

# ANNUAL REPORT

QUEBEC FILM AND  
TELEVISION COUNCIL

15  
YEARS

MONTREAL

20  
20  
-  
20  
21

# Canada



The Honourable  
**STEVEN  
GUILBEAULT**

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The Honourable  
**MÉLANIE  
JOLY**

A handwritten signature in white ink on a black background.

It is no secret to anyone that the past few months have been particularly difficult—and the film and television sector has not been spared. Many productions were abruptly shut down, while others never even saw the light of day. This has had profound consequences for the industry and for our economy. It is in this context that the Bureau du cinéma et de la télévision du Québec has continued carrying out its mission.

More than ever, our government is committed to helping creative industries, as well as the organizations that work with them, as it is only together that we will be able to weather the storm. This is why we are proud to salute the work of the BCTQ. We are certain that its efforts over the past year will lead to a promising future for film and television in this country, and contribute to the vitality of our economy.

As Minister of Canadian Heritage and as Minister of Economic Development and Official Languages, we would like to thank everyone who contributed to the production of this report.

# MESSAGE DES MINISTRES

## AU CŒUR DE L'INDUSTRIE DEPUIS 15 ANS

Le rayonnement international du Québec dans l'industrie audiovisuelle et cinématographique, incluant l'animation et les effets visuels, est le résultat du travail acharné et remarquable de tous les acteurs du milieu, qui, jour après jour, mettent en lumière un savoir-faire dont nous sommes fiers.

Derrière eux, il y a les efforts déployés par le Bureau du cinéma et de la télévision du Québec (BCTQ), qui mobilise le secteur des services de production depuis maintenant quinze ans afin d'en assurer la vitalité économique. En s'appuyant entre autres sur l'expertise de ses membres et sur la qualité de nos infrastructures, le travail du BCTQ participe à l'attraction d'investissements étrangers. Des retombées importantes en découlent pour la métropole et pour le Québec.

Le gouvernement du Québec est fier de soutenir la mission du BCTQ. Nous saluons l'engagement et la détermination de ses membres à maintenir le développement et la compétitivité de l'industrie audiovisuelle et cinématographique au Québec. En ces temps plus difficiles, la collaboration de tous est essentielle. C'est pourquoi nous réitérons notre appui pour que les entreprises et le talent québécois puissent continuer de se démarquer, et ce, tant à l'échelle locale et nationale qu'internationale.



**CHANTAL ROULEAU**

Ministre déléguée  
aux Transports

Ministre responsable  
de la Métropole et de la  
région de Montréal



**NATHALIE ROY**

Ministre de la Culture  
et des Communications



**ÉRIC GIRARD**

Ministre des Finances  
Ministre de l'Économie  
et de l'Innovation

# MESSAGE FROM THE MAYOR OF MONTREAL

Montréal 



Communauté métropolitaine  
de Montréal

## VALÉRIE PLANTE

Mayor of Montreal and  
Chair of the Communauté  
Métropolitaine de Montréal



Film and television have played a more important role than ever in our lives over the past year, guiding us during the pandemic and meeting our needs for entertainment.

Behind the scenes, people have worked twice as hard to maintain the dynamism of this industry that enlivens Montreal daily and contributes to its status as a cultural city.

As the Mayor of Montreal and Chair of the Communauté Métropolitaine de Montréal, I applaud the commitment of the team at the Quebec Film and Television Council, who held the fort and allowed this industry's exponential growth to continue.

With the "Rolling Green" and "Release your Creativity" programs, and their inclusion of diversity – which, for the first time, provides that trans and non-binary people be adequately represented – the QFTC is confirming its position as a leader with respect to the green transition, solidarity, equity and inclusion. These commitments are also consistent with the objectives of the Montreal 2030 strategic plan.

A major gateway for local and foreign projects, the QFTC has contributed to the cultural visibility and economic vitality of Montreal for 15 years. The City of Montreal will continue to support this ecosystem, a source of pride for us.

I would like to thank each and every artisan who has shaped Montreal's character – innovative, daring, creative, richly diverse and open to the world.

# MESSAGE FROM THE MAYOR OF QUEBEC CITY



**RÉGIS LABEAUME**

Mayor of Quebec City



In its 15 years of existence, the Quebec Film and Television Council (QFTC) has succeeded in having our city recognized as an exceptional location for local and international filming.

Beyond its architectural beauty and European charm, Quebec City has built a solid reputation as a thriving haven for talented artists and artisans who love a challenge. Even the boldest ideas don't faze us!

For sure, this past year has been difficult for the industry. I commend the QFTC for its hard work in ensuring the progress of important projects such as regional film shoots.

As in any good film or TV series script, a triggering incident breathes new life into the story. So the post-pandemic period should be a bustling time!

Quebec City will be able to count on the QFTC's expertise to develop its vision for film and TV production. Our goal is to better support this industry that provides economic benefits and unparalleled visibility for our city.

Happy 15th anniversary to the QFTC! Let's all hope that, in the months to come, we hear the well-known refrain "3-2-1-Action" throughout the province.

# MESSAGE FROM THE SODEC

SODEC  
Québec 

LOUISE LANTAGNE

CEO

*Louise Lantagne*



After 2020, the year of the pandemic, the Société de développement des entreprises culturelles (SODEC) would like to commend the remarkable work of the Quebec Film and Television Council (QFTC), which used all its ingenuity and adapted quickly to continue its mandate of attracting foreign productions while working virtually. Hats off to CEO Pierre Moreau and his entire team! The results of this work are already measurable: 2021 is shaping up to be a record year for film productions in Quebec.

A noteworthy accomplishment that the QFTC pulled off in a difficult context while maintaining its commitment to sustainable development by implementing the Rolling Green initiative. And let's not forget the updating of the photo library, containing over 8,000 film locations, a splendid calling card for foreign and local producers, as well as the success of the first fundraising gala, paying tribute to Roland Emmerich, which was held online. Congratulations and thanks to everyone!

# MESSAGE FROM THE CHAIR OF THE BOARD OF DIRECTORS

After a year filled with challenges and changes, the Quebec Film and Television Council, as well as the entire audiovisual industry, implemented the actions required to quickly adapt so that they could come out of this global health crisis better and stronger than ever! Thanks to the support of a diverse and dynamic community, involved and supportive members, a dedicated board of directors, public and private partners who demonstrated unwavering trust and a passionate and committed permanent team, we can confidently affirm that the QFTC met the objectives it had set for its twofold mandate over the past year. As you will see in this annual report, through the projects undertaken by the Audiovisual Cluster secretariat, baseline studies brought together the different stakeholders around common, promising and strategic topics, while helping to enhance Quebec's reputation abroad; major projects that will undoubtedly strengthen the foundations of our sector.

The QFTC also played the role of promoter by positioning itself as a benchmark, an industry pro on anything related to production, filming, visual effects and animation, not to mention the competitive aspects of our industry, such as tax incentives. It was also a driver of business development in anticipation of the resumption of business in our ecosystem.

With competition increasingly fierce around the world, the Council will relentlessly pursue its efforts to constantly keep Quebec at the forefront and on top of the list as an essential player in the audiovisual sector. As a community, it is our duty to keep our conversation and collaboration alive in order to preserve this strength that unites us and allows us to work together towards a broad perspective enabling us to attain our goals together.

With this in mind, I would especially like to acknowledge the outstanding work that Pierre Moreau has done over these last six years as the CEO of the QFTC. Through his leadership, passion and contagious motivation, he managed to mobilize an entire industry to test its limits, innovate and question the status quo. He guided the QFTC with expertise and great skill. Pierre isn't leaving us; he's leaving behind innovative ideas and formative projects that have paved the way for us for 15 years and towards our destiny!

Congratulations, and thanks again, Pierre!



**ÉMILIE DUSSAULT**  
Chair of the  
Board of Directors

# MESSAGE FROM THE CEO

Dear Sir or Madam,

Over the last six years, I have had the privilege of directing the Quebec Film and Television Council. This position gave me the unique opportunity to interact with all the actors of this vibrant community while being responsible for moving a shared vision forward so that a thriving audiovisual industry, respectful of each of its components, develops here. The daily challenge of unifying stakeholders means implementing inclusive, well-articulated and efficient action plans; a vision that rallies people around a shared passion fostering our sense of belonging to this community that we are transforming together. I will be stepping down from the position of CEO on September 1st, as the QFTC enters its 15<sup>th</sup> year of existence, and I will do so with a sense of accomplishment. I am proud of having contributed, along with the members of the Governance Committee and the QFTC team, to establishing an ambitious development agenda and to initiating fundamental discussions on forward-looking topics, always with sensitivity and passion.

2020 will be remembered as an atypical year, I hope. The pandemic turned our lives and practices upside down and forced us into awareness, which was beneficial in some respects, but the recovery promises to be strong and the outlook is encouraging! The annual report that we present to you this year is also atypical. The tremendous efforts made throughout the

year by the QFTC position it as a dynamic and innovative organization. Through its reinvented trade missions, its sustainable industry project, its discussions on the development of artificial intelligence and the completion of a study charting a course to sustainable growth that could promote Quebec's energy assets, the Council has kept its mission and the concerns of its members at the forefront. I invite you to have a look at the surprising content of our 2020 annual report: a journey that was tumultuous at times, but a clear and inspiring path.

Lastly, I would like to thank our political and institutional partners for their invaluable trust, the members of the business community for their support and their involvement on our committees, our Board of Directors for its dynamism and sound advice, as well as the fantastic team at the QFTC, whom I will miss, of course, but whom I know will continue to be a source of enlightened inspiration for the person who will, in turn, have the privilege of having them as their colleagues.

Sincerely,



**PIERRE MOREAU**  
CEO

A handwritten signature in black ink, appearing to be 'P. Moreau', written on a white background.

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# THE QFTC'S MISSION

The Quebec Film and Television Council (QFTC) is a non-profit organization whose mission is to contribute to the **development and competitiveness of Quebec as a world-class multi-screen production hub.**

It generates investments in Quebec by leveraging competitive tax incentive programs, the expertise of industry members, the province's geographical and architectural diversity, the quality of its infrastructure and the industry's ability to export its products to foreign markets.

Today, our goal focuses on two main areas:

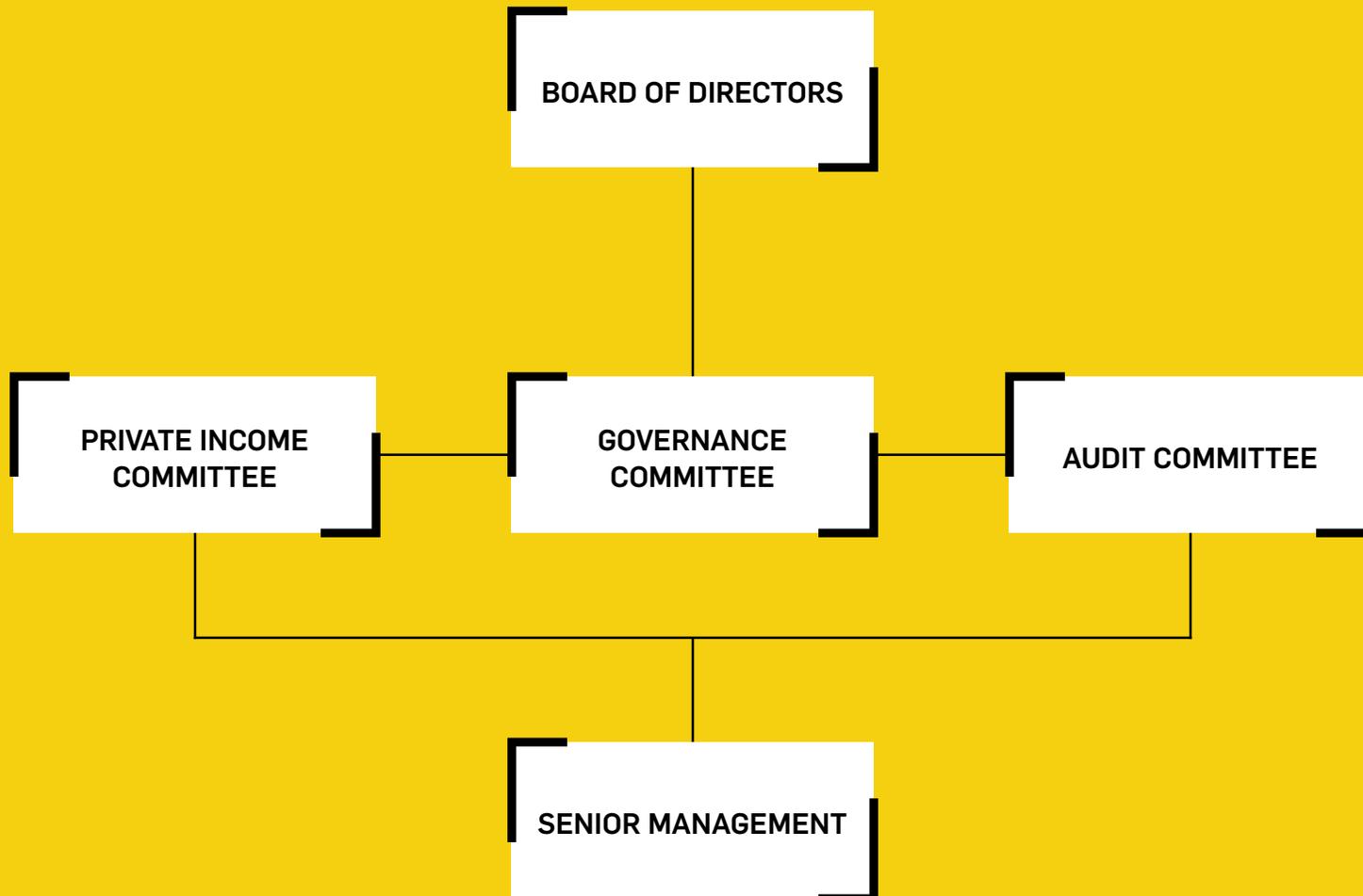
**Sectoral development (Cluster)** - the Council aims to be a place for dialogue and collaboration where concrete actions are formulated to support market growth. From time to time, it heads major projects involving studies or consultations that allow it to measure, guide and better document the industry development of the sector.

**Production services (Promotion)** - They highlight the advantages of filming in Quebec: unique architectural diversity, world-class infrastructure, a high-end professional environment and, lastly, one of the world's best visual effects ecosystems.

Finally, the QFTC acts as a representative and strategic advisor when dealing with government agencies.

The members of the QFTC, their representatives on the Board of Directors and the Council's public and private partners all contribute to enhancing the visibility of the Quebec audiovisual sector, both here and beyond our borders.

# ORGANIZATIONAL CHART OF THE QFTC



# BOARD OF DIRECTORS



**PHILIPPE MONTEL**  
Productions Belzébuth



**ÉMILIE DUSSAULT**  
Chair  
Technicolor



**GILLES CHARLAND**  
AQTIS,  
Section locale 514 Aiest



**MARIE-CLAUDE POULIN**  
MCP Productions



**NICOLAS SAVOIE**  
Vice Chair  
Difuze



**LOUISE LANTAGNE**  
Société de développement  
des entreprises culturelles (SODEC)



**FRANÇOIS SANSREGRET**  
Tonic DNA



**ALEXANDRE LATURAZE**  
Treasurer  
Demers Beaulne



**ANDREW LAPIERRE**  
Grandé Studios



**YOHANN MAUBRUN**  
Observateur  
Quebec City – Major Events Office



**DEAN CHENOY**  
Secretary  
Miller Thomson

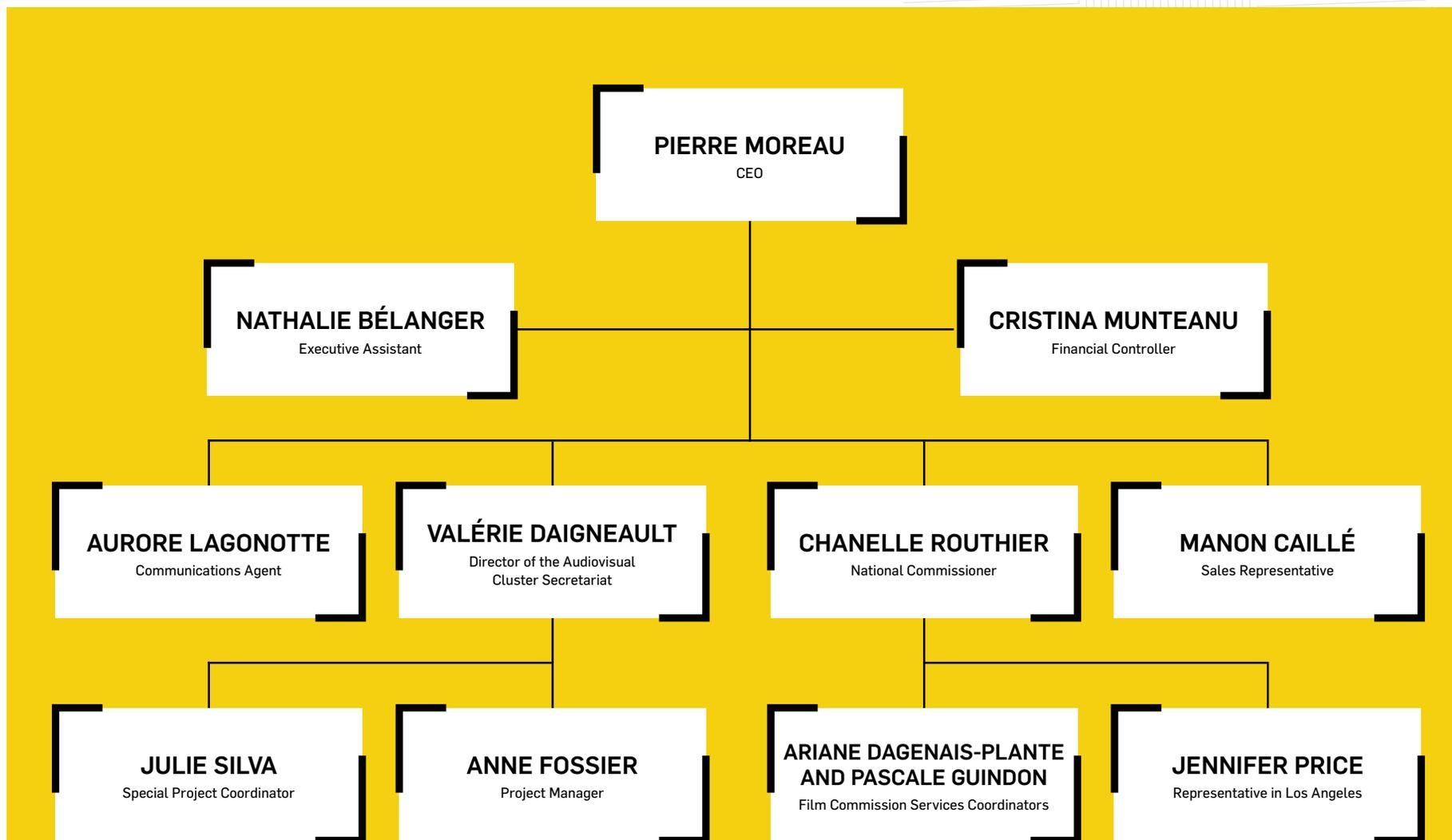


**CHRISTIAN LEMAY**  
AQTIS,  
Section locale 514 Aiest



**THOMAS RAMOISY**  
Observateur  
City of Montreal – Montreal Film  
and TV Commission (MFTC)

# QFTC TEAM



# THE SECTOR SUPPORTS MORE THAN 63,000 JOBS IN QUEBEC

## QUEBEC TELEVISION PRODUCTION

12,346 DIRECT

7,149 INDIRECT

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19,495

## QUEBEC FILM PRODUCTION

2,612 DIRECT

1,739 INDIRECT

---

4,351

## FOREIGN PRODUCTION AND PRODUCTION SERVICES

20,344 DIRECT

12,780 INDIRECT

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33,124

## INTERNAL PRODUCTION

3,184 DIRECT

3,275 INDIRECT

---

6,459

### Source

Profile of the Audiovisual Industry in Quebec. 2021 Edition, Institut de la statistique du Québec, Observatoire de la culture et des communications du Québec

### Note

The parameters used to evaluate employment, work income and gross domestic product (GDP) have changed since 2019-2020. The results published here should not be compared to the results published in the previous editions of the Profile of the Audiovisual Industry in Quebec.

### Data sources

The estimates are based on the following data sources, according to the methodology described in Profile 2020: Economic Report on the Screen-based Media Production Industry in Canada.

Société de développement des entreprises culturelles, data from the Quebec Tax Credit Program.

Canadian Radio-television and Telecommunications Commission: Statistical and Financial Summaries of Discretionary and On-Demand Services, 2015-2019.

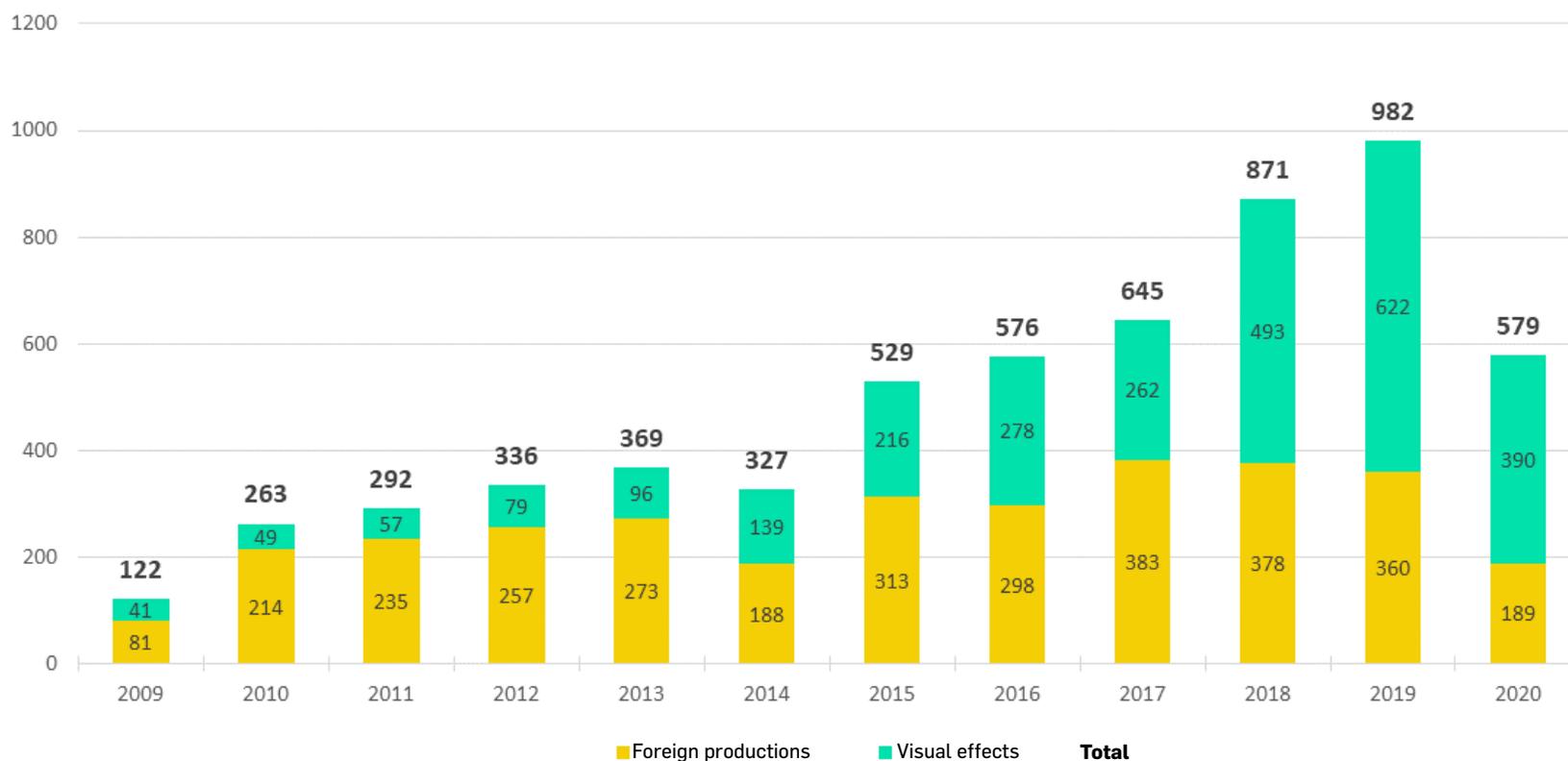
Statistical summaries for conventional television, 2015-2019.

### Photo credit

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# DIRECT ECONOMIC BENEFITS

Direct economic benefits in Quebec  
Foreign production and visual effects  
industries from 2009 to 2020  
*(in millions of Canadian dollars)*



Sources: QFTC, SODEC, Pwc

# UPDATE ON THE COVID-19 SITUATION

In 2020-2021, our priority was to support the audiovisual community by ensuring, for our members, ongoing monitoring regarding priority issues and by circulating relevant information on business resumption activities in the industry.

The QFTC's first action was to identify the concerns of industry stakeholders in order to formulate key messages to relay to institutions putting support measures in place.

In addition, the QFTC made sure that it would be included in the Canada-wide COVID-19 task force (Production Industry Task Force) led by the CMPA and the CMF to contribute to representation and information efforts.

Many actions and representations were carried out for this purpose:

- Representation before government agencies to ensure that tax credits would remain stable;
- Compilation of cancelled or deferred foreign productions;
- Collaboration with unions and the recovery committee, spearheaded by the Ministère de la Culture et des Communications to facilitate the quick implementation of a health measures guide enabling the resumption of filming;
- Implementation of competitive monitoring and presentation to key stakeholders of options for accelerating the implementation of health measures (e.g. disinfection robots, list of accredited testing companies, etc.);
- Development of three surveys to be conducted among companies in the live-action, visual effects and animation sectors to measure the impact of the pandemic on revenues and jobs in order to guide government authorities with respect to assistance needs;
- Consultation among visual effects and animation studios to adequately evaluate remote work issues: content security, workforce isolation and retention of temporary foreign workers, among other things;
- Communication to members of all information related to the measures taken by the public health departments.

# HOSTING AND PROMOTIONAL ACTIVITIES



# FOREIGN PRODUCTIONS

With 13 productions, 2020 was significantly marked by the impact of the pandemic, resulting in an abrupt interruption of filming for several months. Despite two quarters of a near-total stoppage, the volume of direct economic benefits reached **\$189M**, compared to the \$360M recorded in 2019.

The closing of the borders also delayed the resumption of several productions. Despite the situation, the results achieved are proof of continued interest in Quebec on the part of foreign producers. It's worth noting that production volume has seen continued growth globally.

Throughout 2020, the QFTC made sure that it was available for its members to support them and provide them with accurate, up-to-date information. These actions allowed them to adjust their production activities according to the health measures in effect and to defend their interests before the different levels of government.

Our business sector has changed tremendously and a **strong recovery is expected for 2021.**

**\$189M**

SPENT IN QUEBEC  
IN THE SPACE OF  
6 MONTHS



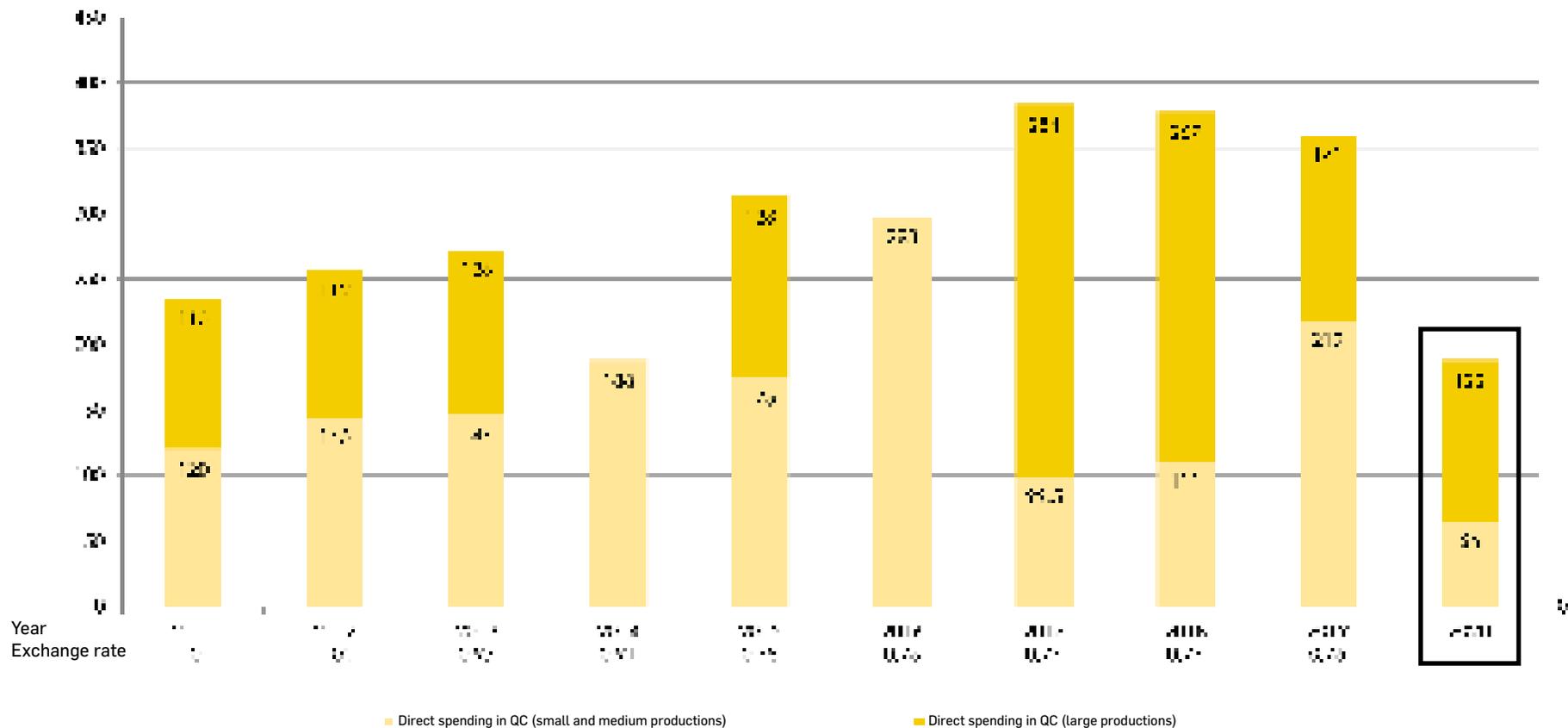
**13**

FILM SHOTS

**2,930**

JOBS CREATED  
OR MAINTAINED

# FOREIGN PRODUCTION VOLUME



# PRODUCTIONS SHOT IN QUEBEC

	PRODUCTIONS	PRODUCTION COMPANY	DIRECTOR(S)	COUNTRY
1	BLOOD & TREASURE SAISON 2	CBS TV STUDIOS	STEVE BOYUM   GUY NORMAN BEE HOLLY DALE   TAWNIA MCKIERNAN	USA
2	CHRISTMAS EVER AFTER	VROOM PRODUCTIONS	PAT KIELY	USA
3	FATMAN	PANASPER FILMS	ESHOM NELMS   IAN NELMS	USA
4	SWEPT UP BY CHRISTMAS	HALLMARK	PHILIPPE GAGNON	USA
5	HOME ALONE	DISNEY +	DAN MAZER	USA
6	THE WOLF AND THE LION	TRANSFILM   GALATÉE FILMS	GILLES DE MAISTRE	USA
7	MOONFALL	CENTROPOLIS	ROLAND EMMERICH	USA
8	PIECES OF A WOMAN	BRON STUDIOS LITTLE LAMB PRODUCTIONS CREATIVE WEALTH MEDIA	KORNÉL MUNDRUCZÓ	USA / CAN
9	THE BOLD TYPE SAISON 4 - 6EP.	UTP	VICTOR NELLI JR.   ANNA MASTRO JAMIE TRAVIS	USA
10	THE BOLD TYPE SAISON 5	UTP	VICTOR NELLI JR.   ANNA MASTRO JAMIE TRAVIS	USA
11	MISANTHROPE	FILMNATION ENTERTAINMENT	DAMIÁN SZIFRON	USA
12	THE MOODYS	CBS TV STUDIOS	BOB FISHER   ROB GREENBERG   JAY KARAS   JACOB TIERNEY	USA
13	THE REPUBLIC OF SARAH	CBS	ERICA DUNTON   KAT CANDLER	UK



HOME ALONE (DISNEY+)



PIECES OF A WOMAN (BRON STUDIOS, LITTLE LAMB PRODUCTIONS, CREATIVE WEALTH MEDIA)



THE MOODYS (CBS TV STUDIOS)

# SERVICES FOR PRODUCERS

In addition to promoting Quebec in the international markets of the audiovisual industry, the QFTC is the one-stop service provider for foreign producers interested in filming in the province.

In its role as facilitator, the Council intervenes during the different project steps. Whether for a digital photo album showing various film locations, a scouting tour or a permit problem, the QFTC does everything it can to promptly meet producers' needs.

Despite the context of the pandemic, the QFTC maintained its relations with foreign producers by providing them with logistical support throughout this challenging period.

A few examples of support services provided in 2020:

- Providing logistics support for foreign productions during the resumption of filming in the context of COVID-19.
- Collaborating with relevant regional offices to identify alternative shooting locations when the original one planned for a scene was no longer available due to the pandemic.
- Facilitating conversations between a production and a municipality so that the latter would allow the use of certain shooting locations.
- Getting answers from the CNESST for questions specific to a film shoot.
- Etc.



Screenshot – Journal de Montréal, June 1, 2020

# VIRTUAL REALITY FAM TOURS

Because it wasn't possible to organize scouting and fam tours in the traditional way due to the pandemic, the QFTC took the initiative of designing a new familiarization tour format that is innovative, interactive and completely virtual.

The idea behind the activity remains the same: target foreign producers likely to consider Quebec as a filming location for their audiovisual projects by inviting them to discover everything Quebec has to offer.

We created a virtual reality production to show them the advantages and specific features of Quebec's audiovisual industry. Virtual reality headsets bearing the QFTC logo were delivered to each of the producers invited, thanks to the support of our funders and private partners. According to the producers who took part in these tours, the QFTC brand and the audiovisual services of our industry partners had a huge impact. The targeted producers could watch the content of the production as many times as they wanted and share it with their production teams.

This production was presented as part of virtual tours organized by the Council, in which the invited producers could meet up, discuss their upcoming projects and meet Quebec companies while enjoying Montreal food specialties delivered to their door; a very special extra touch that the producers really appreciated.

During these reinvented familiarization tours, the advantages of Quebec's audiovisual industry were presented to participating U.S. studios.

A promotional brochure was also created to accompany the VR presentation, containing, among other things, the list of participants and their respective contact information, as well as all the audiovisual services available in the province of Quebec.



# VIRTUAL REALITY FAM TOURS

**(CONT.)**

In January 2021, the QFTC organized a double familiarization tour to mark the launch of this new format.

The nine U.S. studios/producers that took part were:

- A & E Studios
- A24
- Apple TV
- CBS Television Studios
- John Wells Productions
- Marvel Studios
- Skydance
- Universal 1440 Entertainment
- Universal Content Productions

## DIRECT ECONOMIC BENEFITS RELATED TO THE ORGANIZATION OF THE VIRTUAL FAM TOURS

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### CONFIRMED

- Disappointment Blvd (film), A24
- End is Nye (serie), UCP
- Ghosts (serie), Lionsgate Television & CBS Television Studios

**TOTAL: CAD 130 MILLION**

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### STRONG POTENTIAL

- Film for Spyglass Media
- 2 films for MGM & STX

**TOTAL: CAD 80 MILLION**

# INTERNATIONAL ACTIVITIES

Every year, the QFTC takes part in national and international markets and conferences. Through these representational activities, the QFTC promotes the province of Quebec as a multi-screen production hub to producers it meets on site and develops business relations with the most influential leaders of the international film and television industry. During these major events, the QFTC promotes all the sectors of expertise available in

Quebec, highlights the talent of the province's professionals and artisans, facilitates business opportunities for its partners and members and has an opportunity to gauge industry trends.

Because of COVID-19, all our representational activities for the year were conducted online:

**JUNE  
2020**

MIFA  
Annecy, France

**OCTOBER  
2020**

MIPCOM  
Cannes, France

**DÉCEMBER  
2020**

FOCUS Digital UK  
Londres, UK

**MARCH 2021**

1. Berlinale/European Film Market  
Berlin, Allemagne
2. PGA Awards  
Los Angeles, USA

**SEPTEMBER  
2020**

Toronto International  
Film Festival (TIFF)  
Toronto, Canada

**NOVEMBER  
2020**

American Film Market (AFM)  
Los Angeles, USA

**FEBRUARY  
2021**

Prime Time Ottawa  
Ottawa, Canada

# VISUAL EFFECTS AND POSTPRODUCTION MISSION

To replace the mission to Los Angeles planned for March 16–19, 2020, which was postponed due to COVID-19, the QFTC organized a **virtual economic mission** that took place from February 2–5, 2021.

In collaboration with Investissement Québec International and the Quebec company B2B2GO, the QFTC made available to the eight participating Quebec companies and U.S. clients a customized platform displaying the QFTC logo that facilitates interaction and appointment booking between buyers and sellers.

The Quebec companies that participated were:

- AA Studios,
- Cinesite,
- Difuze,
- Hybride,
- Kaibou,
- MELS VFX & postproduction,
- Rodeo FX,
- Studios St-Antoine.

More than 70 guests representing some thirty studios from the U.S. and independent producers took part in the round tables organized by the QFTC.



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THE NORTH WATER ©BBC ALL RIGHTS RESERVED  
(COURTESY OF CINESITE)



WANDA VISION ©MARVEL STUDIOS  
(COURTESY OF RODEO FX)

# CANADIAN FILM AND TELEVISION COMMISSIONS (CFTC) NETWORK

The QFTC spearheaded the creation of the network and manages its coordination.

Meetings of the Canadian Film and Television Commissions Network were more numerous in 2020-2021 in the context of COVID-19: **9 meetings were organized.**

Through these online meetings, the network greatly facilitates the exchange and sharing of news among all the provinces of Canada through all levels of representation. More than 30 film commissions participate in each of the meetings.

In addition, the Council is a member of the Film Commission Advisory Committee of the Association of Provincial and Territorial Funding Agencies (APTFA).



# QUEBEC REGIONAL OFFICES COMMITTEE

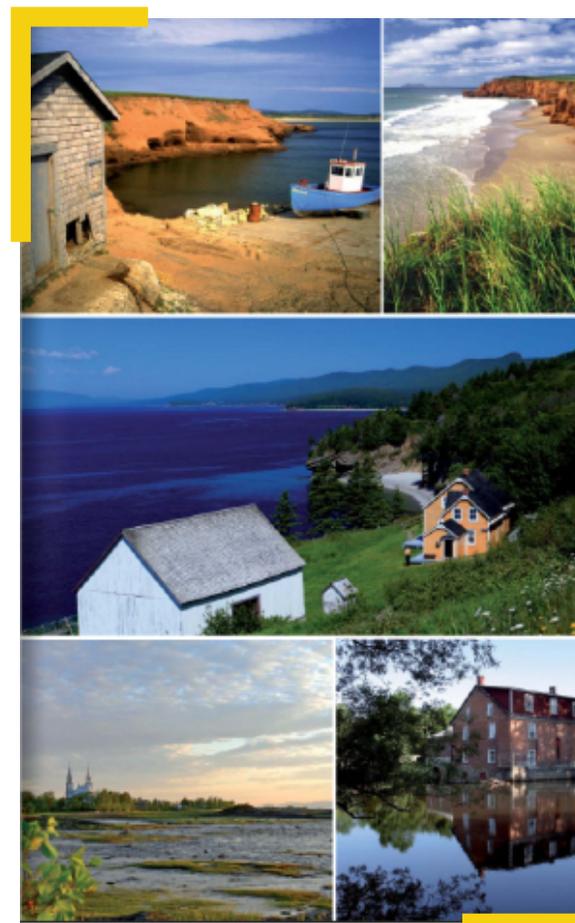
This year, the QFTC established a permanent committee of the Regional Film Offices of the province of Quebec in order to develop dialogue and exchange among the various regions.

The main goals of this project are:

- To establish better communication among the offices;
- To foster proactive collaboration among stakeholders;
- To work together for the advancement of regional projects and to solve specific problems related to audiovisual production in the different regions of the province.
- To encourage resource pooling and knowledge of the various regional proposals.
- To ensure the competitiveness of the audiovisual services available in the regions of Quebec.

The launch of the Quebec Regional Offices Committee took place on September 10, 2020.

Five meetings have taken place since then.



# NEW NATIONAL PHOTO LIBRARY

The photo library is an essential tool for producers interested in filming in the province of Quebec. It is a collection of more than 8,000 film locations and it allows us to create some one hundred photo albums annually. These albums are presented to foreign producers to attract film productions and generate economic benefits.

To meet the North American standards of the film and television industry and to present competitive services to foreign producers, the QFTC conducted a complete overhaul of its national photo library.

Throughout 2020, the Council worked on transferring the entire database from its former platform. The new photo library was presented to the film and television offices of Quebec and to film location directors. Each of these groups received appropriate training in order to foster collaboration.

The QFTC would especially like to thank the SODEC, the Ministère de l'Économie et de l'Innovation (MEI) and Canada Economic Development (CED) for their financial contribution to this project.

The bilingual version of this new tool was launched in October 2020.

**87**  
NUMBER OF  
ALBUMS CREATED  
IN 2020

**8,112**  
TOTAL NUMBER OF  
FILM LOCATIONS  
IMPORTED

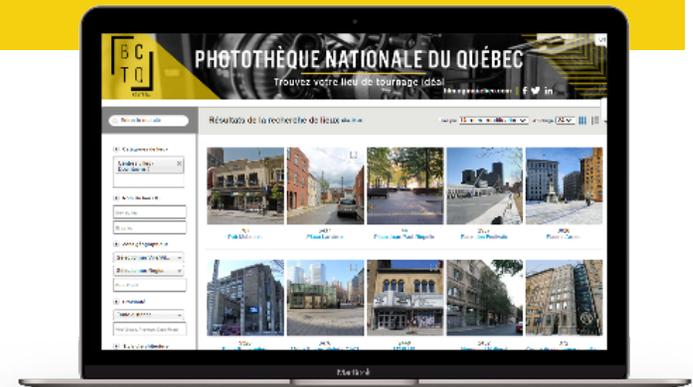
**BETWEEN APRIL 1, 2020 AND MARCH 31, 2021:**

--

**426,093 PAGE VIEWS**

**5,719 UNIQUE USERS**

- 39% from the U.S.
- 42% from Canada
- 19% divided among Europe, South America, Australia, India and elsewhere!



# CLUSTER ACTIVITIES



# INDUSTRY REPRESENTATION

## PROJECT HOURS

As shown in the following pages, in 2020-2021, the QFTC continued its Cluster work through **six projects** that helped **mobilize** companies and other stakeholders, implement projects and ensure **international recognition**.

The interactions generated by the cluster's momentum helped create complementary relationships and connections necessary for the growth and competitiveness of the sector in world markets.

More frequent meetings were held during the pandemic in order to provide close support to our members and closely monitor the situation as it evolved, as well as its impact on the industry.

APART FROM ITS PRIVATE INCOME, THE INDUSTRY'S SUPPORT FOR THE QFTC IN 2020-2021 WAS MANIFESTED AS FOLLOWS:

**759 (+18%)**

NUMBER OF HOURS INVESTED BY THE INDUSTRY

**124**

NUMBER OF INDIVIDUALS PARTICIPATING

**67**

NUMBER OF BUSINESSES  
OR ORGANIZATIONS REPRESENTED

# INSTITUTIONAL MEETINGS

As the representative of Quebec's audiovisual industry, the QFTC meets with many parties throughout the year to advance the interests of its members before the different government levels and institutions.

In 2020-2021, the QFTC met with:

## FEDERAL LEVEL

- Innovation, Science and Economic Development Canada | ISDE
- Employment and Social Development Canada
- Immigration, Refugees and Citizenship Canada | IRCC
- Canadian Heritage
- Telefilm Canada
- Radio-Canada/CBC
- Canada Media Fund | CMF

## PROVINCIAL LEVEL

- Office of the Premier
- Ministère des Affaires municipales et de l'Occupation du territoire | MAMOT
- Ministère de la Culture et des Communications | MCC
- Ministère de l'Économie et de l'Innovation | MEI
- Ministère de l'Éducation et de l'Enseignement supérieur du Québec | MEES
- Ministère des Finances du Québec
- Ministère de l'Immigration, de la Francisation et de l'Intégration | MIFI
- Ministère des Relations Internationales et de la Francophonie | MRIF
- Ministère du Travail, de l'Emploi et de la Solidarité Sociale | MTESS
- Secrétariat à la région métropolitaine | SRM
- Conseil Emploi Métropole | CEM
- Investissement Québec International
- Société de développement des entreprises culturelles | SODEC
- Quebec Government Office in Los Angeles
- Observatoire de la culture et des communications du Québec | OCCQ

## MUNICIPAL LEVEL

- Chamber of Commerce of Metropolitan Montreal | CCMM
- Communauté métropolitaine de Montréal | CMM
- City of Montreal
  - Quebec Film and Television Council | QFTC
  - Bureau des relations internationales
  - Mayor's Office
  - Service de la Culture
  - Service du développement économique
- Quebec City
  - Major Events Office
  - Economic Development Department
  - Table de concertation de l'industrie du Cinéma et de la Télévision de la Capitale-National

# ECOSYSTEM MEETINGS

The QFTC also plays the role of representative for its members before other components of the industry, namely, associations, schools and professional services.

In 2020–2021, the QFTC met with:

## ASSOCIATIONS

- Alliance of Canadian Cinema, Television and Radio Artists | ACTRA
- Alliance Québec Animation | AQA
- Association québécoise de la production médiatique | AQPM
- Association québécoise des techniciens de l'image et du son,
- IATSE Local 514 | AQTIS
- Canadian Film Center | CFC
- Directors Guild of Canada – Quebec District Council | DGCQDC
- Film Laurentides
- Fonds de solidarité FTQ
- Fonds d'Investissement de la culture et des communications | FICC
- Grand Costumier
- Guilde du jeu vidéo du Québec
- Québec Cinéma
- Regroupement des producteurs indépendants de cinéma du Québec
- Union des artistes | UDA
- Xn Québec – Association des producteurs d'expériences numériques du Québec

## SCHOOLS

- Cégep de Jonquière – Arts et technologie des médias | ATM
- Cégep du Vieux-Montréal
- Lost Boys School of Visual Effects
- School of Digital Arts, Animation and Design at the University of Quebec at Chicoutimi | NAD-UQAC
- HEC Montréal
- INIS
- ISART Digital
- UQAT

## PROFESSIONAL SERVICES

- National Bank | NBC
- BFL Canada
- NATIONAL Public Relations Firm
- St. Lawrence Law Firm
- Demers Beaulne
- Globalex/Front Row Insurance
- KPMG
- PricewaterhouseCoopers | PWC
- Raymond Chabot Grant Thornton | RCGT

# TAX INCENTIVES



## COMPETITIVE MONITORING

The QFTC and its partners carry out competitive monitoring on an ongoing basis in order to maintain the province's competitiveness for the entire audiovisual sector of Quebec. Several indicators remain on our monitors, and among them, tax incentives are always high on our list of priorities.

Admittedly, the first months of the pandemic put a stop to the lively competition that the different areas are engaged in, but now the strong recovery is presenting windows of opportunity that we mustn't miss.

## RISE OF THE CANADIAN DOLLAR

After remaining stable at around 75 cents U.S. for several years, the value of the Canadian dollar surreptitiously rose during the pandemic and now hovers at around 82 cents U.S. At the Canadian level, this means a slight loss of competitiveness vis-à-vis international competitors, who are engaged in a relentless struggle to attract the significant production volume that will accompany and drive the recovery of our sector. The Council will monitor this point closely.

## CONTINUATION OF TAX CREDITS FOR VISUAL EFFECTS AND ANIMATION

The visual effects sector has seen annual growth upwards of 20% for 10 years. Apart from the pandemic year, this growth is bound to continue for the years to come if the conditions for its success remain present. The tax incentives currently in place have made Quebec one of the main visual effects hubs in the world. It is important not only to maintain them but to reassess their competitiveness regularly at the international level while competing territories also try to get their share of the market.

It's important to note that jobs created in the visual effects and animation sectors have risen steadily and that the median annual salary is currently \$82,500.



## NO CHANGE FOR THE REGIONAL TAX CREDIT ENHANCEMENT

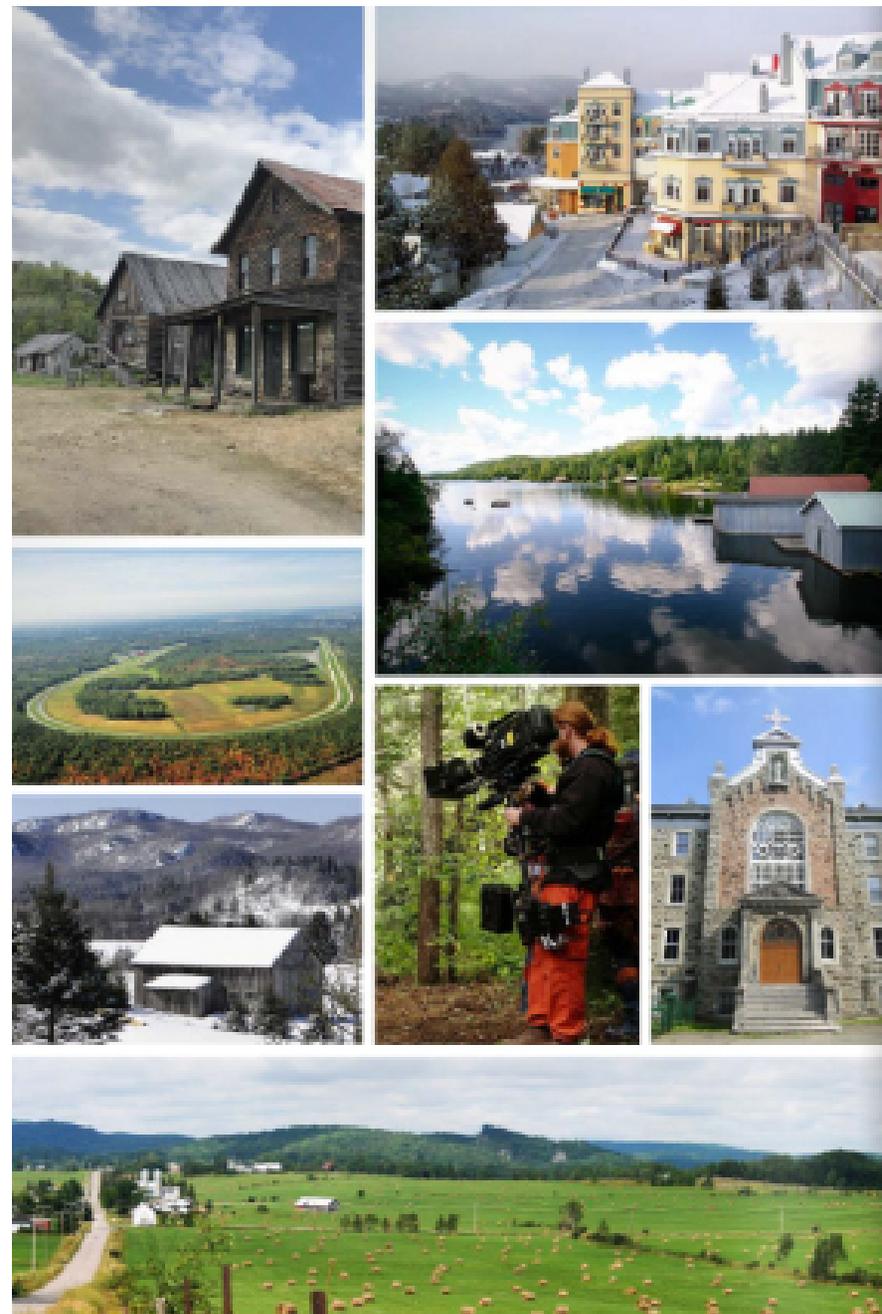
The QFTC attempted twice, with the support of several industry partners, to raise the Government of Quebec's awareness concerning the fact that the current regional tax credit enhancement results in significant loss of competitiveness for our regions, as well as for the entire industry across Canada.

However, our goals are very concrete: to recover more than \$80M in business volume, to put our regions to the screen in order to boost their promotion and visibility, to develop a multi-screen production economy for the greater benefit of the regions and, lastly, to ensure that the regional tax credit enhancement is based on fair and inclusive economic reasoning.

The Council will continue its representation efforts to convince the government that a regional tax credit enhancement based on total expenses in the region can be a win-win solution for all stakeholders in the sector.

## AUTHORIZED PARTNER

demersbeaulne



*Photo credit: Taken from the 2021 Quebec Film Sourcebook*

## CAPACITY INCREASE – INFRASTRUCTURE

At the very end of 2020-2021, the QFTC conducted a study on behalf of the Ministère de l'Économie et de l'Innovation and other partners, to double the capacity to accommodate foreign productions in Montreal. The details of this study are presented in the Live Action section (see page 59).

This study also provided an opportunity, at the Ministère's request, to make recommendations related to the establishment of tax measures that would support the development of new infrastructure.

Three recommendations accompanied the presentation of the study carried out by Raymond Chabot Grant Thornton on behalf of the QFTC:

- The first recommendation was a measure enhancing tax credits based on recurrence and business volume. Thus, a foreign producer who comes to Quebec year after year for their filming projects and maintains a large volume of production would be granted an additional enhancement based on these two criteria.
- The second measure recommended is aimed directly at the seasonality issue. This measure would help encourage producers to come to Quebec during the low season, from December to April.
- Thirdly, as mentioned earlier in this section, the study reiterated the importance of reviewing the criteria for the regional enhancement available as part of the tax credits for audiovisual productions, both local and foreign, by pointing out that, in its current form, the regional enhancement does not meet its objectives.

# ROLLING GREEN





## THE PROJECT

The audiovisual industry has a big impact on our environment:

- The average carbon footprint of big-budget films is estimated at **3,370 metric tons**, or 33 metric tons per shooting day.
- TV series consisting of one-hour episodes produce an average of **77 metric tons of CO<sup>2</sup>** per episode.\*

In this context, it is important for the audiovisual industry across the world to mobilize to reduce its footprint.

Like the big U.S. studios, **the shift to environmental responsibility for Quebec film sets has become a priority** if Quebec wants to position itself as a leader in sustainable audiovisual productions.

*\*Data from the Sustainable Production Alliance, a consortium whose members are among the largest production companies in the United States (Amazon, Disney, NBCUniversal, Netflix, etc.).*

## PROJECT LAUNCH

### THE PROJECT WAS OFFICIALLY LAUNCHED ON APRIL 30, 2021

- Drafting of a three-year project activity and funding plan by the Founding partners (partnership and visibility plan).

To mobilize our industry and represent all its issues, decisions related to the **Rolling Green** project will be made jointly with the Governance Committee, which consists of:

- Founding Partners:
  - The QFTC, industry expert and treasurer
  - The CQEER, sustainability expert
  - Quebecor, production expert
- Team-building and Driving Partners
- Training Partner

The QFTC, in its capacity as the Secretariat of the Cluster and as an NPO, acts as the umbrella organization for the initiative, the project manager and the treasurer.

*\*Conseil Québécois des Événements Écoresponsables*

**ON TOURNE VERT** **COUPEZ LE MOTEUR!**

UN MOTEUR QUI TOURNE AU RALENTI CONSOMME EN MOYENNE **1,8 LITRE D'ESSENCE PAR HEURE**

UN MOTEUR EN MARCHÉ AU RALENTI 10 MINUTES PAR JOUR FAIT GASPILLER **100 LITRES D'ESSENCE PAR ANNÉE**

**LES VOITURES SONT PARMI LES PRINCIPALES RESPONSABLES DU SMOG URBAIN ET DE LA DÉTÉRIORATION GÉNÉRALE DE LA QUALITÉ DE L'AIR**

**38% DES ÉMISSIONS DE GES SONT CAUSÉES PAR LE SECTEUR DES TRANSPORTS AU QUÉBEC**

**ONTOURNEVERT.COM**

## ROLLING GREEN: TOOLKIT LAUNCH

- **Environmentally responsible production guide** (practical advice for each of the departments of a production) as well as an Environmentally Responsible Production Guide during the COVID-19 Pandemic
- **Dedicated website:** [ontournevert.com](http://ontournevert.com)
- Directory of **environmentally responsible suppliers**
- **Signage** for film sets
- Rolling Green **Commitment Charter**
- 3-level Rolling Green **accreditation program** for productions (5 pilot projects in the process of accreditation)
- **Launch of a Facebook group** for sharing good practices for the local industry

### Coming in 2021–2022:

- **Carbon calculator** customized to Quebec's realities (clean, renewable energy)
- **Sustainable production training** developed in collaboration with the Institut National de l'Image et du Son (INIS) and the École Supérieure en Art et Technologie des Médias (ATM) for **current and future talents**.

[ONTOURNEVERT.COM](http://ONTOURNEVERT.COM) →





**TRAINING**

**TEAM-BUILDING**

**FOUNDING**

**DRIVING**

**UNIFYING**



This project is also supported by its green ambassadors:

The Association québécoise des techniciens et techniciennes de l'image et du son (AQTIS) IATSE Local 514, the Association québécoise de la production médiatique (AQPM), the Association des Réalisateur et Réalisatrices du Québec (ARRQ) and the Quebec section of the Directors Guild of Canada (DGC).

## 2020-2021 ACTIVITIES

**WEBINAR #1:** Organization of a webinar in collaboration with the CQEER on July 13, 2020, on the topic “Plateaux écoresponsables : allier écogestes et mesures sanitaires” (Environmentally responsible sets: combining environmentally friendly practices and health measures during the COVID-19 pandemic).

- **144 people** attended (initial goal: 60 attendees)
- **622** people visited the registration page
- The invitation open rate for the three invitations was 44%, or an **average of 450 people**.

**Facebook group:** following the webinar, the QFTC created a Facebook group for sharing good practices in order to maintain ties with this community while awaiting the official launch of the Rolling Green project.

As of May 19, 2021, the group had 241 members.

**WEBINAR #2:** Organization of a webinar on November 12th on the topic “Célébrer nos plateaux écoresponsables” (Celebrating our environmentally responsible sets) as part of the Vivats 2020 ceremony, organized by the CQEER, which rewards environmentally responsible events.

**Webinar guests:**

- **Anaïs Barbeau-Lavalette** (Director, Goddess of the Fireflies),
- **Sandrine Gros d'Aillon** (Executive Producer, The Bold Type)
- **Modérateur: Andrew Robinson** (Principal Consultant, Sustainability Strategy and Engagement, Green Spark Group – Set Sustainability Consultant)

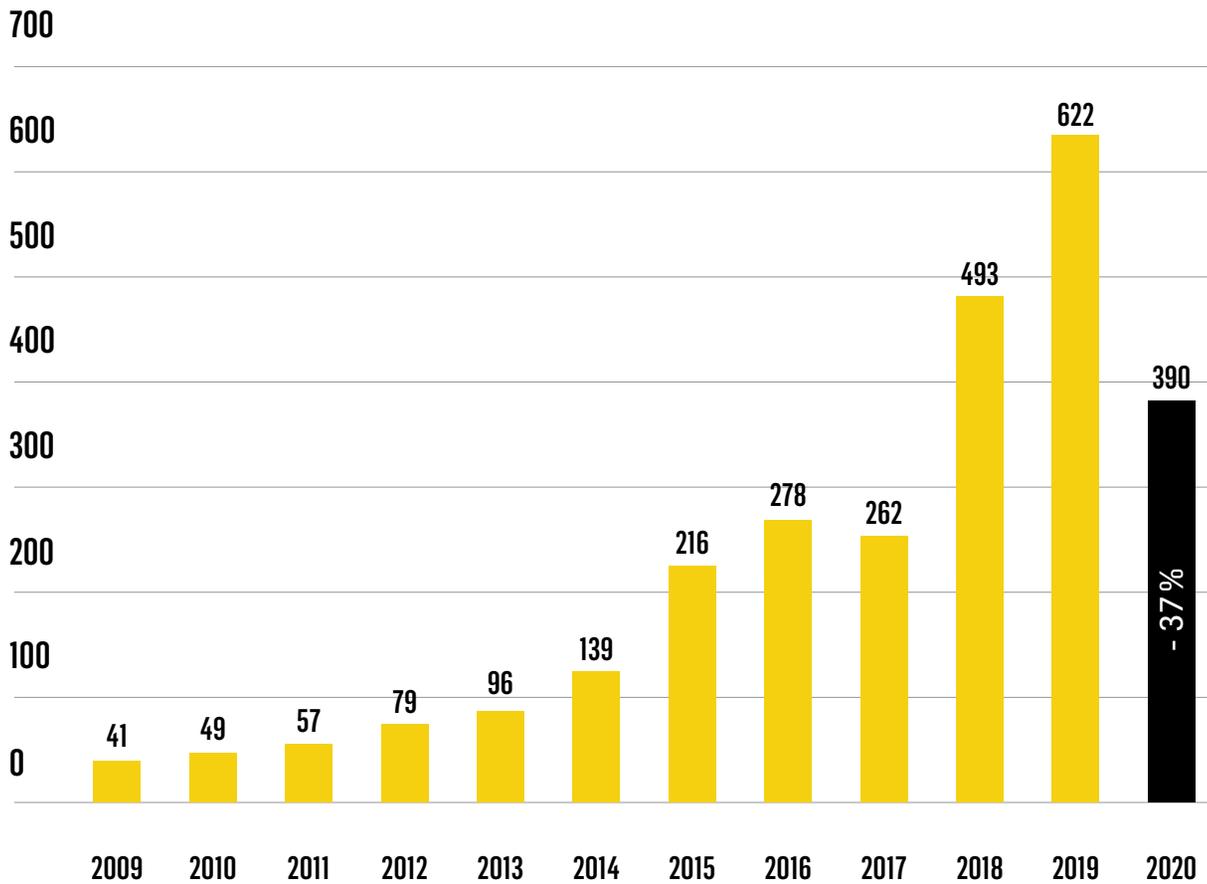
**60 people attended + 52 people watched the webinar in replay** (as of January 11, 2021).

[TO WATCH OR REWATCH THE WEBINAR →](#)

# VISUAL EFFECTS AND ANIMATION



# CHANGES IN VOLUME OF BUSINESS FOR THE VISUAL EFFECTS SECTOR IN QUEBEC (IN CAD MILLION)



NO TIME TO DIE - JAMES BOND ©MGM & UNIVERSAL PICTURES. ALL RIGHTS RESERVED (COURTESY OF CINESITE)

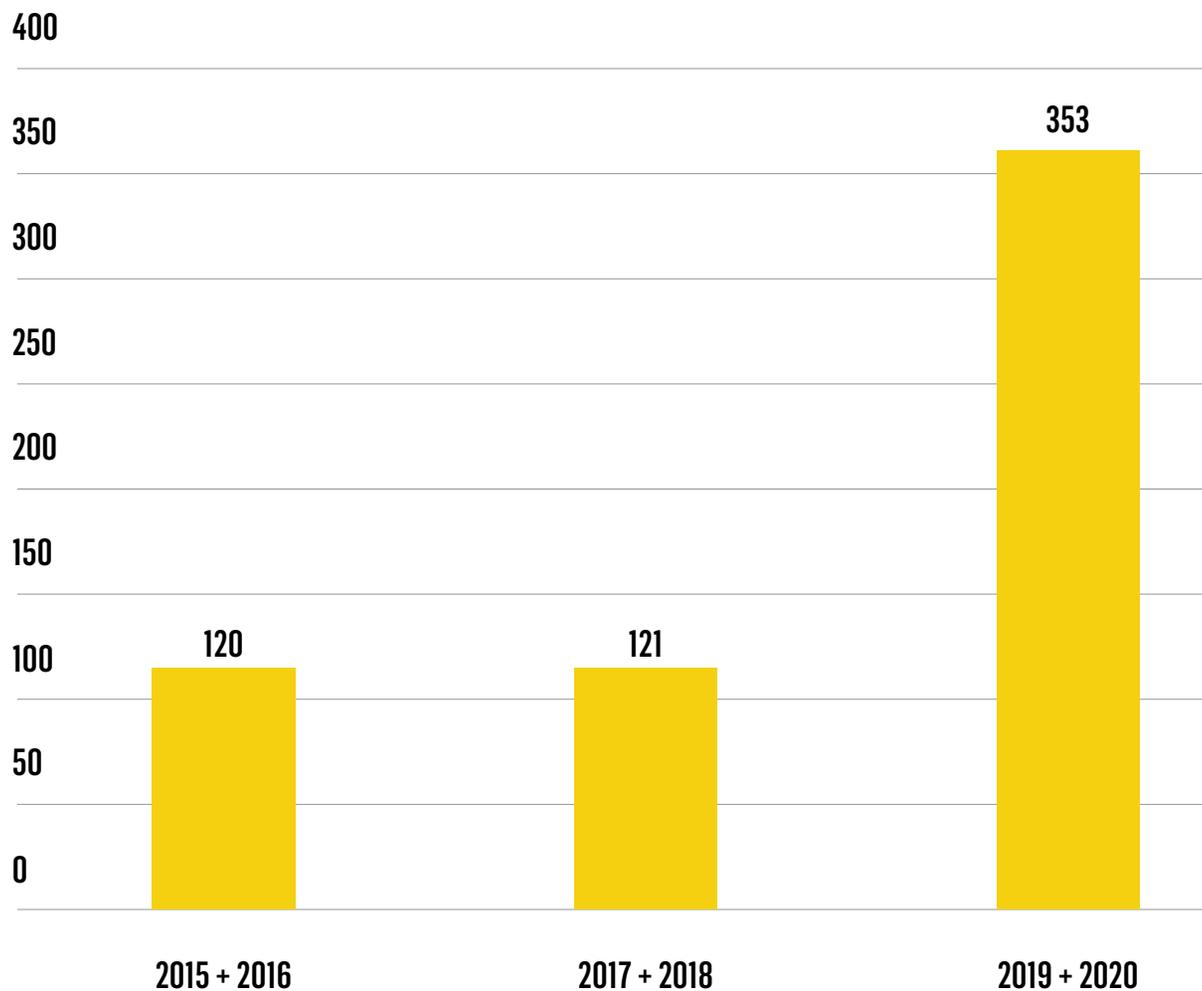


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FLORA & ULYSSES ©DISNEY+ ALL RIGHTS RESERVED (COURTESY OF FRAMESTORE)

# GROWTH IN VOLUME OF BUSINESS FOR THE ANIMATION SECTOR IN QUEBEC (IN CAD MILLION)



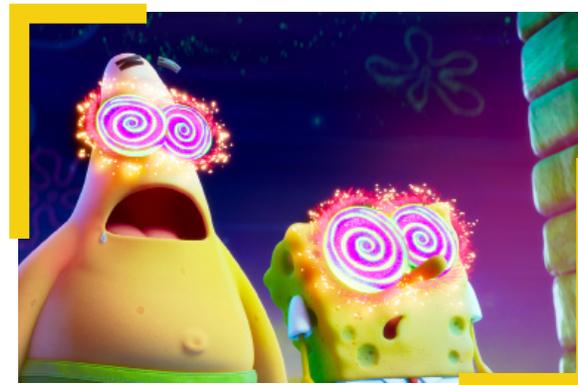
Animation (labour + service contracts)

Note: As animation contracts are usually completed over a 1- to 2-year period, the results are shown here in the form of totals per two-year increments in order to provide a better overview of changes in the industry.

Source: SODEC



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THE SPONGE BOB MOVIE: SPONGE ON THE RUN ©VIACOM INTERNATIONAL ALL RIGHTS RESERVED (COURTESY OF MIKROS ANIMATION)



CLASH ROYALE ©ELECTRO GIANT, SUPERCCELL (COURTESY OF SQUEEZE ANIMATION STUDIOS)

## IMPACT OF COVID-19

The QFTC conducted three surveys during the year to measure the impact of COVID-19 on the sector, including data on revenue declines and on jobs (temporary and permanent layoffs):

- On April 3<sup>rd</sup>
- On May 1<sup>st</sup>
- On October 1<sup>st</sup> (Visual effects only)

The Council also held consultation meetings with its members.

## FINDINGS:

The COVID-19 pandemic had a marked impact on the visual effects industry. In fact, even though the studios were able to transfer all their activities to remote work in a matter of a few days, the interruption of filming resulted in a reduction in the number of contracts, with a marked decrease in the summer and fall of 2020.

The situation was different for the animation sector, as their entire chain of production could continue to operate remotely. Thus, unlike visual effects, the animation sector saw strong business activity throughout the year. The results were shared with the government to inform them and allow them to take measures that meet the needs of this industry. The data was also shared with the members of the QFTC and on its networks.

## IN A NUTSHELL:

- Sharp drop in VFX activity in the fall of 2020 and winter of 2021.
- Strong recovery starting in the spring of 2021

### MAIN CHALLENGE: TALENT SHORTAGE

- Immigration issue: exodus of foreign talent who returned to their native countries during the pandemic, slower processing of work permits and strict quarantine measures.
  - The industry is faced with a significant reduction in the available talent pool, whereas the number of contracts is increasing.
- Mental health issue: feelings of isolation among workers during the lockdown and rise in cases of psychological distress.
  - It is crucial to support our workers to promote their retention.

## 2020 SURVEY – WAGES AND EMPLOYMENT

Every year, the QFTC compiles certain economic indicators from the visual effects (VFX) and animation sector in order to highlight their importance to policymakers, the industry and the general public. The survey, conducted by the independent firm KPMG, compiles statistical data concerning job numbers, wages and benefits, pay parity and immigration.

Of course, this year's figures reflect the impact of the pandemic on the visual effects sector, but show a strong recovery starting in June 2021, while animation continues its growth trajectory.

Also, this is the first year that data on the representation of trans and non-binary people in our industry has been included.

**23 studios participated, representing 90% of the workforce.**

**58% VFX Studios/42% animation studios**

**The QFTC would like to thank all the studios that participated.**

## AUTHORIZED PARTNER



**185+**

**PROJECTS COMPLETED IN QUEBEC**

**4,330 (-27%)**

**FULL-TIME EQUIVALENT JOBS**

**\$82,500**

**MEDIAN ANNUAL SALARY**

**32**

**MEDIAN AGE**

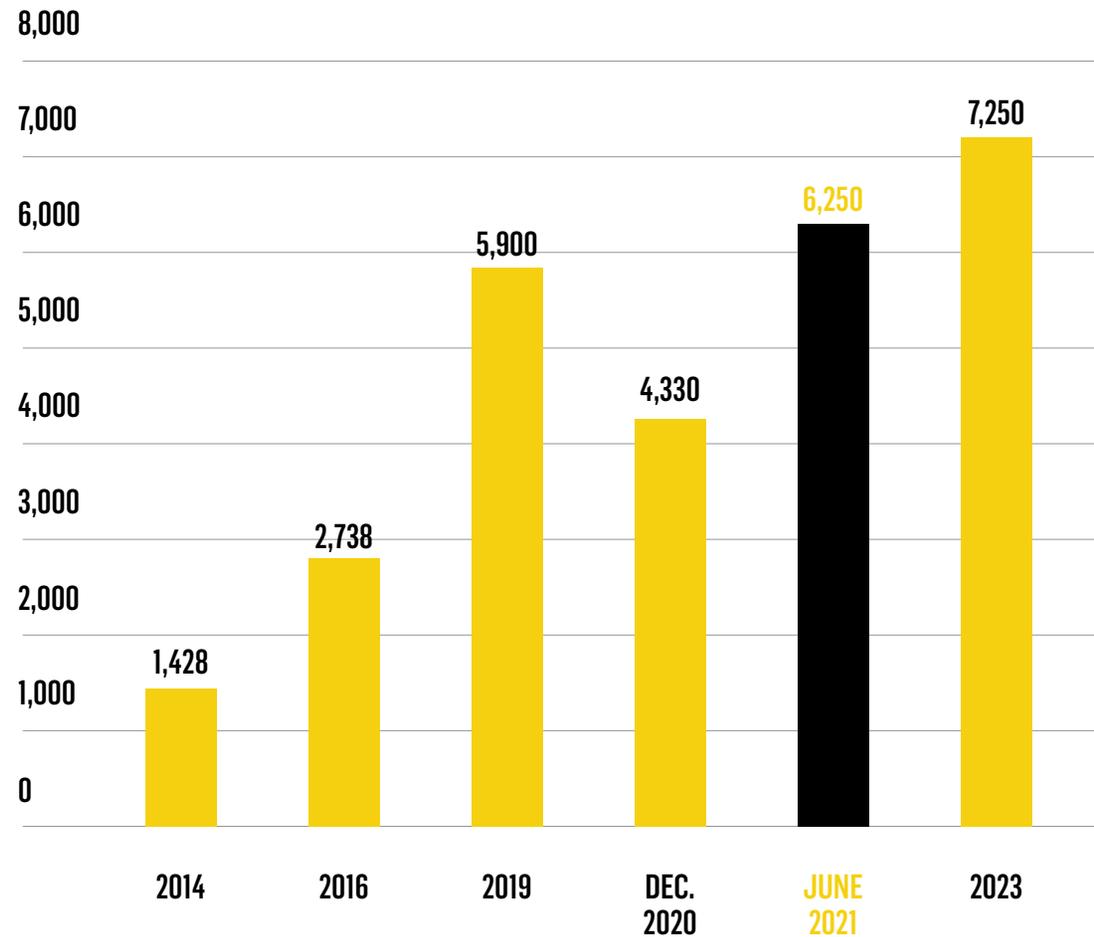
**70/28/2**

**MALE/FEMALE RATIO – ARTISTIC POSITIONS**

**66/33.9/0.1**

**MALE/FEMALE RATIO – ALL POSITIONS**

## CHANGES IN JOB NUMBERS FOR THE VISUAL EFFECTS AND ANIMATION SECTOR IN QUEBEC (ESTIMATED FTE)



Sources:

Survey on wages and employment, visual effects and animation sector, QFTC (2020)

Diagnostic des besoins en main-d'œuvre et adéquation formation-emploi - Secteur des effets visuels et animation (Diagnosis of workforce requirements and training-job fit - Visual effects and animation sector), QFTC and Conseil Emploi Métropole (2016)

PwC Analysis, QFTC - Annual Report (2011, 2012, 2013), Nordicity and the OCCQ (2009) Sondage sur l'industrie des effets visuels au Québec (Survey on the visual effects industry in Quebec) by PwC (2014)

# IMMIGRATION

## NEW PERMANENT IMMIGRATION PROGRAM

The Government of Quebec established a new permanent immigration pilot program for workers in the artificial intelligence, information technology and visual effects sectors on April 22, 2021.

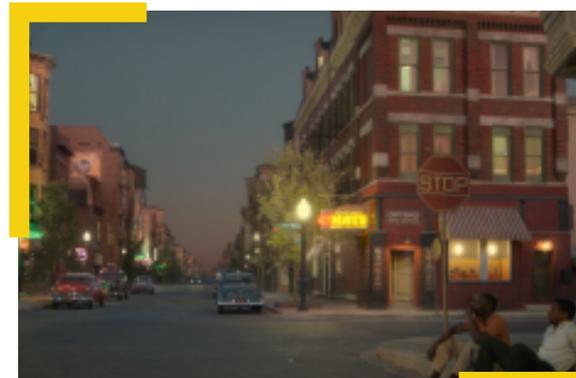
The program had been released earlier, in the fall of 2020, to get industry feedback. The QFTC consulted its members and forwarded their comments on the parameters proposed.

**The Council is pleased with the establishment of this new initiative, which finally officially recognizes this leading sector's importance for Quebec's economy, while highlighting its increased need for qualified labour in order to continue on its path of exponential growth, a major source of economic benefits and visibility for the province.**

However, we will bring up the issue of the very limited number of openings available right now, which amounts to only 275 openings per year for the IT and visual effects sectors combined. As this is a pilot program, it is understood that this number is a legislative limitation imposed for the initial years and that it could be revised.



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## 1<sup>ST</sup> SESSION OF THE LEADERSHIP AND TEAM MANAGEMENT TRAINING PROGRAM FOR FEMALE ARTISTS IN VFX/ANIMATION (SEPTEMBER 15 – OCTOBER 27)

The program was created to increase the percentage of women holding supervisory positions (currently only 13%). **The first session was supposed to start in March, but was postponed to September due to the pandemic.**

- Training was switched to an online format consisting of 12 two-hour classes.
- The QFTC reviewed the budget and offered the course free of charge during the pandemic.
- The course was full: 26 women from 20 different studios.
- 100% of the participants recommend this training program to women interested in a VFX/animation career.
- Second cohort: May 2021

**AVERAGE GRADE FOR TRAINING PARTICIPANTS: 4.7/5**

## RELEASE YOUR CREATIVITY PROJECT

The Release Your Creativity project, which will run for two years, was developed as part of the City of Montreal's "Accélérer les Talents" initiative. Dedicated to attracting and retaining talent in the visual effects and animation sector, it consists of three components.

*"I really liked the content of this training program. I learned a lot, especially during this difficult period, and I was able to use a lot of the concepts and methods I learned at work."*

– Quote from a participant

Montréal 

ÉCOLE  
NAD  
UQAC

CARIBARA  
MONTREAL

ONEG

FRAMESTORE

METHODSTUDIOS

REEL FX  
ANIMATION

technicolor  
MONTREAL

## MENTORING PROGRAM FOR YOUNG GRADUATES

Development of a 6-month program in which support is provided by an industry professional to facilitate the school-to-studio transition and increase the retention of recent graduates (initial or requalification training).

- Training program offered twice in 2021 – Duration: 6 months
- Recruitment launched in December 2020 for the first cohort, whose training began on January 14, 2021. / Recruitment launched in April 2021 for the second cohort
  - Mentees recruited from among the graduating students of Montreal's visual effects and animation schools
  - Mentors recruited from among the QFTC's member studios
- Program developed in collaboration with École NAD-UQAC and Mentorat Québec.

Montréal 

ÉCOLE  
NAD  
UQAC

CARIBARA  
MONTREAL

ONEG

FRAMESTORE

METHODSTUDIOS

REEL FX  
ANIMATION

technicolor  
M P C

## INCLUSION, DIVERSITY AND WELL-BEING AT WORK

The QFTC partnered with the Visual Effects Society – Montreal Chapter, to develop a podcast series consisting of 5 episodes on mental health at work.

- The goal was to offer support to all artists during the pandemic, as well as free access to professional content and proven tools and resources.
  - Reduce the feeling of isolation related to remote work among immigrant workers
  - Presence of a recognized professional from the VFX/animation industry in each episode to attract a wide audience
- Developed in collaboration with two psychiatrists from the Centre Hospitalier de l'Université de Montréal (CHUM/ University of Montreal Hospital Centre), 1 psychologist from the University of California, Los Angeles (UCLA) and a mental health performance coach.

Expected launch: Summer 2021

## GLOSSARY FOR THE 3D ANIMATION AND VISUAL EFFECTS SECTOR

The QFTC and SYNTHÈSE – Pôle Image Québec jointly developed a glossary for the 3D animation and visual effects sector. The aim of this free, open-access tool is to promote the use of the correct French terminology in the industry.

The mission of the glossary is to provide French-language references for the visual effects and animation industry to help artists, human resource professionals, instructors and all workers in the sector to find the correct specific terms to use when interacting and when drafting documents or job postings.

A dedicated website was created, providing a modern, dynamic and easy-to-use platform. The site is referenced on VFX-Montreal.com and PoleSynthese.com.

The French-language glossary for the visual effects and animation industry was created through the support of the **Office québécois de la langue française**. The web platform was developed by the agency Atoll Digital.

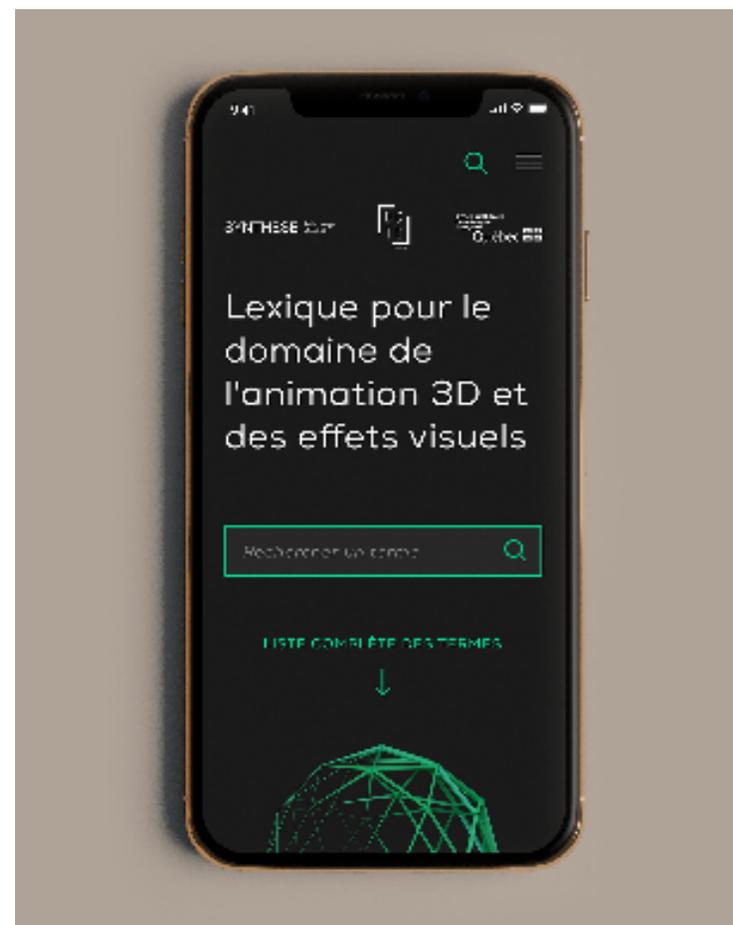
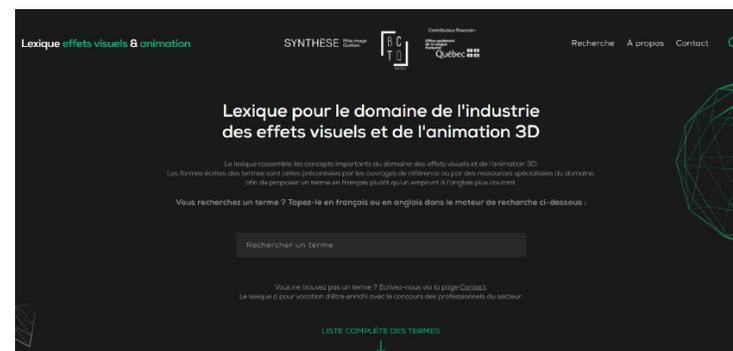
It was released in February 2021.

HAVE A LOOK AT THE GLOSSARY →

WITH THE FINANCIAL CONTRIBUTION OF:

Office québécois  
de la langue  
française  
Québec

4,500  
VISITORS SINCE  
ITS LAUNCH



## ARTIFICIAL INTELLIGENCE AND VISUAL EFFECTS SYMPOSIUM

In the fall of 2020 and the winter of 2021, the QFTC worked to organize an event about the connections between artificial intelligence and visual effects/animation: the **VFX-AI Symposium** was held online on **April 28, 2021**.

The goal of this project, financed by Conseil Emploi Métropole, was to evaluate the impact that artificial intelligence technologies will have on workers in the sector in the coming years.

The **objective** was to organize a day of conferences and brainstorming workshops that would lead to the **production of a report summarizing the current state** of affairs and providing an action plan for adapting the skills of the workforce in the years to come.

- **Number of attendees:** 100+ professionals from the AI and VFX sectors.
- The Council retained the services of the agency Kaliko Productions to assist it in the production of the event.
- The **École UQAC**, **Montréal International** and **Synthèse – Pôle Image Québec** were partners in this initiative.



## SHOWCASE EVENT

- A process was initiated at the end of 2019, with a task force made up of 10 studios, to consider creating a professional event dedicated to the sector that would meet industry needs (talent attraction, innovation, good practice sharing and community spirit).
- In 2020, the committee reiterated its interest in organizing such an event, in an online format, **to provide an international showcase for Quebec talent and its companies** in anticipation of the recovery.
- The QFTC retained the services of the agency Kaliko Productions to produce the business plan for this event. Consultations began in December 2020 and a document will be submitted to the QFTC's Board of Directors and to the task force in 2021.

## HUB MONTREAL

*(November 16–17, 2020)*

### Partnership for the 4<sup>th</sup> year in a row

As part of its mission of supporting the growth and visibility of the industry, the QFTC partnered with Hub Montreal for the 4th year in a row by sponsoring the showcase entitled “Creating Universes”.

For this occasion, Lüz Studio, LMDP Co., Thinkwell Studio Montréal and DNEG presented their projects, followed by a Q&A session.

The Council also held business meetings with potential partners during the event.



## SYNTHÈSE – PÔLE IMAGE QUÉBEC

SYNTHÈSE's mission is to foster interaction among stakeholders in education, research and creation and digital creative businesses towards common goals: the advancement of knowledge, training quality, artistic, scientific and technological innovation in all its forms and the vitality of our Quebec industry.

The QFTC has been a member of Synthèse's governance committee since its creation.

It also collaborates with its team on the joint development of projects that will benefit the industry.

SYNTHÈSE Pôle Image  
Québec

## LAUNCH OF THE EXPERTS PLATFORM

The QFTC collaborated with SYNTHÈSE on the creation of a new **online training platform**, available free for its members in the VFX/animation sector.

The platform, entitled **EXPERTS**, was launched in September 2020 and met with great success.

**This platform represents a new perk for visual effects and animation studios that are QFTC members.**

EXPERTS

## VFX-MONTRÉAL.COM WEBSITE

### UPDATING OF THE SITE

In 2020, the QFTC undertook a review of the content of VFX-Montreal.com in order to update the site, with a view to the continuous improvement of the platform.

Monetization tools were also added to enable participation in funding annual site maintenance.

**The new version of the site will go live in the summer of 2021.**

The VFX-MONTRÉAL site, an initiative of the QFTC and the VFX Committee, was launched to strengthen the position of Quebec and the City of Montreal as an international visual effects production centre. VFX-MONTRÉAL quickly became the go-to website of choice for experts in the sector.

VFX-MONTRÉAL now **includes 41** Quebec visual effects, animation and virtual reality studios and schools.

## RESULTS

The website would logically have recorded a drop in visitor traffic in 2020, in the context of the COVID-19 pandemic. However, the results remain high.

**37,000 (-15%)**

UNIQUE VISITORS

**171,000 (-16%)**

PAGE VIEWS

**3,300 (-25%)**

APPLICATIONS  
SUBMITTED



# LIVE-ACTION PROJECT



# LIVE-ACTION: IMPACT OF COVID-19

All filming (local and foreign productions) stopped on March 13, 2020.

In the days that followed, the QFTC held several meetings of its **Live-Action Committee\*** in order to compile information on the situation of businesses in the sector to be able to provide key messages to the institutions that would determine what assistance measures would be provided. In fact, production services were not covered by the steps taken by the general cultural institutions and the Council wanted to ensure that this segment would be included in the considerations.

Below are the activities that the Council was involved in thereafter and throughout the spring of 2020.

*\*Term used to designate all Quebec companies working in the foreign film production service sector.*

## INDUSTRY PRIORITIES

- **HEALTH MEASURES GUIDE:** The QFTC participated in the work of the committee set up by the Ministère de la Culture et des Communications for the audiovisual sector to facilitate the resumption of filming. Several meetings were held, with the CNESST in attendance, to prepare a guide for the implementation of health measures, taking into consideration the specific nature of the sector.
- **INSURANCE:** The Council also monitored this priority subject daily.

## QFTC'S INITIATIVES AND ACTIVITIES

- More frequent meetings of the Live-Action Committee to promote dialogue + Presence of special guests in connection with the issues of the moment
- Implementation of impact surveys and sharing of results with the different levels of government
- Participation in provincial and Canada-wide committees: CNESST Committee, Production Industry Task Force, Film Commissions Advisory Committee – APFTA, Canadian Film and Television Commissions Network
- Competitive monitoring: Compilation of international data, press reviews and sharing of reports of the different Live-Action Committee action groups.
- Letter to the Quebec Premier co-signed by 8 organizations from the sector to authorize the rental of public places for filming in red zones in the fall of 2020.

## IMPACT STUDY: INCREASING INFRASTRUCTURE CAPACITY

For a few years, the QFTC and the different sector stakeholders have been looking for solutions that would lead to a significant increase in the economic benefits related to foreign filming activities in Quebec.

We were able to determine that an increase in the number of facilities was necessary, as existing studios are operating at full capacity.

Therefore, in collaboration with the independent firm RCGT, the **Ministère de l'Économie** and several major industry stakeholders, the Council conducted an impact study last winter that allowed them to examine in detail the parameters and conditions that would enable the addition of new infrastructure to existing facilities in order to increase – if not double – our film production capacity.

## AUTHORIZED PARTNER



## THANK YOU TO THE STUDY'S COLLABORATORS



**AQTIS**  
514  
**AIEST**



**GRANDE**  
STUDIOS



**MELS**



## IMPACT STUDY: INCREASING INFRASTRUCTURE CAPACITY

(CONT.)

More specifically, the following points were considered as part of this study:

- **Benchmark comparison of surface areas of available studios and of investments made** and/or to come for studios in the competing cities of Toronto, Vancouver, New York and Atlanta;
- Development of a **profile of the characteristics of new audiovisual production facilities**, documentation of investment costs required for a new studio and identification of land available in the Montreal metropolitan area;
- **Evaluation of the potential economic benefits** in terms of value added to the GDP and jobs created in connection with the expansion of production infrastructure;
- **Completion of a review of the tax incentives available** for the audiovisual production sector and of proposed recommendations for adapting them (see tax incentives section).



Photo credit: © Alexandre Choquette - Tourisme Montréal

# INTELLECTUAL PROPERTY



## **PROMOTING THE EMERGENCE OF AN OWNERSHIP ECONOMY IN THE AUDIOVISUAL AND VIDEO GAME SECTORS**

This was the title of Volumes I and II of the study on intellectual property submitted to the Ministère de la Culture et des Communications and the Ministère des Finances respectively on May 22, 2018 and March 25, 2019.

The premise was simple: over the last 20 years, Quebec has built, in the visual effects and animation fields, a production ecosystem based on a service economy. Today we must acknowledge the resounding success of this strategy for growth and for the creation of good-paying jobs, which belongs to the new creative industry economy.

That being said, in a context of content globalization, it is essential to simultaneously build an equally thriving ownership economy in order to enjoy, in Quebec, the economic benefits related to our content royalties. As you may remember, the QFTC, in collaboration with PWC, created a task force responsible for examining these issues.

## **TAXATION AND SUPPORT FUND**

First, to encourage the development of new intellectual property, we recommended the establishment of a tax deduction on royalties from the sale of content whose intellectual property is created and managed in Quebec.

The second recommendation was aimed at getting partial tax exemption for the remuneration of experts from abroad who are in Quebec to train publishing specialists in the art and science of distributing content to major markets. Finally, our third recommendation was for the creation of a development fund that would support prototyping, production and the entire commercialization process for each of the sectors.

## **REMINDER OF OBJECTIVES**

The cornerstone of such a strategy is the development of intellectual property in Quebec intended for international markets. To do this, we had to draw up a list of measures that would be able to adequately support the achievement of this objective. After many consultations with the main stakeholders, namely, animation and video game producers, three areas of intervention were developed.

## 2020–2021 PROVINCIAL BUDGET

In the 2020–2021 budget speech, delivered just a few hours before the WHO declared the global pandemic, stimulative investments were announced, including a record budget for Culture that would provide assistance to artistic production, particularly in the audiovisual sector. Here are some of these measures, by way of reminder:

- Promote the development of high-potential television productions and their distribution to local and international markets, particularly by relying on the exploitation of intellectual property.
- Support the creation and production of animated films and series and the export process (prototyping);
- Create an incentive deduction for the commercialization of innovations (IDCI) allowing qualifying companies to reduce their Quebec tax rate on income derived from the commercialization of certain intellectual property assets.

## OBSERVATIONS

When examined in detail, these measures partially meet the recommendations of the study submitted by the QFTC. The Council and its partner PwC are indeed satisfied with some of the provisions proposed but are puzzled regarding the eligibility of audiovisual productions for the IDCI measure. On the face of it, the measure seems more favourable to the video game sector. This is an issue that the QFTC will continue to monitor attentively in the year to come.

In this regard, the QFTC continues its collaboration with PwC, Alliance Québec Animation and the *Guilde du Jeu Vidéo du Québec* to keep its intellectual property proposals up-to-date, with an eye to promoting the recovery, continued existence and international visibility of the Quebec animation industry.



# BUSINESS INTELLIGENCE



## MEETINGS WITH BROADCASTERS/VOD PLATFORMS

In the fall of 2020, in the context of the pandemic but also of more profound transformations affecting the entire audiovisual production value chain, the QFTC's Board of Directors decided to organize consultation meetings with six broadcasters and VOD platforms.

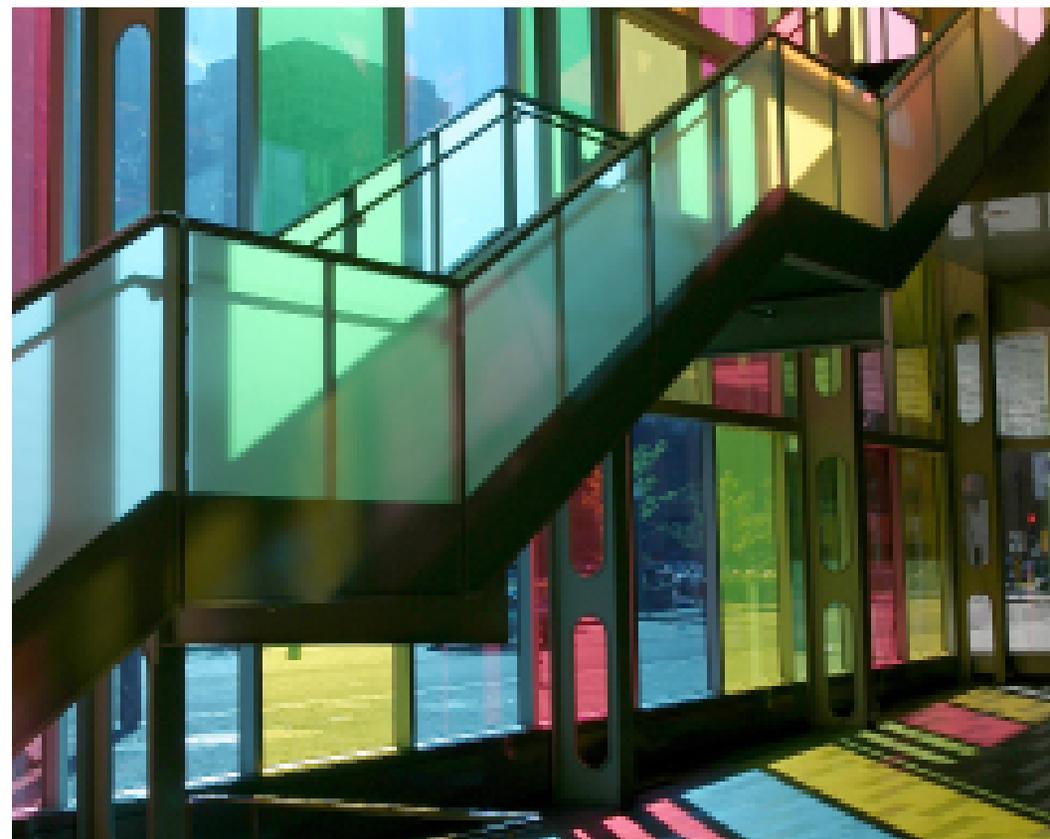
The aim of these meetings was to get industry feedback, confirm the development of the chain of production and identify the major challenges of the years to come.

The companies met with are the following:

- Amazon Studios
- Bell Media
- NBC Universal
- Netflix
- Québecor
- Radio-Canada

One of the main issues brought up by the stakeholders we met with was that of Quebec's capacity to accommodate foreign filming.

**If it wants to support and increase the growth of the live-action sector, it is crucial for Quebec to develop new infrastructure for the film industry. (see Impact study: increasing infrastructure capacity, page 59).**



*Photo credit: Palais des congrès de Montréal*

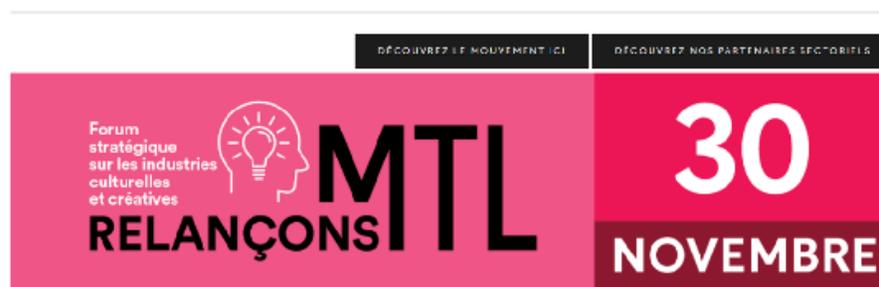
## RELAUNCH MTL – STRATEGIC FORUM ON CULTURAL AND CREATIVE INDUSTRIES

The QFTC was a partner in the Chamber of Commerce of Metropolitan Montreal's **Relaunch MTL** initiative, supported by the Government of Canada, the Government of Quebec, the Communauté Métropolitaine de Montréal and the City of Montreal, in association with Investissement Québec and in collaboration with the Palais des Congrès de Montréal.

The Council was a strategic partner for the **cultural and creative industry sector**, along with the **Guilde du Jeu Vidéo du Québec** and **Culture Montréal**.

- They collaborated on drafting an analysis of the state of affairs and a specific action plan (produced by KPMG), followed by the organization of a **Strategic Forum on Cultural and Creative Industries**, held on November 30, 2020.

Codéveloppé par :



The action plan produced by KPMG showing the context, challenges and possible solutions for cultural and creative industries can be found here:

[HAVE A LOOK AT THE ACTION PLAN →](#)

## THE QFTC'S 1ST FUNDRAISING EVENT

For the very first time, the QFTC had planned to hold a fundraising event on March 12, 2020 to raise funds for the promotion of Quebec internationally as a filming destination and to support the different projects undertaken by the Audiovisual Cluster to meet the challenges of the industry, such as the labour shortage, the sustainability of film shoots and intellectual property.

COVID-19 restrictions forced us to postpone the event. The Council took the time to monitor changes in health measures and finally reworked the format of the event in order to offer an innovative, quality virtual experience.

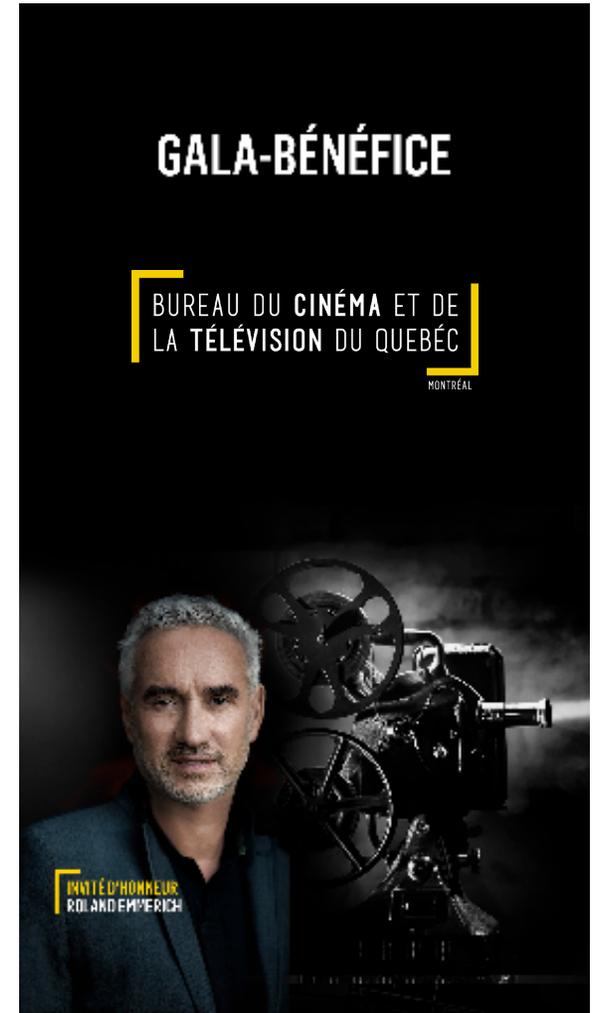
**Finally, on March 10, 2021, the Quebec Film and Television Council held its very first fundraising gala online.**

Hosted by Meeker Guerrier, the evening kicked off with official speeches by the Ministre de l'Économie et de l'Innovation, the Ministre du Travail, de l'Emploi et de la Solidarité Sociale, the Ministre de la Culture et des Communications, the Mayor of Montreal and the CEO of the SODEC, as well as the Chair of the QFTC's Board of Directors.

- This was followed by a 30-minute interview conducted by Brendan Kelly, a journalist at the Montreal Gazette and Taste Test Dude on CBC Radio, with our guest of honour, Roland Emmerich.
- A Montreal regular, Roland Emmerich has filmed most of his feature films in the city, including Moonfall, his next big-budget film scheduled for release in 2022.
- The evening continued with a series of moving tributes from close collaborators of Roland Emmerich's in Quebec. Finally, the Indigenous artist Alanis Obomswain presented one of her works as a gift to Roland Emmerich.

**The success of this event was made possible by the valuable support of our partners, Difuze, Grandé Studios and Lionsgate.**

**188 people had tickets to attend the Fundraising Gala.**



# COMMUNICATIONS



# PROMOTIONAL TOOL

## WEBSITE

Thanks to its information-rich content, the QFTC's website is frequently visited by all its members and by producers seeking specific information.

Some sections of the site are intended specifically for foreign producers, members and for assistance in calculating tax credits.

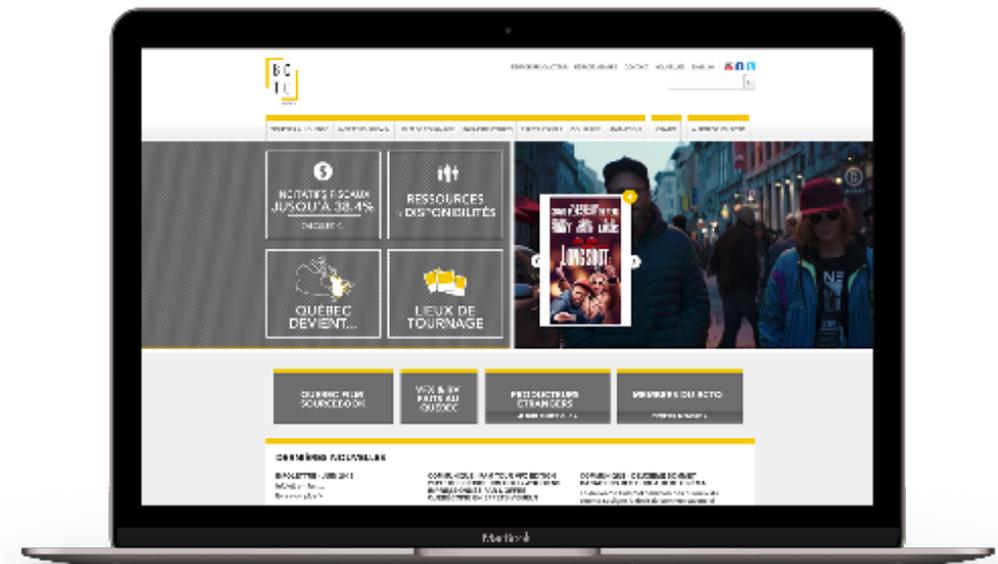
The site is bilingual, with French and English versions, and most visitors are from Canada and the United States. 30% of visits are via mobile devices.

Because technologies have changed very quickly in recent years, and to guarantee an optimal browsing experience regardless of the platform, the QFTC plans to overhaul its website in 2021, the year of its 15th anniversary, to allow it to meet new search engine optimization standards for websites.

[QFTC.CA](https://qftc.ca) →

**43,485**  
USERS  
ANNUALLY

**115,492**  
PAGE VIEWS  
ANNUALLY



# PROMOTIONAL TOOLS

## QUEBEC FILM SOURCEBOOK

Adopted by international clients and greatly appreciated by QFTC members, the Quebec Film Sourcebook (QFSB) is an important marketing plan for foreign producers interested in filming in Quebec, as well as a guide for the local industry.

Rich in content, it contains all the essential information needed for a successful project: professional resources, the regions, tax incentives, infrastructure, etc.

We share the QFSB with foreign producers during discussions to attract a production to Quebec, as well as at markets and business trips abroad.

In addition to handling the entire production of the directory, the QFTC updates it monthly in order to offer a cutting-edge tool to foreign producers. The Quebec Film Sourcebook is available in PDF and HTML5 flipbook formats.

HAVE A LOOK AT THE SOURCEBOOK →

**1,000**

READS ANNUALLY  
ON HTML5 FLIPBOOK

**2,500**

ANNUAL VIEWS ON THE QFSB  
PAGE OF THE QFTC'S SITE

## EMAIL COMMUNICATION

To increase its visibility among the industry at the local level, the QFTC has, since the fall of 2015, distributed a monthly newsletter highlighting the latest news about its activities and the different events it takes part in. This newsletter creates a regular opportunity to connect with the members of the QFTC, as well as with potential future members. It is sent out in both French and English.

The implementation of an automated software program for managing contacts and marketing campaigns (InfusionSoft) in the spring of 2019 also helped us establish regular communications with targeted groups such as film commissions and Prestige Partners and run invitation campaigns for events and projects organized by the QFTC (e.g. the fundraising gala, webinars, membership renewal).

Thus, this tool allows the QFTC to communicate more regularly and efficiently and to better analyze results.

QFTC NEWS →

**1,211**

NEWSLETTER  
SUBSCRIBERS

**42%**

AVERAGE  
OPEN RATE

# PROMOTIONAL TOOLS

## SOCIAL NETWORKS

The QFTC is present on the three main social media platforms for B2B digital communication: Facebook, LinkedIn and Twitter.

Through its online presence, the QFTC hopes to strengthen its ties with its members and partners, inform them of the organization's activities and position itself within the industry.

Between April 1, 2020 and March 31, 2021, the QFTC posted 3 to 5 times a week on each platform.

The goal is to keep up this pace in order to be a reliable, regular source of news about Quebec's audiovisual sector for our members and followers.



**1,536 (+14%)**

**FOLLOWERS ON FACEBOOK**

**1,805 (+63%)**

**FOLLOWERS ON LINKEDIN**

**905 (+23%)**

**FOLLOWERS ON TWITTER**

# PRESS REVIEW

**380 (+81%)**  
MENTIONS OF THE QFTC IN  
THE MEDIA IN 2020-2021

**12**  
PRESS RELEASES SENT  
TO JOURNALISTS

**24M**  
AVERAGE POTENTIAL  
REACH PER MONTH



LaPresse.ca • Luc Boulanger  
CA | Nov 26, 2020 • 10:15 AM

Tournages et mesures sanitaires : le Québec s'en sort bien

producteurs de Los Angeles... » Surfer sur l'optimisme Au **Bureau du cinéma et de la télévision du Québec (BCTQ)**, on espère que le retard dans



LaPresse.ca • Vincent Brousseau-Pouliot  
CA | Feb 4 • 6:00 AM

Le Québec espère une année record

, on pourrait briser le plafond de 400 millions », dit **Pierre Moreau**, PDG du **BCTQ**, l'organisme responsable des tournages étrangers et de



ICI Radio-Canada.ca  
CA | Feb 4 • 7:47 PM

Accueil Info Arts Cinéma Les tournages de productions américaines repartent en trombe au Québec

du Québec, selon **Chanelle Routhier**, commissaire au **BCTQ**. Photo : **Bureau du cinéma et de la télévision du Québec** Une des raisons qui explique



CTV Montreal News  
CA | Nov 8, 2020 • 4:55 AM

Action! Montreal's film industry back at work, despite COVID-19 measures

now we're looking forward to the new year," said **Quebec Film and TV Commissioner Chanelle Routhier**. There are new rules in place: foreign



# REPRESENTATION AND PUBLIC RELATIONS

Every year, the QFTC is present at key industry events locally and internationally. It also partners with several major events at the national level that allow it to strengthen existing relationships and to develop new collaborations with the entire Quebec audiovisual sector.

- **JUNE 2020** Annecy International Animation Film Festival (MIFA)
- **JUNE 2020** AGM of the QFTC
- **JULY 2020** Webinar “Plateaux écoresponsables: allier écogestes et mesures sanitaires” (Environmentally responsible sets: combining environmentally friendly practices and health measures) – Rolling Green
- **JULY 2020** Fantasia – Frontières Market – Participation with Film Laurentides
- **SEPTEMBER 2020** Toronto International Film Festival (TIFF)
- **SEPTEMBER 2020** Launch of the Leadership and Team Management Training Program for Female Artists in VFX/Animation
- **OCTOBER 2020** MIPCOM
- **OCTOBER 2020** Launch of the new National Photo Library
- **OCTOBER 2020** Launch of the Experts platform by Synthèse
- **NOVEMBER 2020** Webinar “Célébrer nos plateaux écoresponsables” (Celebrating our environmentally responsible sets) - Vivats 2020
- **NOVEMBER 2020** American Film Market (AFM)
- **NOVEMBER 2020** Hub Montreal
- **NOVEMBER 2020** Strategic Forum on Cultural and Creative Industries
- **DECEMBER 2020** FOCUS Digital
- **DECEMBER 2020** FCTMN Gala
- **JANUARY 2021** Launch of the mentoring program for young graduates in the field of VFX/animation
- **JANUARY 2021** VR WINTER FAM TOUR
- **FEBRUARY 2021** Visual effects and postproduction economic mission
- **MARCH 2021** EFM – Berlinale
- **MARCH 2021** Launch of the Glossary for visual effects and animation
- **MARCH 2021** QFTC's Fundraising Event

# THANKS TO OUR PARTNERS



# PUBLIC PARTNERS



Développement  
économique Canada  
pour les régions du Québec

Canada Economic  
Development  
for Quebec Regions

Canada

Québec 

Avec la participation de :  
- SODEC  
- Ministère de l'Économie et de l'Innovation  
- Secrétariat à la région métropolitaine



Communauté métropolitaine  
de Montréal

Montréal 

VILLE DE  
QUÉBEC   
*l'accent  
d'Amérique*

# MAJOR PARTNERS



# PRESTIGE PARTNERS



# THANKS TO OUR MEMBERS

45 Degres Nord Inc.	Cégep de Matane	Framestore	Les Films Breakaway Inc.	Pierre Blondin	Studio Digilog/Net Post Production
AC Marriott Montreal Centre	Phi Centre	Gestion Avanti Cine Video Inc.	L'Hôtel Particulier	Pixomondo	Studio Element
Acmé Decors	Cinésume Post-Production Inc.	GINETTE GUILLARD	Lise Grégoire	Premiere Suites	Studio Notre-Dame
Airstar Québec Inc.	Cinesite Inc.	GRF Audio	Lost Boys School of VFX	Premium Sound Inc.	Studio Singing Frog Inc.
Alchemy 24	Clinique MedFuture	Hotel Griffintown	Luna Productions Inc.	Proaxion Inc.	Studio SRV
AQPM (Association québécoise de la production média)	Cluster Films	Groupe de Mossi	Mallette LLP	Productions Belzébuth	Reel FX Animation
AQTIS	Communications	Fair Play Group	Mark Chikhani	Productions Guy Lalande	Studios Saint-Antoine
ARRQ	TSUNODA International	Groupe Star Suites	Mathematic Studio	Promotion Saguenay	Synthèse (UQAC)
Artifex Animation Studios Inc.	Copilot Productions	HEC Montreal (Pôle Médias)	MCP Productions	Raynault VFX	Syon Media
Audio Z	Deedra Films	Hélène Boulay	Medhat Hanbali	Rayon FX	TONIC DNA
Bank of Montreal/BMO	Destination Sherbrooke (Sherbrooke Film and Television Commission)	Howlin' Blue Productions	Method Studios	RBC	Total Casting
BDO Canada LLP	DGC	IATSE 514	Michel Corriveau	Real by Fake	Traiteur Crew Call Inc.
Blue Spirit Canada Inc.	Digital Dimension	IATSE 667	Michel F. April	Residence Inn by Marriott Montreal Downtown	Transfilm International Inc.
Blue Tongues Production Inc.	Digital Domain	Image Communication Conseils Ltée	Mom Creative Industries, Inc.	Rhum Ressources et Humains Inc.	Triana Inc.
Bria Health	Dizifilms Inc.	ISART Digital Montreal Inc.	Montréal Photography Productions	Rosemonde Communications	Troublemakers
BUF	DLR Storyboard Artist	Isuma Productions Inc.	MPC	Ruth Arseneault	UNLTD
Brome Lake Film Commission	Dossier Media	Item 7 Inc.	Mr. X FX	Sailor Productions	City of Longueuil (Film Office)
Chaudière-Appalaches Film and Television Bureau	Double Negative Montreal Productions Ltd.	Jean Ducharme	MRC Vallée de la Gatineau	Scanline VFX	City of Montreal
Eastern Townships Film and Television Office	Ecole NAD-UQAC	Kaibou Production Inc.	Muse Entertainment Enterprises	Sécolène Gautier	Quebec City
St. Lawrence Law Firm LLP	Entreprises Ronald Gilbert, Inc.	Kim Beaudoin	Neweb Labs Inc.	SHED	Quebec City – Major Events Office
Caribara Montréal	Gilbert, Inc.	Kinemuse Productions Inc.	nGenious Studio	Sinocan Media Group	Walter Lighting & Grip Inc.
Cégep de Jonquiere (École Supérieure en ATM)	Exogène Films	L'Atelier Animation	On Animation Studios Montreal	Sisto Entertainment & Business Law Services Inc.	Xn Québec
	FICC	Laughing Dragon Studios	Outpost VFX	SLYKID Inc.	
	Film Laurentides	Lauriane Rognie	Oxford Properties Group	The Old Port Corporation	
	FLYPATT	Le Grand Costumier	Palais des Congres	Sonomar	
	FMR Costumes	Les Enfants	Olympic Park	Squeeze Studio	
	Folks VFX		Parks Canada	Starno	
	Four Seasons Montreal				



## QUEBEC FILM AND TELEVISION COUNCIL

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