constraints.
- Interns/Trainees provide a lot of good creative input as they are often young people who are very enthusiastic and keen.

Also, people cannot afford to keep a whole lot of people on staff. This is where this internship with this guy that we have got, has been brilliant and incredibly valuable, because he is actually going to be a huge benefit to the industry as he gets older – an excellent guy... also we are finding that these people have got so much valuable things to offer. They really have a lot of valuable things to offer because they are young, they are keen, they are enthusiastic, they are full of ideas.

- They are an employment screening and sorting mechanism.

...Because there is just too many people trying to get in. Internship a great idea, so many people trying to get in to industry. Sorts the people who will make it by giving them experience.

In addition to the direct on-the-job training experience, the benefits to the trainee are its usefulness in relation to making industry contacts. (See also section 5.8 on ‘Know-Who’).

5.3 Suggestions for Improving Training Provision

Industry Input: Stronger industry input into training at all levels and particularly with the industry driving mid level up-skilling - needs to be industry based.

It has to be industry based. There is no question about it. Like anything in training, if industry doesn't have an input then you ain't going to get industry ready employees. And that is the problem that we come up against with graduates in various courses. They just aren't ready.

On-the-job Skills Development: On-the-job training and experience was considered the most effective method of developing skills. Collaborative application and cross-fertilisation of ideas in the working environment was invaluable. Most felt that internships or similar trainee schemes were a good way of acquiring practical industry relevant training (see also earlier section 5.2 on ‘Training – What has worked?’ and the benefits of trainee schemes).

On-the-job Components: There needs to be a stronger internship or other types of on-the-job training component to training courses:

...a 3 month internship by someone who has done 2 years of technical training, it should be the other way around, if they want a job in the film industry, they should have 2 years of internship and 3 months of tech. training

Career Directions: Tertiary courses need to provide good career pathway information and experience to allow students the diversity to choose what segment of the screen production industry they could aspire to work in.

Foundation training: Foundation training for the industry in courses is a good idea. Training programmes should involve supplying foundation skills and giving people on-the-job training which will allow them to work their own direction out from there. Having a good knowledge of the overall production process and what everyone does in the industry is a good way to progress.

Entrant Screening: People need to be screened before entering into courses. This needs to be done in consultation with the industry and also take into consideration the skills that cannot be trained for in this screening process.

I don't think they should be open entry, I really think people should be selectively picked...It should be screened with industry professionals involved. It is no good the academics rigorously screening because they are not really going to know on a one on one level what is required.

Practical Skills: Screen production is an intensely practical industry. Courses need to train for this. Problem solving skills for example are important. Students need to be trained to be outcome focussed and deadline stringent.

Overseas Expertise: Overseas people with a range of experience and those associated with large budget international run-away productions can contribute to the up-skilling of local industry people.

Sectoral Cooperation: There must be sectoral cooperation to provide on-the-job training. For example, because the television commercials sector has such short production schedules, it could be an idea to share an apprenticeship or internship scheme with film.

Mentoring: Training could be undertaken at an entry level by mentoring, watching and observing and then participating. Some form of mentoring scheme for mid-high up-skilling is also needed.

A Coordinating Body: There needs to be a body that provides a base mark for skill sets and to coordinate the communication of information on various training courses and papers that might be taken to get the necessary industry relevant skills:

For me it is a conflict between the academic approach and the practical approach. It always has and it always will be and basically in the academic institutions, they are there for inspiring study, inspiring input and inspiring analysis of the output, just like ... of the novel in the English department, they look at what peoples come out and they look at how television has come out, whereas we are into a creative industry in which to create the show is another

process, it is not of analysis, it is of creative input and relationship and so you have the two things balanced and that is...I think balances tend to be an analysis, when you do three years and if you are doing a three year degree, I suppose you become an analyst of TV, but in the practical side, the practical things is...can be taught quite quickly, and getting a body that can actually coordinate that and be quite clear that this is an analysis course, or this is TV criticism 101, and this is TV production 101 and this is the one that you make, and this is the one you learn the questions and the way you put them together and the world view of that should be much clearer. At the moment it is not.

Apprenticeship Schemes: Apprenticeships tailored to the nature of the industry for technically oriented occupations in the industry should be devised and a coordinating body for managing these apprenticeships should be created. See also Conclusion for further elaboration.

Short-courses: Short-courses to fill current shortages in occupation and skills areas where there was high inter-occupational mobility (see section 8 for further explanation on the inter-occupational mobility and the flows to and from the screen production industry and occupational labour markets), was considered a good option e.g. short courses to give accountants or those in accountancy related occupations, an understanding of production accounting in the screen production industry. These courses would cover the range and roles of those involved in the production process. It was considered imperative that those who entered from other industries to fill screen production industry positions should have a thorough understanding of the industry's production process and associated roles.

Role of Industry Organisations: Industry guilds and associations are already playing a useful role in up-skilling and training of industry participants. For example, the Writers' Guild has recently organised the Linda Aronson August (2003) Screenwriting Workshops and Seminars and there is also the NZ Screenwriters' Laboratory. With respect to screen producers the SPADA Discussion Document– 'A Strategy for Upskilling Screen Producers' has already set out the issues and options, and argues that SPADA 'is well positioned to devise and manage a structured modular approach to producer professional development for mid level working producers' (SPADA n.d. p.4). The activities of these organisations should be recognised and better supported.

Te Reo and Tikanga Maori: The Maori screen production industry (SPI) felt that on the whole, there needed to be an investment in courses to train those currently skilled and experienced individuals with cultural and language competency frameworks to work in the Maori SPI. See also section 6.3 for further elaboration on this point.

5.4 Other Skills and Training Related Observations

Interviewees mentioned several other points in relation to skills and training for the industry which were not specifically included in sections 5.2 and 5.3 above but nevertheless deserve separate highlighting. Hence, these are briefly listed below:

- The industry is very competitive with a lot of players especially in Auckland and not a lot of money going around. It is therefore difficult for people to get breaks. This means that it is hard to see what people can do and what they are capable of.
- Entry points into the industry are considered very competitive. It was suggested that too many students were being turned out of training establishments without the availability of work. Entry level people are only given on the job training usually when there is a long series running e.g. Marlin Bay, Xena.
- Low budget features could be a good place for this initial on-the-job training to occur.

...like a low budget feature, is the best training ground you could possibly have. There has to be some funding for training, written into the companies...

- Budgets are too tight for any kind of direct investment for training from production companies.
- Most graduates find that when they begin, it is towards the lower end of the scale as runner or production assistant especially in television and film. Up-skilling occurs through observation and direction as they progress up through the skill and job ranks.
- Some felt that there needed to be more dialogue within the industry in relation to what a coordinated industry driven approach might look with regard to models of on-the job training and internships.
- It was felt that high-end up-skilling needed to be on-the-job based. This meant that either the New Zealand screen production industry needed to attract high profile international names with the desired skills to work here, or that people needed to be sent overseas to work on projects there. On the whole, the largest barrier to attracting international names here was considered to be the lack of continuity of high-profile feature films.
- There were concerns expressed over the impact of the new Maori Television Service (MTS) on the available number of skilled individuals who could service the new channel. It has been anticipated that 140 positions will need to be filled over the next 2 years. This could potentially place a strain on the resources of local production.

5.5 The Box You Cannot Tick: Personal Characteristics and Personality

I just worry sometimes about skill based training, you can tick boxes, you can set up a system where, okay, this person can switch on an edit suite, tick that box, tick the next box, but there is something in the screen industry that just is something a little bit different, a little bit of creativity that can't be ticked, a box that can't be ticked. That is the individual and you can't ever assess that... You can actually enjoy being in the medium. Creativity and passion and things, they are something that you just can't tick (Interviewee).

These are the personal characteristics and inherent personality traits identified by interviewees as necessary for success in the industry - qualifications boxes that do not get ticked by trainers in the tertiary education system:

- Creativity and flair. Most positions in the industry demand this attribute.
- Can-do attitude and initiative. People can be hired simply on this characteristic. As one television producer mentioned:

...The ability to go out and find a story, that is really, really slack. The ability to go one on one and get out there, to drive, to find the story, is really essential, and that is not trained very well at all.

- A good communicative and open personality. The industry is personality driven:

Unfortunately it is sort of personality driven. You get a sense of someone, you either like them or you don't like them. That is just how it works. It is all just down to personalities and trusting, wanting to work with people

- Passion, drive, determination
- Self-motivation/management
- People skills and not a 'know-it-all'

You have got to understand that you have got to work with people first and foremost, that is the most important thing. If you can get on with people and respect people and give them some creative space, be part of a team, then chances are, you will do well, but if you go in there thinking you are Jack Shit, then people just won't work with you. An editor will not work with you, a cameraman will not help you. Let's face it, we all need help.

- Flexible, good temperament 'as there are a number of egos in the industry'
- Lateral thinking

5.6 Expectations

Job expectations especially on initial entry and perceptions about the nature of the industry itself, have a significant part to play in the sustained success or otherwise of individuals in the screen production industry. Expectations also play a role in the successful matching of people to job vacancies.

A number of graduates come out of courses with unrealistic expectations about first jobs. Most find that when they begin, it is towards the lower end of the scale as runner or production assistant especially in television and film. This might not be palatable for some individuals.

They come through, they say, I have done my two years, I have paid my money over, I am an animator, and they are surprised at what they are asked to do...and it is very difficult as an employer in this country to ask people to do something extra, but the fact is, if we don't do anything extra the company will disappear, just like those students jobs will disappear.

The glamorous perception of the industry, also leads to the job expectations that are not initially feasible e.g. in the costume department people want to work on set, and do not want to be sewers. However, graduates who goal set with realistic expectations and a desire to work their way up are often most valued in the industry.

5.7 'Know Who' - Social Capital

A high level of social capital is vital for entry into and successful involvement in the screen production industry. Social capital is the ability to secure resources, or benefits as an outcome of people's membership in social networks or other social structures (Portes, 2000; 1998). The importance of on-going relationships and personal contacts in the industry is aptly demonstrated by the following interviewee quotes:

We all know each other, all the producers know each other well, so you can just pick up the phone and say, hey, we need an art person, who have you worked with recently that's good.

...it's more down to relationships and how you've worked with them before – whether you work with them or not, it comes down to the most important individuals being available – doesn't it? 'Cause you would never...I mean, I'd never...if for instance Art Department was really important, we would never...you know...we wouldn't go with somebody we hadn't worked with or didn't know. You simply wouldn't take the risk. We would change the shoot date.

It is an industry about 'who you know'. Entry into the industry relies to a large extent on getting to know people in the industry and hence internships and similar on-the-job placements as part of the tertiary course are valuable in this respect.

A small number of experienced people with a good past history of work receive regular contracts from production companies. These people are always in demand. It

is very much an industry of not taking risks, with people that you know will deliver always hired. Because of the short-term nature of independent contracting, one mistake by a crew member can cost them future work with that company whereas in a standard employment relationship, such a person might get a chance to prove themselves again and ‘redeem’ themselves. There is a large emphasis on preserving relationships and not taking risks. However, connections may also mean that there is no necessary correlation between experience and ability:

Having said that, commercials also have what I call the director’s girlfriend syndrome. Somebody might be highly experienced and absolutely pretty useless at the job, but because she has got a foot in the door through her boyfriend being the director or somebody...the agency producer’s girlfriend or something, then she will get given a go and she might do really well and she might be a disaster. In the end it is always an industry about who you know.

The importance of contacts and informal recruitment processes in the industry is also borne out by overseas research (e.g. Blair et al. 2001 and Blair 2001, where the title of the article: ‘You’re only as good as your last job’ says a lot about how the industry works and captures the essence of the importance of having connections within the industry.

5.8 Employee Practices

Employee practices especially in terms of employee up-skilling, satisfactory remuneration, work conditions and duration, impact strongly on the quality of labour that an industry can obtain and retain. Our findings seem to indicate a lack of good practice in several instances, though this was likely due to the stringent budget constraints faced by industry sectors and also to project-based uncertainties. Employee practices are an area that definitely requires further research for the screen production industry. The following quote however provides an indication of the attitude of one employer in relation to employee training practice – we nevertheless emphasise the exercise of caution when it comes to any generalisations:

... what they would do is they would get a whole lot of really inexperienced people, probably just out of courses, they would probably be paying them next to nothing and you would have to nursemaid them as a director, I would have to nursemaid these people through and the director of photography used to do that as well, nursemaid it through and people would sink or swim, but at the end of the production some people were quite good, they had come ahead in leaps and bounds and they are actually helping you out, but what would happen is they would turn around to ...(the employer) and say... okay, now I have gone the hard yards for you, I have got some skills now, I think I should earn a bit more money and they would say, no, no, you are out the door and we are going to get a whole lot of other little bunnies in and the same thing happened again.

The following section discusses the findings and issues that pertain to each of the industry sectors as well as the other stakeholder segments included in the study.

6. SECTOR SPECIFIC FINDINGS AND ISSUES

This section presents further detail for the six industry sectors: film, television, Maori television, television commercials, animation and post-production. For each of the six industry sectors, the labour market imbalances listed are those that were identified through analysis of the Tick Sheets (see Appendix 1) as well as the interview material. Since our interviewees were from the Auckland region, it is safe to assume that these imbalances relate to the region, though their generalisation nationally is not unrealistic either. The relevant highlights of the interview material from the representatives of tertiary education providers and the careers services sector are also presented in this section.

6.1. Film

6.1.1 Labour Market Imbalances

Shortages:

Medium Skilled and Experienced – sculptors, make-up designers, scenic artists, props buyers, set decorators, set dressers

Highly Skilled and Experienced – production designers, senior producers, producers, production managers, post-production supervisor, model makers, sculptors, prosthetics

6.1.2 Other Findings

Entry: Entry points to the film sector for graduates are very small. These are usually runner positions and are limited to possibly 1 or 2 per feature film. Graduates are still considered to be unskilled.

Really on every job there is one runner, two runners, so you can only give two completely unskilled people jobs.

The Kiwi ‘can-do’ attitude and ‘having done everything’ can work against being hired in international productions. American production companies like to see that you can do one thing and be good at it.

The other thing that happens is that you get peoples CV's and it is the Kiwi thing, they have done all these different jobs and they are very proud of it and you don't know what the hell you want them to do. What is it that they are interested in? They have been a set dresser and they have been a carpenter and they have been a production runner, and it is like, it doesn't say anywhere in their CV what job they are applying for and what they think they might want to specialize in. People set that as a strong thing and it is, even myself have sold myself on the fact that I can do other shit. But on international productions they see that as a weakness. If you can show them a CV and you have done something seven times, you get the job.

High Skills and Experience: There are a number of highly experienced Kiwis working overseas in film who are head hunted. However many are working overseas to get the ongoing continuity of work that does not exist in New Zealand.

Auckland Skills Base: WETA studios based in Wellington have taken a lot of creative people from Auckland with the promise of ongoing work. WETA have taken a lot of sculptors and model makers and mould makers and a lot of the skilled people in New Zealand and Auckland have now worked for WETA in Wellington, which has left a void behind in the region.

6.1.3 Training Solutions

It was suggested that overseas productions be required to provide some on-the-job training opportunities and which can also include some mentoring and ‘look and learn’ opportunities at the higher skills levels. Training ‘quotas’ might be considered as conditions for rebates and tax concessions.

6.2 Television

6.2.1 Labour Market Imbalances

Shortages:

Medium Skilled and Experienced – associate producers, directors, researchers.

Highly Skilled and Experienced – presenters, offline editors, producers, researchers, writers, directors of photography, production managers, vision mixers

Surplus:

Lower Skilled and Experienced – production assistants, runners

Medium Skilled and Experienced – sound technicians

6.2.2 Other Findings

Entry: Tertiary Training was seen as a provider of entry-level people with a low skill and experience base. The relevance of some of the skills and material being taught was often questioned. If anything, these courses provided foundation skills that needed to be built upon in the form of on-the-job training. It was sometimes felt that production companies were being expected to re-train graduates with work-place relevant skills.

I do feel sorry for these people wandering in, they have got no practical experience but they have been in a tertiary institution for six years getting these skills and then all of a sudden they find that they are getting the tea or something

High Skills and Experience: There are a limited number of highly skilled and experienced individuals who have proven work histories. These individuals are highly sort after.

What it comes down to, you want to work with people you like and so a lot of the time you go back to people you've worked with in the past because you know that they can deliver, and so that is why a lot of people who left TVNZ are still working, because they can deliver.

There is a certain amount of poaching of highly skilled and experienced individuals among firms.

Poaching is absolutely prevalent and you will...I will poach myself. If I am starting up a new production and I want a particular person, I will offer it to that person. I know you are off down the road doing this job, but have you thought about coming back over here and working on this? It is quite prevalent and it happens on our productions all the time.

A shortage of skilled and experience staff mean that lower – medium skilled people are being used and senior personnel are expected to spend time up-skilling and supervising. This can have an effect on the quality of production.

We have to bring on people that aren't necessarily as skilled as we would like... I think the overall impact is...some programmes fall by the wayside perhaps, because there aren't enough good, experienced people to make then a success.

Budgetary Constraints: Some local productions have faced budget cutbacks. This has forced lower skilled people to be used as a matter of necessity.

I want to use certain people, but I can't afford to use them because the budgets have been cut and all that sort of stuff, and so you get to a threshold of employment.

6.2.3 Training Solutions

- Industry – training relationships need to be reviewed. There needs to be an emphasis on more internship training within tertiary courses to provide students with realistic and relevant experience of the industry.
- Upward mobility in terms of experience and skills were best provided in the work environment with an on-the-job training focus. For those with medium to high level experience, it was considered imperative that there needs to be exposure to collaborative working opportunities with highly skilled international talent.

6.3. Maori Television

6.3.1 Labour Market Imbalances

Shortages:

Lower Skilled to Medium Skilled and Experienced - researchers, journalists and writers.

Highly Skilled and Experienced – directors, producers, floor managers, location managers, presenters, art designers, art direction, set designers, make-up/costume, directors of photography, camera people, lighting direction, sound direction, studio managers, sound supervisors, sound technicians, vision mixers.

6.3.2 Other Findings

Entry: Rangatahi or Youth Programming has become an important entry point for young Maori with Te Reo and Tikanga Maori skills.

In television only, because I can't speak for film, there is a huge number of people available to do Maori language stuff, particularly in rangatahi programming, broad base of skills from language exponents to presenters with the language to production assistants, to even directors with the language but don't have much experience. They can use that kind of genre, and rangatahi entertainment programme to up skill themselves. When you get to the far end of programming like documentaries, it becomes more difficult, really difficult, it becomes more skill based.

Due to the limited budgets associated with the commissioning of Maori Television Service (MTS) programmes, it was suggested that more low-skilled and experienced people will be used. This could provide an entry point for a number of people coming out of training institutions.

Te Mangai Paho aren't that realistic and MTS is definitely not realistic about what it costs to make a programme, which is why we have ended up getting entry level people to make programmes and that is what you will find with the majority of programmes being made by MTS, they are all at entry level because that is what we can afford.

High Skills and Experience: A lack of Maori producing in prime-time means that there is a lack of highly skilled and experienced Maori who are equipped for the potentially demanding nature of prime time production requirements.

The small size of the Maori SPI means that shortages are dealt with quite often by borrowing staff with experience from other production houses.

Well, that [shortage] has only happened to me once and as a result of that, I now go to directors and presenters that already have fulltime positions. When I do my stuff for TVNZ, I go and get TVNZ producers and directors that

already work in the Maori Programmes Department, and then I ask them to take time off and then I pay them, then they do my project and then they go back to their real jobs.

The Maori industry are very cordial to each other... a director could be working for four people at once, and it is not a conflict of interest for them because at the end of the day – same kaupapa (theme).

The skill requirements for each position within Maori SPI were no different to mainstream SPI. However, knowledge of Te Reo and Tikanga Maori were considered core components. Currently the Maori SPI is having to use a lot of non-Te Reo Maori speakers and those without cultural knowledge. This has led to Senior Production Personnel being expected to be cultural and language advisors throughout the whole of the production process.

I have gone out and hired the best [Pakeha] camera crew, knowing full well that they have absolutely no understanding of the reo, but have a good understanding of what is required and are sensitive to the kaupapa and are sensitive to the directors needs to be able to do something.

The new Maori Television Service (MTS) will inevitably use skilled people without Maori language and cultural competencies in the initial commencement period of the channel but only on a short-term basis.

...knowledge of Tikanga and Te Reo are very important boxes along the way. We have already identified that in the early stages, there are some people who don't have those, but whose particular skill we need right now. We have got those people and we have said to them, your tenure here could be very short because we are looking for people that have these important skills and when we find them, or once we have squeezed all the information out of you, you are on your bike.

6.3.3 Training Responses

- As of 2003, Southseas PTE has introduced a course called *Mahi A Rongo*. The development of this course was in specific request by MTS over concerns that there were not enough people in the industry with adequate Te Reo Maori and Tikanga Maori skills. The course has a pre-requisite that students must have conversational Te Reo Maori skills upon entry. The course curriculum is the same as the one year diploma however there are aspects of cultural competency included.
- At the time of writing a *Maori Movie Makers Training Unit Feasibility Study* had been release. Commissioned by the Manukau City Council and led by Don Selwyn, the idea is to develop a 12 month programme aimed at training unemployed South Auckland Maori in key aspects of film production. According to the study (Selwyn 2003):

The overall outcome for students will provide a knowledge of the basics in the film industry that will lead to pursuing specialisation and ultimate production control eg Production Company, Marketing Company, Props, Set Design etc.

The recent emergence of a number of successful locally produced movies with associated Maori themes and a lack of Te Reo Maori and Tikanga Maori skills by those currently working in the industry are core considerations in the development of this course.

6.3.4 Training Solutions

- The active encouragement for non Te Reo Maori speakers who are medium to highly skilled and experienced to learn Te Reo Maori. The development of an introductory course in Te Reo Maori and Tikanga Maori, with a screen production industry focus should be undertaken. This course could be a short course administered by a private training establishment.
- Any training activity and development of courses should be undertaken with a managed growth strategy in mind and in direct consultation with MTS. Although the demands of MTS are significant, this is by no means indicative of the ongoing continuous need for such a high number of individuals to service the new channel.

6.4 Television Commercials (TVCs)

6.4.1. Labour Market Imbalances

Shortages:

Highly Skilled and Experienced – production designers, set designers, set dressers, standby, costume designers, costume makers, make-up designers, construction managers, riggers, special effects, director of photography, registered riggers, executive producers, producers, directors, assistant directors, production managers, casting directors, location scouts.

Medium Skilled and Experienced – props buyers, best boys, lighting operators, genny operators.

Surplus:

Highly Skilled and Experienced – sound recordists.

6.4.2 Other Findings

Current Product Market Conditions: The TVC industry boomed during the 1980s up to the mid 1990s but has since peaked. The industry is looking very static at the moment, budgets are in decline and a lot of product is being made for an Australasian market, i.e. Australian produced for New Zealand market with a Kiwi voiceover.

There have been significant location movements of the TVC industry – first from Wellington to Auckland and now to Sydney. Direct marketing has also had an impact on big brand commercials. Due to static nature of domestic production, there is a large focus on growing international markets.

... certainly in advertising it was huge in the 80's and things have never quite ever reached that platform again, which was essentially, it was clients with an incredibly ludicrous amount of money and people were spending far too much really, for what they needed to do. Since then it has turned around and there is a lot more accountability, which is good, it should be that way. I wouldn't say...there is a slight downturn now because budgets are getting a lot more squeezed. It is a lot more tougher out there than it used to be...A lot of the big corporations have moved their head offices and marketing offices from Wellington to Auckland, from Auckland to Sydney. I think we are losing...my take on it is, is a lot of the marketing decisions have been made elsewhere and we are getting less...smaller budgets and I also think there has been the impact of direct marketing ...has affected big brand commercials.

High Skills and Experience: Growth of the feature film industry will be to the detriment of having skilled crew for TVCs. However it provides good up-skilling opportunities. There is also a tendency to lose people at a highly skilled level to film as this provides stable employment for longer than a TVC can.

... lose the people in the high level to a feature film. That is what tends to happen. We would never say, if we had a wardrobe person booked who we thought was fantastic and they had just been offered a job on a feature, then we are never going to say, well we had you booked for that job, how dare you turn us down for a years work.

It will be good for the crew but if the industry gets a bit busier here again, then you have got the problem of trying to get people. I guess for us, with feature films coming here, it's great in the way that it gets the crews skilled, it could only get better. But then on the other side, the selfish side, it means that sometimes we can't get anyone because when it is busy it is a real pain.

Proven expertise and *personal recommendations* are important in the sector. There are a small number of experienced people with a good past history working with production companies. These people are always in demand. It is very much an industry of not taking risks. People who are known to deliver are always hired. If it is not possible to get someone known to deliver, than depending on the position, even the shoot day might be changed. Employers would rather get someone in with high experience from Australia rather than risk placing someone with medium level experience in a job. Reputation is everything.

...it's more down to relationships and how you've worked with them before – whether you work with them or not, it comes down to the most important individuals being available – doesn't it? 'Cause you would never...I mean, I'd never...if for instance Art Department was really important, we would never...you know...we wouldn't go with somebody we hadn't worked with or didn't know. You simply wouldn't take the risk. We would change the shoot

date ... If it is a really important job, we are not going to take the risk of getting a medium range person to do it. We would rather get someone in from Australia.

6.4.3 Training Solutions

It was proposed that the TVCs sector should share apprenticeship or internship schemes with the film sector.

6.5 Animation

6.5.1 Labour Market Imbalances

Shortages:

Low to Medium Skilled and Experienced – cell animators, layout artists, composers, storyboard artists, clean-up.

Highly Skilled and Experienced – computer animators, animation directors, cell animators, model makers, animation producers, layout artists, storyboard artists

Surplus:

Low-skilled and experienced – inbetweeners

Medium Skilled and Experienced – animators, designers, motion graphics artists.

6.5.2 Other Findings

Current Product Market Conditions: Animation is currently an area of anticipated growth in this country although still is very small. The animation industry in New Zealand tends to rely heavily upon TVC's as a source of income. Future growth of the animation industry will be based upon attracting international productions. Key growth areas with significant potential are 3D motion capture animation and gaming.

The size of the domestic market and the cost of animation limit domestic funding and consumption of animated television series with a local focus. The New Zealand population is too small to allow for an industry that is dedicated to a domestically oriented product. There is likely to be always an international orientation of the industry. As such, international investment is seen as the only way to attract highly skilled and experienced staff to assist in the growth of the animation industry.

New Zealand on Air give the most pitiful amount of money, which is fine if you are doing a live action film... it only takes half an hour to produce half an hours worth of footage, but with animation, to produce half an hours footage, you are talking about six months with a crew of six people to...it is just too expensive.

Several aspects of current competitive advantage were highlighted. These were:

- NZ competes on origination of ideas and helping to develop series. This is a creative aspect and there is potential for growth here.
- Cost advantages for international work and the favourable foreign exchange rate. The NZ dollar being low keeps US firms interested as it is too expensive to animate in the States.

Our newest contract with Disney is being offered to us purely for the reason that prices in America are getting too high. At the same time, licensing rates for screening shows in America have dropped, so you have this...sort of difference from what the networks are willing to pay for a series and what it costs to make them. So they have to go to cheaper countries. New Zealand is the perfect place, our dollar, even though it has climbed recently, it is still quite competitive.

- Good knowledge of American culture gives a competitive edge over Asia.

Our biggest competitors are in Asia, they can do them a lot cheaper than we can, but one thing they don't have, or one that we have over them, is the fact that we understand American and English...most European countries, we understand the nuances of those countries, so we can produce pre production packages and animation production for them at good price.

A bonus that we have over a number of other Asia – Pacific studios is that we have good English skills and understanding of the American culture.

- High quality New Zealand produced product.

Everyone is very aware that the only edge New Zealand has in internationally acquiring work, is that we bring more quality to the party. We can animate in English, whereas some of the...well a lot of them don't speak English, so that is our advantage, and if we can't maintain the quality we have absolutely nothing to offer, because we cannot compete on deliveries.

Entry: Entry level skills required were strong design skills, basic understandings of animation, eye for aesthetics, perseverance and drawing.

At the moment what we have is a whole raft of inexperienced, low level, graduates from colleges and things, they are just not good enough to risk paying on a job at the moment.

Entry opportunities arise for some new graduates when there is an unexpected contract that could push employers to hire less experienced people:

Suddenly there is a big contract in and it is a 24 part series and you suddenly have to hire everyone and anyone that is out there and a lot of those people are directly out of training schools, and I don't regard them as being ready for international work, so not only are you dealing with having to compete with Pacific rim countries that have studios full of thousands of people, you are also having to compete and train dozens of people at the same time.

High Skills and Experience: A key obstacle to growing the industry is the lack of adequately skilled and experienced talent.

I've found it very difficult to find good people. We need the real cream on the top. I have managed to find and loose some great staff in the past three years because there's no work for them at some point.

A large deficit in skilled and experienced animators has led to people being brought in directly from overseas. The lack of an adequately skilled animation workforce is also compromising the product.

There just isn't enough animation talent out there in New Zealand to sustain a fairly large industry. So we are highly dependent on bringing in talent...using subcontractors, locally and offshore.

Training: Training is a significant issue for the sector.

Everyone wants to train people and we want good trained people. It is the biggest problem with the industry.

Several shortcomings of trainers and training programmes and problems associated with training were highlighted. These are listed below:

- Animation course graduates do not have an understanding of the way the industry works and the pace at which work must be turned out.

I find that every student that comes in and does some work for us, they are very slow, very inexperienced as far as working on their own, you need to basically sit with them and do it with them.

- Graduates have unrealistically high expectations.

Once they leave the various courses that are available, they tend to come to us with high expectations. We did this course, we paid X amount of dollars to do this course and we have got a certificate telling us that we are animators, and at the end of the day a certificate doesn't mean anything for us. They can have half a dozen diplomas in animation, but it means nothing. What really counts is if they can sit down on a seat and actually do some animation – that's what counts at the end of the day.

- Training has become an industry in itself and a lucrative one. It is easier to set up a training establishment than to set up and run a production house or studio.

We realise that it is easier to make money training animators than to actually do animation and that is a fact.

- Training course intake of students is too high, with few or no job openings for these students.

They are taking far too many people in for...they are producing too many graduates that are unskilled and there is no place for them in the workplace anyway.

- Many of the teaching staff within institutions have insufficient years of work experience as animators, or current industry working experience. This has led to a poor understanding of industry needs and relevant skills with many of the studios being forced to invest in training themselves.

...it is only because those schools don't have industry experience. It is fine teaching them something, but unless they are out there actually doing, knowing what the industry is currently like, then they are not going to be producing kids ready for that. It is a different story if we were to train people because we know what is going on in the industry and we know what's required...

- Training does not keep abreast totally of what is going on overseas; this is a benchmark as it is where New Zealand's industry is oriented.

...you really do need to keep your foot in there when it comes to what's going on overseas. And that's again, going back to the point about what's happening with the schools that are out here, they don't really know what's going on overseas.

... a lot of the people that are teaching in training schools aren't animators as such. They need to know how companies work internationally and the only way you can do that is by bringing in international animators. We have done that here ourselves as well. It is a very important thing.

- Training often does not use industry standard animation programmes (probably due to cost of licensing). Students are therefore taught on irrelevant software packages.

Scale: The small size of the New Zealand industry is a major constraint for this sector.

It is a horrible thing to say, but we are very isolated here and you do get left behind. It is funny, when I go to England or the States or whatever, to show to people I know, people who I have contacts with, they always make jokes about New Zealand. Asking questions like, do you have TVs there and stuff like that.

And it is very much like that because it is so far removed. We don't have our own internal creative industry we can bounce off.

Multi-skilled people are needed simply because of the size of the industry. There are often periods when there is such limited work 'that companies can do whatever', not just animation, to stay afloat.

There is need for a local focus and local initiatives for international markets that would grow the industry. This would provide continuity or work and projects from which people would become up-skilled.

I want the shows to be done completely within New Zealand so that we can take on those staff, we can set up pyramids where people trained at the bottom and move up the ranks and what we will wind up with at the end of that series, which probably is about a year and a half, maybe two years work, is a studio that is two or three times bigger than we are, which will then allow us to approach Disney or Warner Bros.

I see the way to evolve the industry in this country is to have New Zealand's own projects that we have control over, as opposed to contract work for Disney and Warner Bros, which might be affected by the fluctuations in the dollar or the ongoing problem where New Zealand cannot deliver in a 16 week period because there is a shortage of skilled animation staff.

Regional Critical Mass: Regional skill shortages are being dealt with by subcontracting and moving work around other production houses. However this is not always cost effective and raises issues of continuity and quality of product.

There is always the option of looking around New Zealand. There are a number of smaller studios who pitch in, but that alone...to farm out a scene and send it to the South Island or to Wellington, creates all the same problems that you would have if you sent it to India or...maybe not be language problems, but to send a scene down, get it back, have their fix ups, send it back down again. The whole thing is not cost effective.

6.5.3 Training Solutions

In-house training is seen to be the solution but the costs of this training is high and there is often a 'brain drain' after experience is acquired.

... like an in-house apprenticeship for trainees that have gone through...there are animation schools out there, the problem is they don't produce professional talent. It is almost like they teach the kids the basics and they come to us, not really being prepared for an animation studio, so they stand up to about...depending on the individual, about six – 12 months with us and they basically work and train at the same time. But we have found that to be fairly expensive, it costs on average about, per individual, about \$15,000. That is to train them up and that is per year. Originally we started with 12

people in the company and we have had about 60 people. I would say about 80% of them we have trained ourselves.

This is another frustrating point for us, because we are training these guys at great expense and after a few years they go overseas and do their OE. Which we can't stop. We can't stop them from doing that, but what it means is that we continuously have to put money into training new people to replace them. The upside of that is that with...we get a lot of new contracts through these people.

One interviewee mentioned that starting up their own internship or similar training programme was being investigated in order to make sure that industry needs are being met. Such a programme would be a cost recovery one with the student paying fees.

6.6 Post Production

6.6.1 Labour Market Imbalances

Shortages:

Medium to Highly Skilled and Experienced – post-production supervisors, film editors, colour graders, non-linear online editors.

Highly Skilled and Experienced – computer animators, animation directors, cell animators, model makers, animation producers, layout artists, storyboard artists

Surplus:

Low to Medium Skilled and Experienced – offline editors

6.6.2 Other Findings

Current Product Market Conditions: The post-production sector is facing a number of concerns for the medium term future. There is a relative amount of uncertainty at the moment, particularly in relation to television. Factors influencing this include the TVNZ charter and the rapid appreciation of the Kiwi dollar over the last 12 months. One person commented that although there has been a steady amount of work recently, there are very few significant projects being commissioned.

Right now at this point we are talking July 2003, the growth potentially is offshore because we have just had a very strong period of logform work... but I have to say that I am a little concerned looking forward in the next six months even, through to the Christmas period, there doesn't appear to be a great deal of domestic programme work coming up.

A culture of freelance editors seems to characterise the sector. Most people begin their work experience by working as an employee at a post-production facility before leaving to freelance. A lack of ongoing work however means that when large projects

finish, the market is flooded. Post-production facilities are in direct competition with freelance editors for the smaller jobs during the downtimes within the industry.

What tends to happen is we have got a culture of freelance editors and when I've had people to a certain level of skill, they tend to leave and go freelance. ...What happens is, is that those people can't get jobs. They may be well qualified, they maybe quite talented but there are only so many jobs and what's happening is for them to make ends meet, they are doing little jobs on the side, perhaps if they are into animation specifically they might buy their own computer and set up from home. That can...in an ironic manner, undermine what we are trying to do as a company because that takes away some of those little or lower end jobs that just keep you ticking over when you are not doing a big job.

The current state of the market impacts on investment in technological improvements. If clients are not willing to spend the money then there is no point in upgrading software etc.

You make the additional investment, but we are not necessarily reflecting that in our bottom line and you reach a point where you go, we want the best facility, but we also want some money in our pockets.

My observation is that all of us are now looking really hard at when we commit to updates and so on, because they do cost money. Good software packages and so on cost money, but also keeping your gear costs money and I know around the city that there has been hesitations in upgrading and we all probably force each other to take that step.

High Skills and Experience: A lot of highly skilled and experienced New Zealand editors go overseas to get to experience on international projects. This shortage means that staff from overseas is brought into New Zealand. It is not possible to compete with international salaries, however, the lifestyle is often a big draw card.

They cost more money typically, they do come down...no matter what you pay them, they do come out of the States and the UK and they take a drop in money. Relative to New Zealand, they still do very well, because they still get a good salary in New Zealand, but when you talk salary with them initially, they kind of go, well that is not a lot of money, 'cause they don't appreciate that it is cheaper to live here. You start comparing pounds with living in London and dollars for living in Auckland, it's pretty attractive and you can do some great things in this country as a visitor for a year or two or three.

6.6.3 Training Solutions

A lack of industry appropriate skills by new graduates characterises the post-production sector. It was suggested that this is because the costs of licensing software and adopting industry-relevant platforms is so expensive.

... someone wants to be an online editor, it is pointless spending 18 months – 2 years training on Gear at a tertiary institution, that isn't the same toolset that we are using here.

One post-production house offered this suggestion to deal with the use of inappropriate 'toolsets' in training:

Get some Flint licenses or some of the lower bond Discrete products because like I say, if you surveyed all the post facilities in Auckland and I suspect it would be the same in Wellington, we are all using Discrete tools now. There maybe other toolsets, but Discrete tools are the ones that we are using. There should be some starter kits for that at places that are looking at training editors

A coordinated approach with regard to training needs to be examined. Due to the cost of licensing requirements and the current mismatch between training and industry relevant skills, options need to be explored as to how training institutions can best deliver these skills in association with post-production facilities. An internship approach may allow a direct, industry-led development of these skills.

6.7 Tertiary Education Providers

Course Entry: Depending on the type of tertiary institution, course entry prerequisites vary (see also section 5.3 - *Entrant Screening* for industry comment on this aspect). For the university where one of the interviewees was from, selection was on the basis of examination marks:

...actually...the intake is only based on marks. That is how they get in. Also this degree, it is also capped as well, because we are so practical we can't take everybody that applies. It is the top marks from bursary that come in.

External Factors/Constraints: Important among the external considerations that affect training providers are government funding decisions. For instance the funding categories for different types of courses impact on course viability. According to one interviewee, the Government has changed funding criteria, resulting in funding for a main course moving into a general arts category, making it possibly untenable to run:

I think that the categorisation of film and television training into the arts is just totally wrong. Our new media course which only costs half of what the film and television course ...is categorised as being high technology and we get a much greater area of support for that and there is no logic to it. Film and television is the wrong category and I am very emphatic about that because I think we are going to suffer enormous damage if we keep being funded along the lines of general arts courses. It is not an art subject; it is a high technology subject.

Given the high cost of equipment which quickly goes out of date due to the speed of technology change, any reduction in government funding affects the profitability and viability of course offerings:

Already we have got problems because of the government changes in funding. How are we going to keep up the level of equipment here if the funding gets dropped that much? It is very difficult to amortise expensive equipment because equipment is out of date after three or four years now and the number of students that you train on it would never pay for it.

Government student fee moratoriums and ceilings for different categories of providers further complicate the provision of training for the screen production industry and discriminate against some providers. This has regional training implications as well:

I think the other problem we face enormously is we are having to agreed to participate in the moratorium,... has been a concern to us because we have seen another institution training in much the same way we have in Wellington, whose course fees are now \$1,500 more than ours per student, and we are saying, well we have had no real conversation for not being able to raise the fees because to maintain the quality of tuition and the facilities and equipment that we provide, is essential if we are going to maintain the industry relevance.

Under current compliance and bureaucratic regimes, both within the tertiary institution, but more especially external quality assurance requirements e.g. New Zealand Qualifications Authority – NZQA requirements and Committee for University Academic Programmes – CUAP requirements, for new programmes and major course changes and the like, have a long-lead time. This makes it difficult to respond quickly to changed industry conditions and industry’s constantly changing labour market imbalances – skills shortages.

Industry Links: The difficulties of establishing effecting communication and information channels with industry were highlighted. The advisory board as a mechanism for conveying industry requirements had shortcomings. There were for example problems with trying to get an advisory board together as all the industry representatives are very busy people. There was also scepticism expressed about the effectiveness of advisory boards:

...very suspicious of advisory boards as quite often they have a number of high profile people that sit on them that don’t have an understanding of production. Found it much more relevant to work closely and develop networks with lower levels of operational manage at the networks. Also keeping in contact with independent production houses and facilities needs.

In this connection therefore, the Taskforce proposal for the Screenmark Federation to provide a pool of industry experts with a code of conduct (see section 2.3 of this report), in order to effectively link with providers, is an admirable one.

The consolidation of industry links through tailored training to meet industry needs has been successful for all the stakeholder groups. The following is one such customised training success story:

When the Maori training thing came about, we were asked to look at again, doing something of a practical nature but with the extra emphasis that

Maoridom themselves had identified that there weren't enough trained editors for instance, who had the language skills so they could edit the programmes. Often Maori directors and producers were having to edit this...Pakeha editors who obviously had difficulties with the language as such and as well as trying to train up exciting new talent to make programmes...I think the beauty about it is that it has actually brought the Treaty considerations and the Treaty issues into an actual live and practical subject which is actually providing...rather than it being a theoretical thing written on paper which the students could never grab hold of, it is more, put it into action, and given it a life, which I think is benefiting the whole institution as a whole.

It was argued that providers already work with industry to identify industry training requirements and build links. This was particularly the case with one provider who provided workplace training and who had formalised a partnership arrangement for equipment sharing as well as an internship scheme:

We approached this already about five or six years ago and started working with the industry to identify areas that we said, well there is no way we can provide that equipment, but you have got the equipment and if it is available in down time can we start using it from training modules. TVNZ and TV3 are both very positive in their approach to seeing whether they can free up facilities for ongoing training and we have now got a formal agreement in place with TVNZ and TV3. ... negotiated an internship with the technical side.... The internship just started last year is exciting us, but on a practical front the internship is actually to formalise some of the steps that we are taking, but the first step was that TVNZ approached us and they were keen on our students having more skills and being able to use the studio pedestal cameras. Those are so expensive we can't afford them.

There are, however, also risks involved in following industry demands for training as the following quotation demonstrates:

We had identified that the industry was very interested in training on the higher end edit systems and we invested well over \$180,000 in a new editing system to train up and then the industry never brought the numbers of students...they were saying that they were going to provide so many and in fact we only got two from one of the bigger broadcasters and one other one. It was a disaster and it taught us a lesson in that it is tricky to...big new concepts, big new ideas, big new things need to be carefully researched.

It was asserted that the industry at times is quite unresponsive to education and training providers. Skills needs have sometimes also been felt to be commercially sensitive information. In connection to this unresponsiveness, therefore, the Screenmark Federation suggestion of the SPI Taskforce found favour (see section 2.3 of this report).

...industry has to tell us what it's needs are and I think the suggestion of the Task Force, of actually some sort of go between body is not a bad idea. They can say...put up for tender. For instance, the industry is short of editors, can anybody

supply or find a way of providing training for editors or camera people or what ever else, and we actually tender for that, that would actually work, I suspect.

One of the tertiary education providers stressed that industry links were maintained through teaching staff arrangements where many of the teaching staff were active industry practitioners:

I think also that the other thing about every lecturer here is that they are involved in the industry as well. That we are actually doing stuff with industry. At the moment we only have two fulltime staff, the rest are all part-timers and they are working in making their own productions, and their editing and their shooting and the...doing all sorts of other stuff so there is direct contact, links with industry all the time

The Special Nature of Tertiary Education: It was stressed that tertiary providers provide the broad competencies for working in the relevant industry sectors rather than overly specialised training:

...what we have here is a holistic course rather than a specialized course. The holistic course is reflected in, they learn every aspect of a production, but probably do not specialize in any aspect.

The aim of tertiary training was also to provide more generic thinking skills and the ability to be adaptable with a broad set of industry related competencies:

The other thing about a tertiary institution is that you are also teaching them to think and also to be able to learn for a lifetime. Life time learning, it is a catch phrase that is all around at the moment, but hopefully that is what we are doing here and that is what I would hope... Just say you train somebody up to be an editor, and then editing work dries up, you would like to think that you have got somebody who has got the skills or aptitude or ability to actually move on to become a camera person.

Not merely current industry skills demand but potential, future skills training needs had to be anticipated, planned for and built into course offerings:

Our approach here has been...we have to not be following the industry; we actually have to be ahead of the industry because we have to be training for the changes that we are going to have. We invested already, from day one when we started up this course, in making sure that, our technical operations manager is all the time liaising with industry...not just liaising, not once or twice a year having to ask a few questions or anything like that, but he has actually been given time to be involved in design aspects on projects.

Scale: As for industry, where the small scale of the New Zealand production base and market was highlighted as a constraint and the small numbers in particular occupations was also drawn attention to earlier in this report; so too was small scale an important consideration for education and training providers. The small numbers of students/trainees made some education and training options much less viable for providers:

...in some cases the problem is not just organising the equipment, the problem is, that even if they provide the equipment at no cost, the problem sometimes is that the numbers that need to be trained in that area are so small, that we can't cover the cost of the tutor. The reality of it is that if you looked at the total job market in some of these skill areas, there might be a total market of maybe two, three people a year in the whole industry in New Zealand in that skill sector.

6.8 Career Information

As explained in section 3, information flows that impact on training decisions and individual choices in relation to their training paths, are vital to understanding human capacity issues of the industry. One of our interviews therefore sought to come to grips with the wider careers infrastructure that underpins the overall information that goes out to the lower levels - to careers counsellors in schools and other areas; and other careers information that is available directly on a more national level such as the web-based interface with the prospective entrant into the industry or those seeking skills information about the industry. The other interviewee was chosen in order to gain a perspective on how information flows on careers operate at a more local level. This interviewee was a school guidance counsellor who works with students of all ages, in particular senior students to assist them on to a career pathway; and also a community activities officer, working with adults in education to help those who want to get back in the workforce and maybe change their occupation and look at alternative pathways.

At the national level, Career Services is a crown owned entity and *Kiwi Careers* is a government funded website, managed by Career Services. Within Career Services approximately 30 people are involved in the Careers Information Resource Unit, of which *Kiwi Careers* is a part of:

*Within the Careers Information Resource Unit, there are three entities that we distribute information through, one is **Career Point**, which is an 0800 number for people to phone in and get career information and advice. Through that they are put in touch with career opportunities, providers, possibly put in touch with career practitioners, both those who work for Careers Services and non Career Services staff and they heavily use the **Kiwi Careers website** and a database that supports it. The other avenue of...the second part of Career Information Resources is the area called **Career Resources**, which is the production of paper based publications, unlike *Kiwi Careers* and *Career Point*, it doesn't receive much government funding and so it produces, pretty much at cost, resources like *Jobs Galore*, *Courses Galore*, options packs and so on. It does receive some government funding for things like the *Career Quest Programme* and for a new kit called, *The Real Game*. It is a career game played within schools.*

The major nationwide careers information source *Kiwi Careers* uses the Australian and New Zealand Standard Industrial Classification system. Each industry is updated every 3 years and the information is revised and rewritten. Labour market predictions are undertaken for the next 3 – 5 years to get 'a feel for the growth of the industry'

using Business and Economic Research Ltd (BERL)'s quantitative model based on Census data. Qualitative data is collected from the industry interviews. See quotations below for further explanation:

*Kiwi Careers classification is loosely based on the ANSIC classification system - Australian and New Zealand Standard Industrial Classification. That has actually got 12 main industry groups, which really focus on primary and secondary industry. It doesn't really focus on tertiary industry, like the services. We had to tweak it a wee bit and we made it out to 16. Within those 16 groups there are 72 subgroups, which are really the industries. The reason we use the ANSIC is that we can then cross-pollinate our information with Stats New Zealand. Of those industries, there is 72 of them, one of them is called, **Motion, Picture, Radio and Television Services**. Within that area there, we would cover **some 19 occupations** to do with that industry.*

We run two types of research process. A rewrite and update process. Each occupation is on a three-year cycle so to speak. On year one it is completely rewritten, ripped apart, a researcher would probably go out and do a field trip...firstly meet with the relevant industry organisations, such as ITOs professional bodies, from there probably jack up interviews with appropriate people who have probably done the appropriate training and make good profiles. They go out and interview those people in the field, photograph them at work, come back, write that up into the template I just described to you... That information is then sent, usually firstly to the contacts to make sure that we haven't made a faux pas that embarrasses them, in case they have said something wrong or we have misinterpreted it. They get first right of comment. Prior to this, this has been through quite a bit of editing and toing and froing. When the people who have been interviewed are happy, we then send it out to professional bodies and ITOs and anyone else that we can identify with a vested interest, to have comment on. They feed that comment back to us. Then from there, when everyone is happy, we release and publish that information.

It was stressed that Career Services is committed to helping disseminate career information. It is therefore very much open to suggestions as how to co-ordinate industry and representative bodies to make sure the correct information is going out to schools etc.

Information that our interview with the local careers person yielded included the following:

- The school is focussed on getting students through the academic system with an emphasis on university at the end. A lot of data on non-academic related courses is not collected.
- Schools get a lot of information from all the larger universities and polytechnics. However, it is harder for the smaller industry groups who do not have as much money to spend on information resources and promotion.
- Careers advisors are very much dependent on the information they are given and sent.

- Schools need to take into mind trade related courses, these are often neglected in favour of more academically minded professions. This however could be due to the lack of information from trades related organisations to careers advisors.
- Work-based and other training institution visits are very useful for students to get a ‘bit of a taste with the real thing’ and to ‘expose students to as many different aspects of the trade as we can’. When questioned specifically about the exposure to the screen production industry the interviewee mentioned that:

At the moment we have got a group of about 14-15 students, who are going to go to ... because they are the closest television, media studies, sort of based workshop...company, that we have access to. So a lot of it is access and they get to ask those sort of critical questions when they are actually visiting those sorts of places. But apart from that, unless it is integrated into the studies...i.e. at the moment, we have got performance English studies, which is a mixture of media studies and English, there is very little opportunity for that.

- There is a need to develop industry links further in order to give students more in depth career advice and realistic perspectives on jobs:

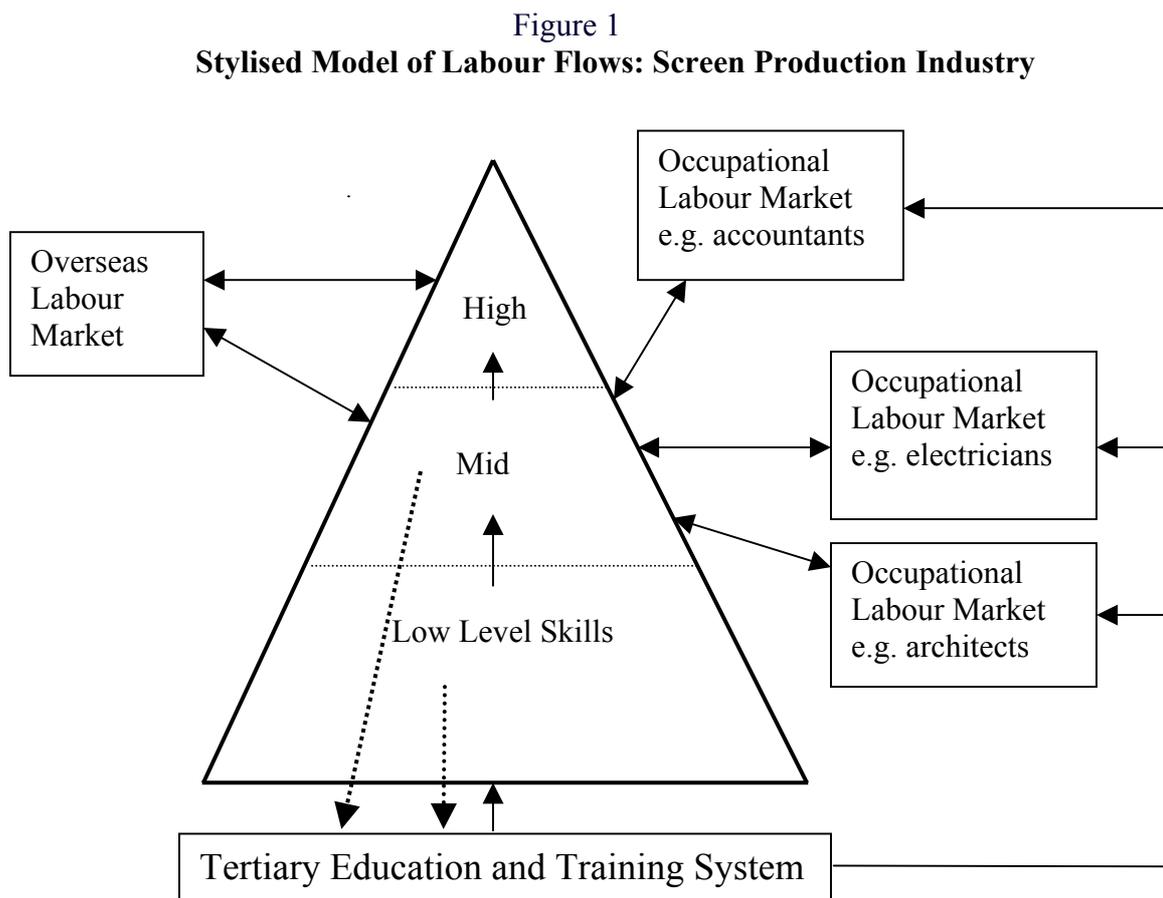
I think of a programme called Te Awaho (?) which has run for years, which is Maori driven and it is presented in a Maori way with motivational speakers. Many of these motivational speakers are people who have been front people for television programmes...we had people who fronted Pukana, talking to the kids and they were able to ask these people questions about all those sort of glamour sides, and these guys realistically answered the kids, that all the glamour...it is actually bloody hard work and when we are not in front of the camera, this is what we are doing, blah, blah, blah. So those are really invaluable days in terms of exposure.

8. A LABOUR MARKET FRAMEWORK

In this section a *Stylised Model of Labour Flows* of the screen production industry (SPI) is developed to provide a framework to understand the dimensions and complexities of the labour market. An explanation of the nature of skills is also provided to help understand the circumstances under which internal training is beneficial to employers and leads to up-skilling of employees.

Figure 1 portrays a skills pyramid/triangle with a tri-level of skills - low, mid and high level skills for the screen production industry. Flows to and from and within this skills triangle are depicted.

The education and training system, in the first instance, feeds into the triangle by providing entrants into the industry who despite their formal skills qualifications come in at the bottom end, low skills level as highlighted earlier in section 5.2. With industry experience and training there is then progression through to the mid and into the high skills levels.



Individuals who have received training in Occupational Labour Markets e.g. accountants, architects, electricians, feed into the SPI Skills Triangle especially at the mid-level. Thus for example, one of the interviewees whose job was a Production

Designer or an Art Director as the position is described in the American system, was a qualified architect when he entered the industry as a draughtsman on a big feature film shot in New Zealand. The small size of the New Zealand market however meant that it was not usually possible to have sustained work as a set director:

Other areas, design, set design I think, there is a little bit of a lack of fulltime experienced professional set designers, because it has tended to be a part-time job because there is not enough work. You do something else, you are an architect or a draughtsman or an interior designer or an industrial designer and you might get to work on one film every five years. It is an economic reality.

*You can't make a living because most films don't have a set designer. We had three guys on *The Last Samurai*, two of them...both of them had honours degrees in Architecture, one of them had a Masters of Architecture. They both...or two of the three were head hunted from Australia, they are Kiwis but they are working in Australia.*

The above quote also illustrates that the 'Overseas Labour Market' supplies some of the highly skilled labour required by short-term projects. It is standard practice in the film and television industry to bring in overseas talent on a project-by-project basis.

The overseas labour market is also an important source of more skilled labour for New Zealand's screen production industry on a more long-term basis. In the animation sub-sector for instance, one of our interviewees told us about Frank (not his real name) "who is probably our best technical knowledge". Frank came from Telecom, who brought him in from India. He had a background of architectural computer aided design and he has excellent skills in modelling. "... we know that modelling is a big requirement in the 3D area and everything goes through him and he can turn it around pretty quick. He has got lots of good experience and he brought a great deal of knowledge with him as well." Frank's case also demonstrates that the labour market is also influenced by exogenously determined factors – in this instance immigration policy.

As figure 1 shows, there is also a two-way flow between the overseas labour market and the upper ends of the New Zealand screen production skills pyramid. The following quotes highlight this:

New Zealand really does have a reputation of having skilled crews now and something that has started to happen is that we are being head hunted to work on other jobs like that film I was talking about, that we shot in Thailand. The production was based in Montreal, so the camera department were basically French Canadian, but they could crew from anywhere in the world and they did. There were people from Poland, people from France, people from the States, from Canada, from Australia, but encouragingly there were people from New Zealand and a camera operator was chosen from New Zealand, the art department were based in New Zealand, the line producer in Thailand was actually a New Zealand woman. I have worked on several American shows and...Samoa, Rarotonga, Fiji, where they have chosen a New Zealand crew by preference over Australia or America. We are regarded as having good skills.

There is also a loss of skilled people because there is no continuity of work. They go overseas to find full-time employment.

It has been difficult because there are some really good talents around, unfortunately most of them go overseas because they have got to pay their rent and I hire on a freelance basis, so if I can't get the work, they haven't got any.

Similar to the out-flow to the overseas labour market, there is also the flow out of the screen production industry to occupational labour markets. Thus for example as the earlier quote on set designers highlighted, a person educated and trained in an occupational labour market might return to that market for employment – ‘you are an architect or a draughtsman or an interior designer or an industrial designer’ when the project-based, set designer job contract is completed. There is thus *high inter-occupational mobility* of workers in the industry i.e. transfers between occupations.

A key question for the screen production industry is: How is upward movement within the industry skills triangle achieved? The answer to this question must mainly link to an understanding of the nature of skills. When firm-specific skills are involved it makes economic sense for a firm to up-skill an employee (leading to their upward movement within the skills triangle) and to incur the associated training costs internally. The desire to retain employees with these firm-specific skills, and therefore the offer of employment continuity for the employee is also an outcome, as illustrated below by the statement from one of the study's interviewees. The quotation also illustrates that firm-specific skills are often linked to the acquisition of appropriate technological know-how.

With editing, there are good editors locally and there are good editors offshore. It just depends on what suite you are running. There are a lot of Avids in New Zealand and there are a lot of Avid editors and...we tend to work as freelance in that area, that is the norm. We have got Avid editors that are employed here, but we also can hire them in, as we need them. In particular suites...we all have particular suites in the various facilities in the online area, if you have a Quantell Infinity or a Discrete Logic Flame or a Grass Valley 4000, they are all suites that have particular requirement skills. Once you have learnt those suites, you tend to be employed by that company because...for example, we are the only people who have a Grass Valley suite, we are going to want that particular online editor to stay with us.

Firm-specific skills produce returns on training investment by employers but by contrast ‘transferable skills’ are those that are mobile between the various employers/firms in the industry and are intermediate between completely firm-specific and completely general skills (Stevens 1996, 1994). There is less incentive for firms to invest in training to up-skill people to obtain transferable skills as they can be poached:

Poaching is absolutely prevalent and you will...I will poach myself. If I am starting up a new production and I want a particular person, I will offer it to that person. I know you are off down the road doing this job, but have you thought about coming back over here and working on this? It is quite prevalent and it happens on our productions all the time.

As transferable skills make poaching more convenient to the individual firm and implies the risk of a shortfall in training investment by employers, it calls for an exploration of the avenues available to externalise the costs of on-the-job training and/or to deter the mobility of the trainees. This will be discussed further in the final section of this report.

In concluding this section however, it is worthwhile pointing out that the training implications in terms of the transferability-firm specificity of skills argument is compounded by the nature of employment in the screen production industry. Project-based work, the freelance-independent contractor employment relationships and the lack of continuity of ongoing employment also results in: lower skilled and experienced individuals finding employment outside the industry during the down-times of the industry and a low incentive for up-skilling by employers for those shortages at the higher end of the market.

9. FORECASTING FOR MATCHING OF INDUSTRY SKILLS DEMAND

The screen production industry being largely a project based and an intensely competitive industry is marked by substantial uncertainty regarding the number and timing of projects and considerable variation in human resource requirements especially given the diversity of occupational skills demanded by the industry as a whole and on a project-by-project basis. Contracting strategies of both local and international productions and external market conditions also heavily influence activity in the industry. As the earlier section 8 highlighted, the labour market is multi-faceted and complex. As such, meaningful and worthwhile employment forecasting for the screen production industry is well nigh impossible, bearing in mind that industry employment forecasting even for industries that are more stable and less complex than screen production, is not easy.

It should also be noted that there is a high degree of disagreement among economists over the value and desirability of employment forecasting by occupation and skill group (see e.g. Papps 2001). If, however, employment forecasting is required by policy makers for the screen production industry, the only sensible model for forecasting skills demand would be a simple input-output matrix which specifies requirements of an 'average project' with 'each unit' of expenditure say \$100,000 requiring given skill/occupation inputs and particular groupings of occupations. Alternative market scenarios to inform the impact of uncertainties – conservative or base, moderate and high growth scenarios, can also be factored into such a forecasting exercise.

10. CONCLUSION

The screen production industry is a multifaceted, multi-sector; multi-occupation industry, for which the human capacity challenge of building a skilled workforce aligned to current labour market needs of its various sectors and to emerging opportunities, is complex and peculiarly problematic. Constraints, problems and challenges of the screen product industry product market, intertwine inextricably with those of the labour market. Thus heightened product market uncertainties arising from the project-based nature of the industry, and the small scale of the industry pose significant challenges such as how to ensure a continuous stream of projects and manage growth of the industry. Such challenges while closely linked to labour market and human capacity issues, are however, beyond the scope of this report. Nevertheless, the broad labour market implications arising from the nature of the product market, for example, the lack of employment continuity with a single employer, become significant when considering training solutions for the industry.

This section will synthesise the key issues that emerged from the research and discuss proposed solutions. Prior to this, attention is drawn to the *favourable climate* that exists at both the national and regional levels, as briefly elaborated in section 2. This will be conducive to advancing the sustainable growth of the screen production industry and the willingness and ability to deal with the human capacity issues and constraints faced by the industry. For example, the new requirements under the tertiary education reforms (section 2.2), is likely to involve greater flexibility of education and training providers to industry needs.

To provide an overview skills theme, the broad underpinning *experience competency requirement* of the industry is delineated. We then move on to discuss how this requirement might be met, and to highlight the major answers for addressing human capacity development for the screen production industry.

Experience competency requirement: In the modern workplace, generic skills or competencies such as communication and information technology skills, problem-solving skills and the skills necessary to work with others, have grown in importance. Our interview findings and a competency-based literature review, indicates growing consensus that there is such a set of generic competencies e.g. team work, computer literacy and communication skills for the screen production industry and as with most other industries, the screen production industry increasingly requires these skills. The education and training system, at an overall level, can address the supply of these skills. What distinguishes the screen production industry from many other industries, however, is the industry insistence and demand for high levels of on-the-job experience. Experience is the key competency of the industry and the key differentiator between skill levels – low (junior), medium (intermediate) and high (senior). This experience competency requirement is a prerequisite for most jobs in the industry. As highlighted in section 5.2, the tertiary education system was widely perceived as a provider of entry-level people with a low skill and experience base, with many tertiary courses providing only foundation skills that needed to be built upon in the form of on-the-job training and experience. Yet, gaining the experience competency, through on-the-job training and/or on-the-job learning, and satisfying

this experience requirement is enormously difficult due to several reasons as also highlighted in earlier sections of this report. These chiefly are:

1. The small scale and resource constraints of the New Zealand industry coupled with the project-based nature of work.
2. The lack of continuity of work with a single employer - which is linked to 1. above.
3. The small number of entry positions at lower levels of the industry. The small scale of the New Zealand industry is also integrally linked to this.
4. Know-who, on-going relationships and a general unwillingness to take risks with previously untried contractors and less experienced labour (see section 5.7).
5. The high transferability of skills in the industry, which acts as a disincentive for employers to up-skill employees and undertake on-the-job training due to poaching (see section 8: 51-52). The 'brain drain' overseas after training is also related to skill transferability.
6. The lack of a set of industry approved job standards. These would give consistent and agreed benchmarks for the competency requirements of jobs at the different levels – low, mid and high. This is a precondition for successful cost effective on-the-job training delivery e.g. through apprenticeships.
7. The lack of a training facilitator(s) or coordinating body/bodies for the industry. In some other industries this body might be designated as the industry training organisation – ITO, and is usually responsible also for the standardisation of job criteria.

Building the experience competency, in a nutshell, is the big challenge that presents itself to the industry as a whole and to the regional industry, in the human capacity domain. Yet to tackle this challenge requires concerted action on several fronts. We illustrate this through the discussion that follows.

Given the transferability of skills and the 'poaching problem' and 'brain drain' (point 5 above), firms are reluctant to bear the costs of on-the-job training. *Externalising the costs* of on-the-job training therefore needs to be explored. If the single firm/employer is not to incur the full costs of on-the-job training, however, there must be a 'fit' into government approved funding frameworks so that the cost of training is borne mainly by the government and the trainee. Yet, in order to achieve this fit there needs to be set of *standardised job criteria* – see point 6 above. In fact we might argue that there is *urgent* need to develop an industry approved set of job standards.

Steps to deter mobility could be taken in the case of internalised costs with firm sponsored training. There is nothing to stop a *bonding agreement* being put in place with the trainee, which will deter mobility over a specified period. Combining *good employee practice* (see also section 5.8) with training perhaps is a better way of lowering mobility, than more formal restrictive arrangements. The following interviewee quote encapsulates this well:

Certainly the skill based people, if they are good, you would want to hang on to them definitely, and it would piss you off if they got poached, but that is the reality of the thing. I think there is not much that you can do about...it is down to you to provide good projects and be a good boss and get along side

them and find out what they want to do. Hopefully the two will meld somewhere down the track.

Overcoming the barrier of the lack of continuity of work with a single employer (point 2 above) is necessary in order that on-the-job training schemes such as *apprenticeships* become viable. Trainees / apprentices can move between employers on the basis of the availability of work on different projects. The job placements and *co-ordination* of the trainee's employment relationships between different employers has however, to take place; but as listed in point 7 above, the industry lacks coordinating mechanisms.

The need for a *coordinating body* to deal with the human capacity issues facing the industry was a strong theme that emerged from our research. This is not a new idea. The Screen Production Industry Taskforce has put forward the Screenmark Federation (see section 2.3) to provide clear articulation and coordination of the industry's training needs. It must, however, be stressed that any future body needs to involve all training stakeholders as illustrated by the following quote in relation to the industry's former failed Film and Electronic Media (FaEM) ITO:

...there were two problems with FaEM, one was that it was driven by all the different skill sectors of the industry, but all of them were very, very protective of their piece of turf and so they wanted to have, to a degree, a very large say in exactly what they wanted in the training modules that had been advised and they wanted to do it without a great deal of reference to any training organisations. They felt that the industry had to drive this thing completely.

Giving prominence to the difficulties faced by the industry, including small size, capacity and resources, the Screen Production Industry Taskforce has also recommended that the 'Government work with the Screenmark Federation to develop ways of adapting the Modern Apprenticeship Scheme or developing an alternative tailored to the creative sector' (SPI Taskforce 2003: 61).

Best practice educational programmes for the industry were those with *work experience components* such as internships. Not unexpectedly, given the significance of the experience competency requirement of the industry, the strengthening of such experience modules was emphasised:

...a three month internship and someone has done two years of technical training, it should actually be the other way around, if they want a job in the film industry, they should have two years of internship and three months of technical skills training.

A *demand-led approach* has been advocated in order to address skills needs (Waitakere City 2003). The focus of such an approach is 'on the needs of the employer and how those needs are met with the available labour pool ... The emphasis is focused on on-the-job training and clear education provider/industry links' (Waitakere City 2003). For the screen production industry, particularly in some sectors where the skill deficiencies of graduates from the tertiary education system were of considerable concern, such a demand-led approach will be vital in *ensuring industry relevance of training*:

Like anything in training, if industry doesn't have an input then you ain't going to get industry ready employees.

As mentioned earlier in this section in relation to the apprehension about a completely industry driven coordinating body, it is worthwhile alluding to the possibility of a similar sentiment emerging here from training and education providers. There is the reassurance therefore, that the demand-led approach certainly involves strong collaborative links with *all* stakeholders and is not a solely industry driven approach.

Linked to the provision of industry relevant training, is also the need for appropriate levels of funding to providers, for screen production industry training:

... if true industry training is not recognised as being something different and not just a general arts course and the same funding levels categories and to that, it is damn difficult.

Many of the training solutions highlighted in this report involved *closer collaboration* with industry and education stakeholders to build work place experience and/or up-skill in the workplace. *Partnerships*, e.g. for up-skilling at the mid-high levels, specialised and advanced industry workshops/short courses for industry personnel which involve employers and/or industry guilds and associations, and a training provider; are a proven success. However, increased *employer commitment* is essential to the drive for building the industry's human capacity. It was noted that very little funding in New Zealand is available for up-skilling staff and that it is also often not a priority for time to be dedicated. As one provider we interviewed lamented:

...number one is, there is no money, and two, there is no time allocated. Time and time again we have been asked to set up training modules for companies and all that, there has been money allocated, but very little, but the problem comes when staff are allocated time to attend the training course, but when it comes to the day, well we are lucky if we get half the numbers that were promised because they have suddenly had to be re-rostered or anything like that, so the commitment to training is sporadic and somewhat haphazardly structured.

Improving information flows and communication channels between industry and providers is critical to increasing the industry relevance of training. The traditional mechanism for obtaining industry input for tertiary providers, has been an Advisory Board. These boards, usually with a high-powered representation from industry, are not always effective due to time pressures of these representatives and other factors:

...Boards, committees are often picked because there are some big names that they put on and the problem is that they don't really know the training requirements and operational requirements of their own companies often. ...far more relevant and pertinent information about changes needed for training content, ... come in from much lower levels in management."

The proposed Screenmark Federation offer of one representative point for consultation with industry and a pool of expert advisors, will undoubtedly go a long way to improving the efficacy of advisory boards and other means of communication with industry and providers. There is currently a pressing need to develop the industry infrastructure and processes that will support the new requirements under the tertiary education reforms and optimise the benefits of these changes to the industry. Implementation of the Screen Production Industry Taskforce recommendations, particularly those revolving round the ‘one-stop-shop’ Screenmark Federation, would be an obvious way to go here.

An important opinion that came across from the participants in this study was that as a part of the ‘breaks’ for international feature films and other foreign productions, there needs to be a guaranteed level of on-the-job training or learning for people to gain experience. A framework needs to be established so that people benefit from overseas expertise. *Training and learning contribution (TLC) from foreign productions* needs to be harnessed. *Mentorship schemes* and possible *intern/trainee quotas* could be given some consideration in this connection.

Foreign Producers’ TLC can play an important role in up-skilling New Zealanders at all levels, and foreign production is vital for up-skilling local crews. Furthermore, according to the New Zealand Film and Video Technicians Guild, the industry cannot increase the number of production units of varying crew size ‘without the craft development training provided by the long-term opportunities created by television drama series productions. There is no other available means of up skilling our workforce ...’ (New Zealand Film and Video Technicians Guild 2003). In the late 1990s, *Xena*, *Hercules* and *Young Hercules* are examples of such opportunities and these productions were also responsible for making a significant contribution to building the regional critical mass of the screen production industry in Auckland (Saipe 1998).

The major contribution of the tertiary education and training system was in the provision of skills and training to get a ‘foot in the door’ – entry level skills. There are thus a large number of inexperienced but tertiary qualified graduates wanting to enter the industry. Yet there is a dire shortage of entry points into the industry (see point 3 above). The anticipated investment of foreign productions can also increase the entry points into the feature film industry and other sectors. Key to optimising the benefits of this investment in terms of human capacity development however, is the development of on-the-job training frameworks so that the achievements and up-skilling of these graduates are recognised. Time honoured solutions such as *mentorship* should also be given a revitalised boost with industry groups and other stakeholders getting their heads together to come up with creative/innovative schemes to provide on-the-job training.

Improving Labour Market Information: Using the internet to match labor demand and supply and to increase the efficiency of the matching process clearly is the way to advance any improvement on this score. A centralised web site that for example collects and provides comprehensive information on job opportunities and education and professional development opportunities and supplies relevant employment and career information for job seekers in the industry, would be invaluable to growing

human capacity of the industry. It goes without saying, that this would be part of the role of the proposed Screenmark Federation.

Dealing to Unrealistic Expectations: Unrealistic expectations especially of those with only qualifications based skills that enter the industry, is of concern to the industry. Clear signals should therefore be sent out to those wishing to enter or are planning careers in the industry. In this respect, suitable careers advice should be put ‘out there’ so that the gloss of what might be perceived as a glamour industry is portrayed like it really is. Perhaps, a leaf out of the book of Skillset, the National Training Organisation for Broadcast, Film, Video and Interactive Media, in the UK, is pertinent. Skillset’s website and other material tell the story like it is. Thus for example advice on ‘What should you do to give yourself the best possible start?’ is set out in no uncertain terms:

Try to get practical experience in any way you can ... Be prepared to work for nothing in the first instance – remember you are the one who wants to learn. If you manage to get some work experience make yourself invaluable. Don’t sit around waiting to be told what to do – be observant and think what needs doing – offer to make tea, do the photocopying or carry the equipment. This will be appreciated and get you remembered, and hopefully asked back and paid in the future’ (Skillset n.d.).

In addition to appropriate New Zealand screen production industry internet-based information, realistic expectations can be conveyed more directly to aspirants considering options in the industry e.g. through workplace visits, industry speakers at careers forums and the like.

Regional Initiative: Not only does the small size of the New Zealand industry constrain human capacity building (see point 1 above) but regional critical mass is also a significant factor. For example, it was pointed out in section 6.5.2 that regional skill shortages can compromise the quality of the product. The promise of ongoing work elsewhere in New Zealand can also leave a skills gap in the region e.g. this was the case with the growth of WETA Studios in Wellington. Regional initiative for building regional capability is essential. At both the national and regional levels there needs also to be a managed growth strategy which would support on-the-job training.

I think it has to be managed growth. All these people who are...what would happen in industry normally this big, is you get...someone starts as a runner or a low...an apprentice, if you like. You could take in...I could take in 10 people every year if I had the work for them and within a year they would be medium level, two years after that they would be at top level. That’s how it would work

Firm pro-active rather than reactive steps, partnership and leadership¹² are required for advancing the screen production industry in the Auckland region. Winning first

¹² The concept of ‘municipal-community entrepreneurship’ has been put forward to capture the need for activism in promoting local economic development and employment growth, and involving active community participation (includes businesses), with explicit and leading support provided at the local, rather than the central, governmental level (Dupuis et al. 2003). Together with the wider partnership element that municipal-community entrepreneurship emphasises, effective leadership is an inherent

steps have already been taken. Most recently the Auckland Regional Film Summit identified an early forward action agenda that would start moving the screen production industry cluster towards the preferred future (see also section 2.4). Priorities were voted on, and initial action teams of volunteers were identified with people committed to taking the actions forward. For skills action, the 'Key Issues' identified were: Industry relevance; On-job-training development; and Management skills. The 'early action' to be taken was to advocate a training contribution from productions receiving the incentive of the production expenditure grant for large budget film and television productions. This action has subsequently been moved on - see **Appendix 4**. See also **Appendix 3** for other action from the group and an example of possible micro regional level on-the-job training initiatives.

Acknowledging that from a New Zealand perspective, both education and training providers and provision and the screen production industry labour market are beyond the Auckland region, it is nevertheless not imprudent to have initiatives to support skills building for the region. In other regions and other industries e.g. optics and the optical engineering industry, with the support of the Polytechnic Regional Development Fund (Ministry of Education 2003: 23), strategic regional partnerships have been formed. Within the tertiary education system, polytechnics and institutes of technology have a differentiating role at both a local and regional level and especially in helping to alleviate skills shortages in particular industries through collaboration with industry. This might then be a factor to be availed of in Auckland for the screen production industry. Alternatively, it could be possible for the industry sectors in the region to identify their preferred providers and collaborate with these suppliers in being responsive to needs of the sector. There have been instances of this already happening in the region e.g. see section 6.3.3.

As a beginning approach to identify the labour demand and supply imbalances pertaining to the region, an on-line survey could be used employing and extending the sectoral tick sheet occupational information (see Appendix 1) used for this study.¹³ Extension of the information would be mainly through the incorporation of questions to gauge the magnitude (absolute numbers) of shortages and to obtain some short-term simple predictions (the anticipated demand until the next survey period). Such a survey would convey a snapshot at an Auckland regional level of the current and anticipated labour market imbalances and also give an indication of the magnitude of the shortages. A list can be provided of skills that are currently of interest to employers in the region, in the different industry sectors. While some of the skills would be essential across a wide range of occupations, others would relate to a specific occupation. Given this information, individuals may be able to upgrade their

element. Leadership is also important for successful cluster initiatives. Municipal-community entrepreneurship is visible and is growing with moves to advance the Auckland region screen production industry cluster. In this connection the 'municipal' support that is being provided by AREDS and the other councils especially the Waitakere and Auckland City Councils, and the leadership of individual actors e.g. John Wadsworth of Enterprise Waitakere, and groups such as, hopefully in the future, the Action Teams formed at the Auckland Regional Film Summit (see section 2.4), will be important in building the regional critical mass of the screen production industry industry.

¹³ Part of this information gathering could well be covered by the Skills Demand Research Project that Massey University will be undertaking on a six monthly basis for the Waitakere Employment Skills Project.

skills while on the job; however, those skills that most employers expect employees to already possess - the skills they require prior to being hired, would also be identified.

The region can also *make the most of high inter-occupational mobility of the industry*. As explained in section 8, the industry is characterised by a high degree of inter-occupational mobility. This can be turned into a definite positive through specialist short courses/workshops in the region so that where possible shortages may be filled through a relatively low level of re-training of those in occupations outside the screen production industry (see e.g. Appendix 2: 2.1 – Production Accountant training solutions). *Industry associations and guilds* could well have involvement in this training and so too necessarily with other professional development initiatives with a regional focus.

In the interim period – prior to national level initiatives like the proposed Screenmark Federation eventuating, consideration might be given to a multi-stakeholder group to advance and maintain the industry’s educational and training needs in the region. Identification, planning and facilitation of training programmes to meet regional industry needs and also ways to enhance career guidance information, could be on the agenda of such a group. We conclude this report therefore, reiterating that the development of a sustainable and highly skilled creative workforce for the screen production industry, as for other industries, is the joint responsibility of all the education and training partners, employers and other stakeholders, at regional and national levels. It requires both coordination and cooperation:

The skills issues need to be tackled by a combination of industry, communities, training and education providers and government, again reinforcing the need for further attention to be given to cooperative arrangements and coordinated efforts (Knuckey et al. 2002: 205).

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APPENDIX 1 – SECTORAL TICK SHEETS

THE SCREEN PRODUCTION INDUSTRY: SKILLS SCOPING FOR THE AUCKLAND REGION

Animation

Position	Skill Entry Level (Low/Med/High)	Experience Required (Low/Medium/High)	Shortage/Surplus
Animation			
Animation Director			
Key Animator			
Animator			
Layout Artist			
Composer			
Storyboard Artist			
Model Maker			
Special Effects Animator			
Background Painter			
Animation Assistant			
In-betweener			

Positions added during interviews:

Clean Up Artist
 Motion and Type Graphics Artist
 Designer
 Animation Producer

Key Animator was also known as the Cell Animator

**THE SCREEN PRODUCTION INDUSTRY:
SKILLS SCOPING FOR THE AUCKLAND REGION**

Film Industry

Position	Skill Entry Level (Low/Med/High)	Experience Required (Low/Medium/High)	Shortage/Surplus
Animation			
Animation Director			
Animator			
Artist – Layout, Storyboard			
Model Maker			
Special Effects Animator			
Animation Assistant			
Art and Design			
Designers - Production, Graphic, Set			
Art Director			
Artist, Scenic Artist			
Model Maker/Puppet Maker			
Sculptor			
Props Master/Mistress			
Production Buyer/Props Buyer			
Set Dresser			
Costume/Wardrobe			
Costume Designer			
Wardrobe Master/Mistress/Costume Design Assistant			
Costume Maker			
Dresser			
Make-up and Hairdressing			
Make-up Designer/Chief Make-up Artist			
Make-up Artist/Make-up and Hair			
Make-up Effects/Prosthetics			
Set Crafts			
Construction Manager			
Trades people - Painter, Carpenter, Plasterer			
Special Effects			
Physical Special Effects - Physical, Pyrotechnic, Visual			
Technical Roles			
Director of Photography			
Camera Person			
Camera Supervisor/Senior Cameraman			
Unit Stills Photographer			
Assistant Camera People			
Video Playback Operator/Video Assist Operator			

**THE SCREEN PRODUCTION INDUSTRY:
SKILLS SCOPING FOR THE AUCKLAND REGION**

Post-Production

Position	Skill Entry Level (Low/Med/High)	Experience Required (Low/Medium/High)	Shortage/Surplus
Post Production			
Post-Production Supervisor/Co-ordinator			
Picture Editor			
Film Editor/Offline Editor			
Videotape Editor			
Assistant Film Editor			
Colour Grader			
Sound			
Re-recording Mixer/ Dubbing Mixer			
Sound Editor			
Dialogue Editor			
Music Editor			
Foley Editor (Post-synchronised Sound Effects)			
Foley Artist (Sound Effects)			

Positions added during interviews:

Non-Linear Online

Videotape Editor was also known as Avid Offline

**THE SCREEN PRODUCTION INDUSTRY:
SKILLS SCOPING FOR THE AUCKLAND REGION**

Commercials

Position	Skill Entry Level (Low/Med/High)	Experience Required (Low/Medium/High)	Shortage/Surplus
Animation			
Animation Director			
Animator			
Artist – Layout, Storyboard			
Model Maker			
Special Effects Animator			
Animation Assistant			
Art and Design			
Designers - Production, Graphic, Set			
Art Director			
Artist, Scenic Artist			
Model Maker/Puppet Maker			
Sculptor			
Props Buyer			
Set Dresser			
Costume/Wardrobe			
Costume Designer			
Wardrobe Master/Mistress			
Costume Maker			
Dresser			
Make-up and Hairdressing			
Make-up Designer/Chief Make-up Artist			
Hairdresser			
Set Crafts			
Construction Manager			
Set Builder			
Set Finisher			
Trades people - Painter, Carpenter, Plasterer			
Special Effects			
Physical Special Effects - Physical, Pyrotechnic, Visual			
Riggers			
Technical Roles			
Director of Photography			
Focus Puller/Camera Assistant			
Clapper Loader			
Camera Person			
Unit Stills Photographer			
Assistant Camera People			

**THE SCREEN PRODUCTION INDUSTRY:
SKILLS SCOPING FOR THE AUCKLAND REGION**

Television Industry

Position	Skill Entry Level (Low/Med/High)	Experience Required (Low/Medium/High)	Shortage/Surplus
Art and Design			
Art Director			
Set Designer			
Assistant Art Director/Standby Art Director			
Props Master/Mistress			
Production Buyer/Props Buyer			
Art Department Runner			
Make-up and Costume/Wardrobe			
Make-up Designer/Chief Make-up Artist			
Hairdresser			
Wardrobe Master/Mistress			
Technical Roles			
Director of Photography			
Camera Supervisor/Senior Camera Person			
Assistant Camera Person - 1st and 2nd			
Lighting			
Lighting Director			
Lighting Operator/Lighting Electrician			
Best Boy			
Riggers, Grips and Cranes			
Rigger, Grips, Rigger Driver, Stage hand			
Sound			
Sound Designer/Sound Director			
Studio Manager			
Production Sound:			
Sound Supervisor			
Production Mixer/Sound Recordist			
Boom Operator			
Sound Technician			
Technical and Studio Operations			
Vision Mixer			
Technical Operators			
VT Engineer			
VT Operator			
Writing and Production Roles			

Journalism			
Journalist, Reporter, Correspondent			
Presenter, Announcer			
Editor - Bulletin, News, Feature			
Executive Producer			
Producer - Series, Senior, Line			
Producer, Assistant and Associate			
Production Manager			
Production Assistant/Co-ordinator			
Managers - Floor, Location			
Director - 1st, 2nd and 3rd			
Researcher			
Runner			
Script Writer			
Script Editor & Supervisor/Continuity			

APPENDIX 2 - SELECTED JOB ANALYSES

A 2.1 Television Production Manager/Production Accountant

Shortages of good production accountants seemed to be characteristic throughout all sectors of the screen production industry. Looking particularly at the television production sector, most production managers seem to double up as production accountants also.

The person interviewed worked as the production manager for a small production company. Her position also included a certain amount of financial reporting and budgetary management in relation to a number of productions within the company. Tasks included preparing budgets for NZ on Air and proposals before the network, managing the day-to-day financial operations of productions within the company, ensuring crew invoices are paid and financial reporting of productions.

Joining the company straight out from completing a degree in Film and TV at an Auckland Polytechnic, she began as a receptionist – working on the front desk. Spending a number of years working her way up, in addition to production management, she is also the compile director for one of the regular shows of the company.

I just did basic sort of, check the mail, run the front desk, order stationery and stuff, but then I started doing other things. ... I just started doing more and more stuff. Taking on more jobs. Not like stealing them but doing them.

In relation to training, having done a course was not considered imperative to getting a job, but provided a good foundation skill set by which to enter into the industry.

...when you do a course, you have got all that grounding of all the stuff you know and if I had come and worked here and hadn't done it...I would have had to ask a thousand questions. At least I knew some stuff and I think the problem would have been that either everyone would have been too busy to tell me all the stuff or it would have taken up people's time explaining it to me.

There was little focus on financial reporting skills and basic accountancy within her course. It was also highlighted that there are certain procedural issues that are company specific that can only be learnt through on the job training. The majority of her financial reporting and basic accountancy skills were learnt on the job through observation and working closely with the company's business manager.

I knew the basics of Excel and didn't really know that much. A lot of it I have learnt on the job, heaps of it I have learnt on the job – most of it I would say, in terms of how a real budget works and the real cost of things. What things actually cost and all the things you have to think about as you are going along. You are putting a budget together and there are so many different things that you could easily forget about, like phone calls or... I think most of my budgeting and accounting, those sort of skills, I have mostly learnt on the job.

Her on-the-job training was obtained by having tasks assigned.

It was from being asked to do something and then doing it, but in the process asking questions about what I was doing – am I doing this right, is this correct, that sort of thing. I think that is probably a better way to learn, rather than someone leading you through every step of how to do something. Someone gives you the run down of what you need to do and you go and do it, but you get back to them every time you have a problem with it, and I think that is a better way to do it because you learn from your own mistakes in the process.

An overall knowledge of every aspect of production was considered invaluable.

Having a good technical knowledge in terms of all the processes, is really, really valuable. If you know...that is how you can see all the things that could go wrong and the best ways of doing things and it means...in production it is ideal to actually have an understanding of everyone else's job and how everything else works.

I think the technical is a really good grounding and it means that it makes your job easier and it means that no one else has to...you don't have to have 10 other people try and help you do your job for you.

Central to the job was tenacity and a passion for the work. Motivation and drive were also considered invaluable skills to have.

You have to have some sort of passion about it, you have to have some sort of drive for what you do. Even if it is shit and you are kind of hating it and it is all too much and you have got way too much work to do and stuff, you have to be able to put that aside and just get the job done, even if it means being here to 10.00pm. That sort of thing.

Personal traits and skills highlighted, many of which were not skills obtained in the education system, were:

Attention to detail

Lateral thinking

Ability to trouble shoot and problem solve

Deadline focused

Excellent inter-personal and communication skills

Training Solutions Suggested:

- In order to capitalise on the free-lancing nature of accountancy, short courses giving accountants an overview of television/film production and processes should be established. These courses could be tied to an organization such as SPADA and may help facilitate placements for accountants wishing to work in the screen production industry.

- *Financial management and reporting:* Generic courses in film and television should include curriculum that covers basic accountancy, budgetary and financial reporting skills.
- *Forward planning and organizational management:* Generic courses in film and television also need to focus on forward planning and organisational management strategies within their curriculum.

A 2.2 Costume Designer

In addition to obvious job-related skills such as sewing skills, the skills, personal qualities and other prerequisites for a costume designer that were highlighted were:

Ability to calculate quantities quickly

Good knowledge of fabrics

Have a car, own a cellphone.

Active listening skills, able to interpret instructions clearly.

A knowledge of process and procedure e.g. when it comes to taking clothes out on loan from stores.

Adaptability and flexibility

Low reaction to stress

Communication skills

The following quotes aptly illustrate the demands of the job and practicalities:

...this is an intensely practical industry, it is always about problem solving quickly...You have to come up with a solution extremely quickly and extremely competently and if your wonderful concept takes too long to execute, forget it. I think the colleges perhaps need to rein this in more quickly if possible, that concept is 10% and execution and provision of the finished thing is 90%. A costume designer's job is probably, maximum 20% design and the rest is getting it all together.

As far as the trade skills, they are good and they are adequate, sewing skills, fabric technology skills, being able to do drawing, those sort of things are all very good, but what they can't offer and what they try and get a taste for their students is inviting industry professionals, such as myself, to give them an iota of an idea of set procedures and set etiquette, which is all unwritten...But certainly sometimes you are surprised at certain holes in their knowledge to do with fabric and to me, fabric is just so important...our whole industry, the costume side, revolves around fabric knowledge and they need to get that together.

If you are...say for a TV commercial, you have got to know how to work the shops, if you are taking stuff out on appro, there is all procedures that different shops do and it is very much talking to people and getting them to let you take stuff out on stock and there is certain procedures that you have to do.

Training Solutions Suggested:

- Industry practitioners who have current active industry involvement, to give guest lectures in courses, especially to convey the unwritten industry etiquette and practice.
- Work experience is vital and courses should have a significant on-the-job component. The following quote highlights this for the job of a costume designer, but was suggested to be applicable to several other jobs in the screen production industry as well:

...a three month internship and someone has done two years of technical training, it should actually be the other way around, if they want a job in the film industry, they should have two years of internship and three months of technical skills training.

APPENDIX 3

Screen Production Industry On-the-Job Training Pilot Scheme

Background

Screen Production is a project-driven industry. Continuity of work-based training with a single employer is thus difficult. Yet, the nature of the screen production industry is such that skills acquisition is mainly (and arguably best) through on-the-job mentoring, 'looking and listening' and 'learning by doing'. This paper outlines elements of a proposal to innovatively meet the demands of on-the-job training in the industry.

It is proposed that a short duration (duration yet to be determined) pilot scheme is run in the first instance, with a small number of participants (trainers and trainees).

Trainers:

- The Training Model – For specified departments in the industry e.g. gaffers, producers; three or four mentors collaborate to form a 'training cluster'. They together select a small number of trainees (e.g. through interviewing candidates) who will move between projects undertaken by the cluster.
- Additional considerations
 - Co-ordination - The initial small size of the cluster will enable a co-ordination process of managing the trainee's movements between projects to be devised easily among them. When the scheme is extended, however, the co-ordination aspect will have to be more centrally managed.
 - Funding - Possible need for incentive payments for trainers to take on this extra training responsibility; there are also other costs e.g. possible health and safety costs that they will incur that must be borne in mind.

Trainees:

Considerations:

- The need for a 'living wage' during the training period. This could perhaps be satisfying eligibility requirements for a student allowance.
- Some form of formal recognition of training and experience gained. Since the industry has no ITO and no comprehensive set of NZQA recognised unit standards, this formalisation of the skills and experience acquired can take the form of a Certificate of Achievement (signed by the Cluster members) in terms of the particular Job Specification Criteria.

Anne de Bruin

25th July 2003

Following discussion at a meeting with Margaret Slater, Sally Meiklejohn and Eva McLaren on 24/07/03. (Circulated and approved by meeting participants).

APPENDIX 4

Letter to Hon. Jim Anderton, prepared by some members of the Auckland Regional Film Summit, Skills Action Team.

25 August 2003

Hon. Jim Anderton
Parliament
Wellington

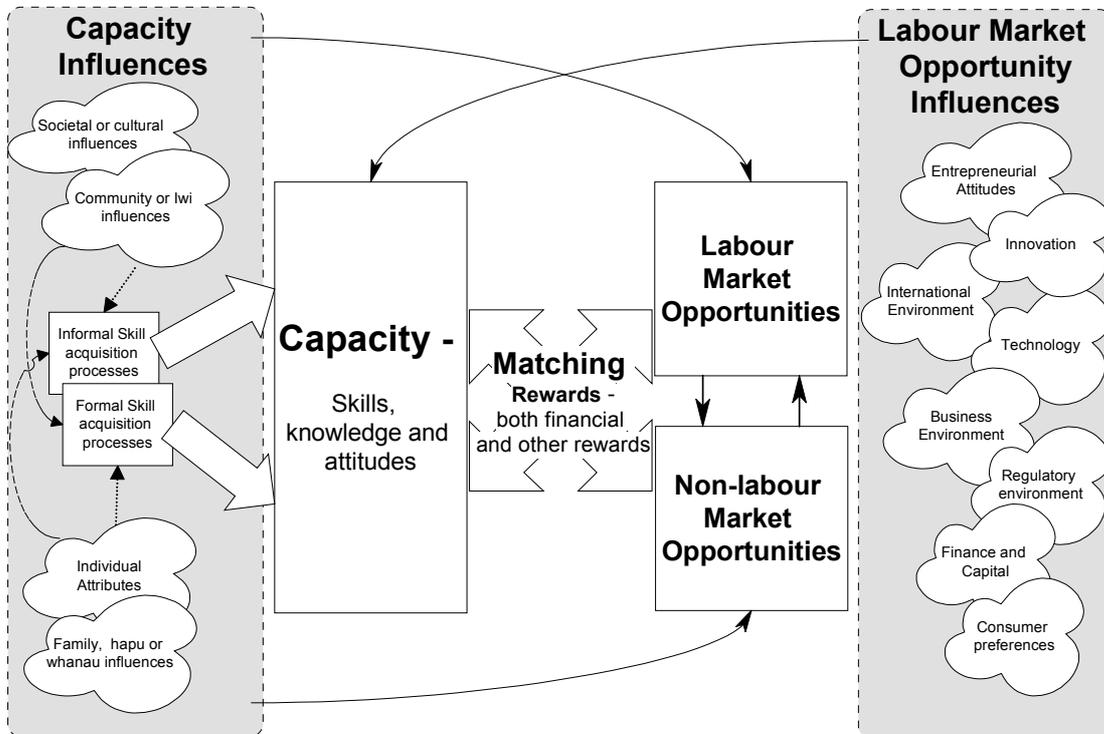
With reference to the 12.5 per cent production expenditure grant for large budget film and television productions, as an industry group, we strongly suggest that the following be taken into consideration when setting criteria to receive the grant:

- A minimum requirement of New Zealand crew/technicians in the total production crew
- A minimum quota of NZ trainee crew be applied across all departments
- Overseas Production Companies must use a local production company/Producer as the service provider

Our industry infrastructure is small, tight and growing. We are viewed with high regard for our skill levels in the international market place. If 'on the job' training for New Zealanders is not implemented in these productions, however, we run the risk of not being able to build the human capacity that is so necessary for growth and sustainability of our screen production industry in the future.

APPENDIX 5

Elements of the Human Capability Framework



Source: Department of Labour (1999) Human Capability: A Framework for Analysis, p.19.