

SHOOT PLAN DOCUMENT – PORTUGAL (Pre-Production + Tax Incentive Compliance)

Project Title:

Production Company:

Line Producer / Production Service Company (Portugal):

Prepared By:

Date:

1. PROJECT OVERVIEW

- **Project Type:** (Feature Film / Series / Commercial / Documentary / Music Video)
 - **Shoot Cities:** (Lisbon / Porto / Algarve / Sintra / Madeira / Others)
 - **Tentative Shoot Dates:**
 - **Estimated Total Budget:**
 - **Estimated Portugal Spend:**
 - **Tax Incentive Eligibility:** Yes / No / Under Review
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2. PRE-PRODUCTION CHECKLIST (INTERNATIONAL LEVEL – BEFORE ENTERING PORTUGAL)

2.1 Script & Creative Breakdown

- Final script locked
- Scene breakdown and page count
- Location categories identified
- Stunts / VFX / drone / special equipment needs
- Cultural or legal sensitivities highlighted
- Portuguese cultural test considerations (if claiming tax rebate)

2.2 Budgeting & Scheduling

- Detailed budget with Portugal line items
- Cost reports prepared for ICA eligibility
- Contingency allocation
- Master production schedule
- Day-by-day shoot plan
- Tech recce plan with local line producer

2.3 Legal & Administrative

- Company registration / fiscal representation (if required)
- General liability insurance
- Equipment & production insurance
- Risk management plan
- International contracts reviewed (crew, cast, vendors)
- Work permits (if applicable for non-EU crew)

- EORI number / ATA Carnet preparations for gear entry
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3. PORTUGAL TAX INCENTIVE PREPARATION (ICA CASH REBATE 25–30%)

3.1 Eligibility Assessment

- Project qualifies under cultural test
- Meets minimum eligible spend:
 - **€500,000** – fiction/animation
 - **€250,000** – documentary
- Portugal spend ratio confirmed
- Above-the-line and non-eligible costs separated

3.2 Application Documents Checklist

Mandatory documents for tax incentive application:

- Script (English or Portuguese version)
- Production budget with Portugal breakdown
- Finance plan
- Production schedule
- Shooting plan
- Company registration + legal documents
- Producer's statement

- Service contract with Portuguese line producer
- Cultural test self-evaluation
- Proof of secured financing (LOIs, agreements)
- Insurance documents

3.3 Local Partner Responsibilities (Portuguese Line Producer)

- Submit application to **ICA – Instituto do Cinema e Audiovisual**
- Maintain communication with ICA
- Ensure compliance with cultural test
- Track eligible spend categories
- Maintain cost reports for rebate claim
- Gather local invoices as per ICA standards
- Monitor rebate payment timeline

3.4 Timeline for Application

Stage	Responsibility	Estimated Duration
Eligibility evaluation	Producer + Line Producer	1–2 weeks
Documents preparation	Production team	2–4 weeks

ICA submission	Portuguese partner	Immediate
ICA approval window	ICA	~20 business days
Start of production	After conditional approval	—

4. PERMITS & REGULATORY CLEARANCES

4.1 Location Permits

Handled by local production company:

- Municipal permits (Lisbon Câmara, Porto Câmara)
- Heritage site permits (DGPC)
- Private property agreements
- Beach & marine film permissions
- Night shoot approvals
- Street closures & police coordination

4.2 Drone Filming

- ANAC approval
- Civil aviation safety documentation
- Licensed Portuguese drone operator required

4.3 Stunts / SFX / Large Setups

- Fire safety clearance
- Crowd management permissions
- Special insurance cover

4.4 Child Actor Compliance

- Portuguese labor regulations
- Guardian consent forms
- Dedicated welfare supervisor

5. LOGISTICS & GROUND PREPARATION (BEFORE ARRIVAL)

5.1 Travel & Accommodation

- International inbound flight bookings
- Crew manifests
- Hotel rooming list
- Long-stay negotiation for Lisbon / Porto
- Local transport plan: vans, tech trucks, runners

5.2 Equipment Transport

- ATA Carnet for all gear
- Coordination with customs broker
- Local rental confirmations (ARRI / RED / grip equipment)
- Backup gear availability
- Warehouse storage arrangements

5.3 Crew Hiring (Portugal + International Integration)

- Preliminary Portuguese crew shortlist:
 - Gaffers
 - Grips
 - AD team
 - Makeup / Hair
 - Stylist
 - Art team
- CVs reviewed and approved
- Contracts issued in advance
- Local production coordinator appointed

5.4 Health & Safety

- Risk assessment reports
- COVID / medical preparedness
- On-set medic booked

- Safety officer assigned for stunts / special rigs
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6. LOCATION INTELLIGENCE & RECCE PLANNING

6.1 Pre-Recce Deliverables

- Photo references
- Video walks
- Sun path charts
- Noise & traffic analysis
- Accessibility checks
- Weather history for chosen dates

6.2 Tech Recce Plan (On-Ground)

- Director + DP + Line Producer walkthrough
 - Equipment placement diagrams
 - Crew movement mapping
 - Basecamp identification
 - Public access routing
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7. DOCUMENTATION TO PREPARE BEFORE DEPARTURE

7.1 Production Documents

- Call sheet templates
- Movement orders
- Safety briefings
- Vendor list
- Emergency contact sheet
- Local fixers & coordinators contact list

7.2 Financial Documentation

- Advance float request
- Per diem allocation list
- Accounting templates compliant with ICA
- Cost control tracker

7.3 Legal Documents

- Contracts (talent, crew, vendors)
- Location release forms
- NDA agreements
- Insurance policy PDFs

- Risk assessment documentation
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8. COMMUNICATION FRAMEWORK

8.1 Daily Reporting

- Daily production report (DPR)
- Expense logs
- Location status updates
- Crew availability updates

8.2 Internal Communication Channels

- WhatsApp group for core team
 - Email reporting structure
 - Designated escalation manager
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9. FINAL PRE-DEPARTURE CHECKLIST

TO BE CONFIRMED 7 DAYS BEFORE TRAVEL

- All Portugal permits approved
- Conditional ICA tax incentive approval secured
- Hotels and transport paid & confirmed
- Carnet issued
- Local crew booked and contracts signed
- Equipment lists final
- Call sheets for first 3 days prepared
- Insurance documentation printed
- Rebate compliance folder created
- Recce schedule locked

TO BE CONFIRMED 48 HOURS BEFORE TRAVEL

- Travel itineraries shared
 - Weather check for shoot days
 - Local SIM cards arranged
 - Pickup schedules circulated
 - Backup plans for weather or location delays
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10. PROJECT READINESS SIGN-OFF

Department	Status	Sign-off
Production Management	<input type="checkbox"/> Complete	
Legal & Accounting	<input type="checkbox"/> Complete	
Portugal Line Producer	<input type="checkbox"/> Complete	
Creative Team	<input type="checkbox"/> Approved	
Logistics	<input type="checkbox"/> Approved	
Tax Incentive Compliance	<input type="checkbox"/> Verified	

APPENDICES

- A. Sample Cultural Test (Portugal ICA)
 - B. Eligible vs Non-Eligible Tax Rebate Expenses
 - C. Municipal Permit Contacts (Lisbon, Porto, Cascais, Sintra)
 - D. Standard Portuguese Crew Rates Sheet (if needed)
 - E. Recommended Rental Houses & Studios in Portugal
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