



AUSTRALIAN AUDIOVISUAL INDUSTRY BACKGROUND

- 1. 'GETTING TO KNOW YOU BETTER'**
- 2. 'WHAT WORKS AND WHERE'**

**Address by Carole Sklan – Director of Film Development
Australian Film Commission**

Exploring Screen Production in
Canada – Australia – New Zealand

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1. Australian Audiovisual Industry Overview

AUSTRALIA AT A GLANCE

<i>Population</i>	19.4 million
<i>Television channels</i>	Commercial free-to-air – Seven, Nine, Ten Public broadcasting free-to-air – ABC, SBS Pay TV carriers – Foxtel, Optus Vision, Austar (total of about 50 channels)
<i>Cinemas</i>	Annual box office gross – about A\$700m (US\$390m) Admissions – nearly 90 million from about 250 release Screens – 1,817 screens at 544 theatres as of December 30, 2000 Australian share of box office – 5–10%
<i>Local TV drama output</i>	650–800 hours of drama per year worth A\$180–240m (US\$100–135m)
<i>Local feature output</i>	25 to 40 per year worth A\$80–165m (US\$45–90m)
<i>Foreign production</i>	10–20 features and TV programs annually, worth A\$130–350m (US\$70–190) spending A\$110–190m in Australia.
<i>Co-production</i>	4–8 features and TV programs annually, worth A\$40–190m (US\$20–105m)

For a country with population of roughly 20 million we have:

- **Television channels:** Five free-to-air television channels – three commercial and two public – and a pay TV system which has three principal carriers and about 50 channels – although this is likely to change with a proposed merger of the two major players Foxtel and Optus.
- **Cinemas:** There are about 1,800 screens and about 250 releases a year. Last year they grossed A\$812m thanks to nearly over 90 million admissions. (Our exchange rate, very roughly, is 2:1 so that's about US\$400m but amounts in this document are in Australian dollars). Up until the year 2000 there had been 12 consecutive years of audience growth with a slight decrease in that year.
- **Local television drama output:** The local television industry produces 650–800 hours of drama per year worth \$180–\$240m.
- **Local feature film output:** Australia produces 25 to 40 local feature films a year, many of which are self-funded and under \$1m, few of which are over \$6m.
- **Audiences for local product:** The TV rating charts are always dominated by local shows – sadly not always drama – but it's a different story in cinemas where US films overshadow all else. The local annual box office share reached a high of 10 per cent in the 1990s but has never fallen below 3 per cent. For the past two years it was 8 per cent.
- **Foreign production:** There has been an increase in high profile productions including the *Star Wars* prequels and *The Matrix* trilogy – we average 10 to 20 features and television productions annually, currently worth A\$130–350m and spending A\$110–190m in Australia. (See section 5)
- **Sales agents/international distributors:** The two biggest names are Southern Star and Beyond.
- **Co-productions:** 4–8 features and TV programs annually, worth A\$40–190m (US\$20–105m)

2. Australian Production Activity

PRODUCTION ACTIVITY IN 2000/01

	Australian productions: No. (Value in A\$m)	Co-productions: No. (Value in A\$m)	Foreign productions: No. (Value in A\$m)	Total productions: No. (Value in A\$m)
FEATURES (total local spend A\$208m)	26 (\$82m)	3 (\$82m)	5 (\$204m)	34 (\$368m)
TV DRAMA (total local spend A\$391m)	41 (\$237m)	5 (\$110m)	16 (\$145m)	62 (\$493m)
Children's drama (total hours 133)	12 (\$79m)	1 (\$9m)	Nil	13 (\$88m)
Series/serials (total hours 691)	20 (\$125m)	3 (\$94m)	1 (\$2m)	24 (\$220m)
Mini-series (total hours 18)	2 (\$14m)	1 (\$7m)	1 (\$20m)	4 (\$41m)
Telemovies (total hours 34)	7 (\$20m)	Nil	14 (\$125m)	21 (\$144m)

Source: Australian Film Commission

COMMERCIAL TV PROGRAM EXPENDITURE IN 1999/00

AUSTRALIAN PROGRAMMING

Program type	amount (A\$m)	% of total
Sport	187.3	21.7
News and current affairs	153.2	17.7
Drama – adult	91	10.5
Light entertainment – other	71.2	8.2
Light entertainment – variety	48.6	5.6
Drama – children's	11.9	1.4
Children's – other	7.2	0.8
Documentaries	3.4	0.4
Other programming	22.6	2.6
Total Australian	596.6	69.1
OVERSEAS PROGRAMMING		
Overseas – drama	250.7	29
Overseas – other	16.5	1.9
Total Overseas	267.3	30.9
TOTAL PROGRAMMING	863.9	100

Source: Australian Broadcasting Authority

3. Government Financial Support

AUSTRALIAN FEDERAL GOVERNMENT AGENCIES

Australian Film Commission (AFC)

The primary objective of the AFC is to provide development funding for the film and television industry. This predominantly takes the form of carefully targeted assistance for projects and people but a limited amount for funding exists for broader industry development programs. The organisation also facilitates international co-productions. Secondary functions include the cultivation of audiences, the promotion of Australia's screen output and the collection and analysis of data about the industry.

Australian Film Finance Corporation (FFC)

The FFC is the principal agency for investing in Australian production. In 2000/01 it invested 50–60 per cent of its budget in features, 30–40 per cent in television drama, and 12–15 per cent in documentaries. It will not fully finance and will only invest in collaboration with private investors and with the participation of the marketplace. This marketplace attachment might be in the form of a distribution guarantee from a local film distributor, a local TV licence fee, or pre-sales against overseas territories.

Australian Film, Television & Radio School (AFTRS)

AFTRS is a national centre of excellence in professional education and training for the Australian film, broadcasting and new media industries.

Film Australia

Film Australia is one of the nation's largest producers of television documentaries and educational programs. Its core function is to devise, produce and distribute programs dealing with matters of national interest or designed to illustrate or interpret aspects of Australian life. This is done via a contract with the Government for programs made in the "National Interest Program".

SBS Independent (SBSI)

SBSI commissions factual and fictional programming from independent Australian producers which helps its parent public broadcaster SBS to meet its responsibility of reflecting Australians' diversity. Its programs are designed for audiences who are not served by the mainstream, for example, those of a multi-cultural background or with broader interests.

Australian Children's Television Foundation (ACTF)

This independent organisation encourages the development, production and dissemination of television programs, films and other audiovisual media for children.

ScreenSound Australia

Formerly the National Film and Sound Archive, ScreenSound Australia acquires, preserves and provides access to a collection of film, television, video, radio and recorded sound materials. It aims to increase the knowledge and appreciation of Australia's screen and sound heritage.

The Australian production community has had bi-partisan support for film and television subsidies since they were introduced in the early 1970s. The current emphasis is on direct arms-length support but the system has been more tax-based.

The Federal Government pot for the current financial year holds A\$113m (US\$62m) which will increase to \$131m (US\$72m) next financial year. The production industry received a boost last year with a significant increase in funds mainly directed at production and development.

AUSTRALIAN PUBLIC SUBSIDIES (FEDERAL ONLY)

Organisation	2001/02 amount (A\$m)	2002/03 amount (A\$m)
Australian Film Finance Corporation (FFC)	50.0	57.5
ScreenSound Australia	19.4	19.0
Australian Film, Television & Radio School (AFTRS)	14.1	15.6
Australian Film Commission (AFC)	16.2	19.9
Film Australia	6.9	9.8
SBS Independent (SBSI)	4.9	6.9
Australian Children's Television Foundation (ACTF)	2.4	2.4
Public Broadcasters	2000/01 amount (A\$m)	
Australian Broadcasting Corporation (ABC)	621	
Special Broadcasting Service (SBS)	116	

Note: The ABC and SBS both include radio, television and internet services. The total for SBS includes the \$4.6m which SBSI received in 2000/01.

Source: Australian Film Commission

STATE AGENCIES – GOVERNMENT APPROPRIATIONS (A\$m)

	1997/98	1998/99	1999/00	2000/01
NSWFTO	4.79	4.88	5.18	5.82
Film Victoria & Digital Media Fund*	9.83	5.89	5.47	6.31
PFTC	7.17	8.35	9.72	5.4
Screen West	0.98	0.9	1.83	3.7
SAFC	3.11	5.48	4.65	4.08
Screen Tasmania		0.01	0.32	1.35
Arts Tasmania	0.08	0.29	0.05	0.01

* not including Cinemedia

OTHER SUPPORT – LOCAL INVESTMENT INCENTIVES

As well as providing direct support for the industry, the Federal Government encourages private investment through tax incentives under 10BA and 10B of the *Income Tax Assessment Act 1936*.

Division 10BA

Division 10BA aims to provide support for equity investment in Australian film and television projects via accelerated tax write-offs. To be eligible, a project must be certified by the Department of Communications and the Arts (DCITA) as a qualifying Australian film. Australian resident investors and corporations who are owners of first copyright of a film may deduct 100 per cent of the capital cost of the qualifying film against their active income in the financial year the investment is made. The project needs to be completed and first used for exploitation within two years from the end of the financial year in which the investment was made. It is important to note that, unlike the UK, there is no limit imposed on a qualifying project's budget for the investors to utilise the full 100 per cent write off in the first year. Projects certified as 10BA compliant are also eligible to apply for direct investment from the Federal Government funding body, the Australian Film Finance Corporation (FFC).

Division 10B

Division 10B also provides support via accelerated tax write-offs for equity investment in film and television projects that are assessed as wholly or substantially made in Australia and allows

a wider range of projects to qualify than that provided for under 10BA. However, investors must write off the capital costs over two years, beginning in the financial year in which the project is first exploited or used for income producing purposes. There is no limit imposed on a qualifying project's budget for the investors to utilise the full tax write-offs over the two applicable years. Projects certified under the provisions of Division 10B are not eligible to apply for funding from the FFC, unlike 10BA certified projects.

There are six State Government agencies that support the activities of their local industries and keep a keen eye on attracting offshore production. They spent a total of \$27m on film and TV in 1999/2000.

4. Content Rules

AUSTRALIAN CONTENT STANDARD IN BRIEF

The Australian Content Standard is in two parts.

- 1) A transmission quota stipulates that 55 per cent of everything screened between 6am and midnight must be Australian. This works out to about 10 hours a day of any sort of programming.
- 2) The minimum annual quotas for specific types of Australian programming are as follows:
 - 225 points must be earned from first release drama broadcast between 5pm and 11pm (775 points over a three-year period), which equates to 80–258 hours depending on drama type;
 - 20 hours of first release documentary;
 - 130 hours of first release children's programs, to include 32 hours of first release Australian drama shown within certain time frames;
 - 130 hours of preschool programs, including repeats.

Direct subsidy is the core mechanism that supports Australian production. But, in television, this is underpinned by the indirect mechanism of a local quota – the Australian Content Standard. This only applies to the three commercial free-to-air channels.

The regulation is audience focused. Its objective is to create television that develops and reflects a sense of Australian identity, character and cultural diversity.

The networks have to accumulate a certain number of points to meet the adult drama quota. This point system is about Australian production elements and creative control, not look and feel. It is also budget-based and therefore biased towards the higher budget end of the market. The hard reality, however, is that the networks principally meet the quota by screening series and serials – long-running fast turnaround shows at the lower end of the budget scale. The whole system is designed to ensure a certain number of hours up on the screen but it's not many hours. In drama it might be anything from 80 to 258 hours in an entire year. It is rare that the networks would run much more than is required.

There has been nothing in the rules to ensure there is diversity of budget, content or style within each of the three regulated genres, however, the Standard is currently being reviewed by the Australian Broadcasting Authority and the new draft proposes incentives to address these issues.

Australian content on pay TV is also regulated, but quite differently. It is based on revenues and only applies to drama. As it stands now, predominantly drama channels have to spend 10 per cent

of their programming budget on Australian drama content. The industry is lobbying hard to regulate documentary channels and this is currently on the Government's agenda.

Our drama and documentary subsidies are inevitably stretched and the commitment from the commercial broadcasters is set to meet regulatory requirements. The only way to green light drama is virtually always deficit financing. The whole system is finely tuned and, given the low level of production, a change in one part can have significant ramifications.

Under these circumstances it is impossible to overlook the objective that underpins both the regulatory and financial support: that is seeing our own faces on the big and small screen. The content quotas are conservative in terms of how many hours get on the screen and wholly local production has to be preserved. In this context it is right and proper that there is debate about what constitutes Australian production.

5. Foreign Production

The steady growth in foreign production is important to the overall health of our industry.

Until the mid-1990s, foreign production in Australia was subsidiary to the area of local production. While it may have been an important source of work for some crew, facilities or post-production businesses, in terms of the overall economics of the Australian film and television industry, foreign production was of marginal interest. State Governments developed regional incentive packages but at a federal level, funding and policy were entirely directed towards the development of the local industry.

However, as the Australian dollar dropped and as Australia consolidated its reputation internationally as a nation that produced world-class films and filmmakers, interest in Australia as a destination for foreign production began to grow. And as the total value of foreign production grew, the impact on our crews and our infrastructure became increasingly apparent and issues surrounding funding and policy became more significant.

The role of foreign production in Australia has been controversial and surrounded by conflicting claims and arguments. The advent of large studios, particularly Fox in Sydney, designed to cater for big-budget overseas productions, has heightened debate on the impact of such productions. Those in favour of increasing levels of foreign production point to the economic benefits for the nation as a whole and the employment opportunities arising in production and associated roles. The detractors fear that overseas production could eventually dominate the local industry even to the extent that support for our local creative talent wanes and we become mainly an adjunct to the mainstream US industry.

The fundamental connection between the development of an industry which has the capacity to produce Australian film and television and the potential to grow the level of foreign production is the fact that attracting foreign production requires above all a sophisticated domestic industry: ongoing levels of foreign production can only be sustained where indigenous film industries have reached a high level of sophistication and capability.

In Australia, State Governments and more recently the Federal Government, have put policies in place to attract further foreign production in recognition of the potential economic benefits. Tax incentives, promotional support and studio and infrastructure development have been key policy levers. The new Federal tax rebate scheme available to offshore production companies already appears to be attracting more high-budget films and mini-series to Australia.

GOVERNMENT INCENTIVE SCHEMES FOR FOREIGN PRODUCTION

States and territories

A number of States provide payroll tax rebate and other location-based incentive schemes.

New South Wales

In NSW, the Film & Television Industry Attraction Fund (FATIAF) is based on a rebate on payroll tax but also takes into consideration the amount spent in NSW, as well as other investments made, such as in new technology development. To be eligible there must be a minimum spend of A\$5 million in NSW or a post-production minimum spend of A\$3 million. The rebate is made available after production is completed in NSW and audited figures have been submitted. A payroll tax rebate scheme also operates at Fox Studios, Sydney.

Queensland

Queensland offers a payroll tax rebate (minimum Queensland spend of A\$3.5 million for a single project or A\$5 million for the bundling of two projects made within four years); a cast and crew salary rebate (equates to 8–10 per cent of weekly wage) for productions with a minimum Queensland spend of A\$100,000 that employ Queensland-based cast and crew; a 'traffic and fire services' rebate, and an internship scheme.

Victoria

Victoria offers two incentive funds to encourage producers to locate film and television projects in the state, both administered through the Melbourne Film Office. Two million dollars a year is allocated for the Production Investment Attraction Fund for projects that will spend 70 per cent of their budget, or a minimum of A\$3.5 million, in Victoria, or use three or more post-production facilities in the state (post only). Through the Regional Victoria Film Location Assistance Fund \$500,000 per year is also available for projects shooting in regional Victoria; the fund will contribute to regional accommodation, regional living and relocation costs.

South Australia

South Australia offers a payroll tax exemption on qualifying feature films (worth approximately 6 per cent on crew wages). Only feature films are eligible and are required to demonstrate that the production will involve the employment of South Australian residents and result in economic benefits to South Australia. Exemptions are subject to approval by the Treasurer. The South Australian Film Corporation provides assistance to producers at all stage of application.

Western Australia

Western Australia also offers a payroll tax incentive through the film agency ScreenWest. Payroll tax is only payable in Western Australia when the payroll exceeds a threshold of \$675,000. Beyond this, it is calculated on a sliding scale from 3.65 per cent to 6 per cent.

FEDERAL TAX INCENTIVES FOR FILM INVESTMENT

The Federal Government has introduced a refundable tax offset for film production that provides another financial incentive for the producers of large budget films to locate in Australia.

12.5 per cent Federal Tax Rebate

The 12.5 per cent refundable tax offset may represent between a 9 per cent and 12.5 per cent cash subsidy on the total budget depending on the extent to which a production shoots and spends money in Australia.

The cash rebate is calculated as 12.5 per cent of a production's *Qualifying Australian Expenditure* (QAE) which is defined as production expenditure reasonably attributable to goods, services and property provided/used in Australia.

In order for a production to qualify for the rebate, it must spend at least A\$15million (approx. US\$7.5m) on QAE. Further to this minimum requirement there will be two categories of eligibility:

- if the value of QAE is between A\$15m to A\$50million, this will be required to represent a minimum of 70 per cent of the *Total Production Expenditure* to qualify; or
- if the value of QAE is greater than A\$50million, the production will qualify regardless of the percentage it represents against *Total Production Expenditure*.

The definition of *Total Production Expenditure* provides the base against which the 70 per cent activity test will be assessed where QAE is between A\$15m and A\$50m. There are a number of costs that are excluded from the total budget for the purposes of calculating this activity test: financing; development; copyright acquisition; general business overheads; publicity and promotion; and fee deferments.

Each of these items are further defined in the legislation, but if any of items 2–5 are incurred in Australia the costs may be factored back into the *Total Production Costs*. The production may also nominate one person whose remuneration is to be disregarded if it advantages the percentage calculation.

The application for the rebate must be made by an Australian resident company or a foreign entity with a permanent establishment in Australia and an Australian Business Number (ABN) and will be paid directly to the applicant. The application is submitted with a tax return in the year that the film is completed. A provisional certificate may be obtained from the Minister of the Arts (DCITA).

All expenditure should be arranged by the single entity claiming the tax offset.

A company is not entitled to a tax offset if a provisional or final certificate for the film has been issued under 10BA (whether or not the certificate is still in force).

Projects that access the tax privileged benefits of Division 10BA and Division 10B, cannot also access the 12.5 per cent federal cash rebate outlined above.

Even before the new Federal tax incentive was introduced, the growth of foreign production was outstripping that of local production: in the last five years spending in Australia by foreign projects increased by 139 per cent, while local production spending increased a mere 6 per cent. If the growth rates of the two sectors remain too out of kilter, it may weaken the local industry and also make it difficult to service the needs of foreign production.

In June of this year the AFC published a report called 'Foreign Film and Television Drama Production in Australia'. It can be downloaded free from the AFC website. The report explored the reasons why foreign productions come to Australia and investigated the perceptions of crew capacity and depth around Australia. The research is largely based on a survey of Australian crew with experience on foreign drama productions, as well as interviews with Los Angeles based

producers who have filmed in Australia. The survey asked about the experience of Australian crews on foreign productions, and in particular the role of foreign productions in their professional development.

With stronger growth in the foreign production sector likely, careful management is needed to reap the economic benefits without jeopardising the cultural benefits Australians derive from the Australian industry. The AFC favours a healthy mix of various kinds of production activity. Our research report illuminates the complex, sometimes competing, but ultimately synergistic and mutually beneficial relationship between domestic film and television production and offshore production.

6. Co-productions

Despite Australia's geographical isolation, for the past 20 years our producers have been very outward looking in terms of financing and selling product abroad – they've had to be. A core part of what they do is raise money via distribution guarantees, television pre-sales, or as private equity investment – and they have successfully grown that investment.

Foreign investors contributed 40 per cent of the total budget of Australian TV drama made last financial year and 66 per cent to the feature slate, although this figure usually varies significantly.

The international co-financing and co-production of larger budget production continues to grow, although only a small slice is official co-productions.

The nature of the agreements

Australia has had an official co-production program since signing with France in 1986. Nine treaty agreements or memorandums of understanding now exist.

Official co-productions must be initiated, developed or scripted by nationals or residents of Australia, or the co-producing country. There must be a co-producer from each country, and the Australian producer must retain a share of copyright. The cast and crew must be nationals or residents of each country, although a limited number of performers from other countries may be engaged.

The agreements vary from country to country, including what genres qualify. In Italy, for example, all television is excluded. The lowest permissible level of Australian creative participation is 20 per cent and that's in Israel and Ireland. In Canada it's 30 per cent and in France it's 40 per cent. The aim is for balance across each agreement over time.

The proportion of Australian participation is judged by a points system. An individual project is scored according to certain Australian key crew and lead actors. Once there is a final tally, at least that percentage of the budget must be spent in Australia, and there must be at least that proportion of Australians in the entire cast and crew. It must also be commensurate with the budget contribution of the Australian producer.

What underpins the program is that once a project has qualified it is classified as national to both countries and is eligible for all the benefits. In Australia it may become more attractive to the networks because it can help fill their local content quotas, and it also becomes eligible for funding from the FFC, although the FFC will exercise its own judgement. It will only fund the cost of the Australian elements and, importantly, will only invest where the director or writer is Australian, and where an Australian actor fills at least one major role. The total amount spent on co-productions is capped at 10 per cent of the FFC's total annual expenditure.

Australian investors can also get a tax deduction under 10BA if they invest in official co-productions, which still have to have "significant Australian content".

Statistics

To date, a total of 67 official co-productions have been produced. Of these, 25 were features, 17 were miniseries and 13 were drama series. There have also been documentaries and telemovies, but less than 10 of each. Titles include *Greencard*, *Black Robe*, *Map Of The Human Heart*, *Kings In Grass Castles*, *Moby Dick* and *Beastmaster*.

While numbers of co-productions in recent years are staying much the same, their value is rising. This is partly because a number of long-running television series are now part of the co-production slate.

AUSTRALIA'S CO-PRODUCTION TREATIES

Country	Nature of agreement	Date signed	No of completed productions
France	MOU	1986	17
Germany	Treaty	2001	2
UK	Treaty	1990	21
Canada	Treaty	1990	20
NZ	MOU	1990	7
Italy	Treaty	1993	1
Vietnam	MOU	1996	0
Israel	Treaty	1997	0
Ireland	Treaty	1998	2

Source: Australian Film Commission.

A new interest in television arose with the Australian Content Standard being changed in 1996 to allow series and serials that are official co-productions to qualify for quota points. The FFC is not permitted to fund this type of television. However, the FFC has contributed about 30 per cent of all the Australian investment that has gone into official co-productions over time.

Our most regular partners have been the UK, France and Canada – from 17 to 21 each although this includes a couple of three-way productions. The total value of these productions, with each of these countries, has been A\$130 to A\$200m.

The total number of TV dramas and features that went into production last financial year was 100. Only eight of those productions were co-productions. On the basis of value, however, co-productions were worth about 20.5 per cent of the total, or nearly 38 per cent if you exclude foreign production.

In other words, those eight co-productions were worth one-third of the 67 wholly Australian productions, so they are significant within the overall slate judged by value. But the figures also underline the extra costs of these projects.

COMPLETED OFFICIAL CO-PRODUCTIONS

Australia/Canada		Australia/New Zealand	
Title	Production Companies	Title	Production Companies
Features			
<i>Black Robe</i>	Samson Productions Pty Ltd, Alliance Entertainment Corporation	<i>Alex</i>	Total Film and Television Pty Ltd; Isambard Productions
<i>Map Of The Human Heart</i>	Working Title Films Ltd, Vincent Ward Film Productions Pty Ltd, Les Films Ariane, Sunrise Films Ltd (Canadian/UK)	<i>Cops and Robbers</i>	Total Film and Television Pty Ltd; Isambard Productions
<i>On My Own</i>	Colosimo Films Pty Ltd, Alliance Entertainment (Canada/Italy)	<i>Secrets</i>	Victorian International Pictures Pty Ltd; Avalon Studios Production
<i>Turning April</i>	Total Film & Television Entertainment Corporation, Alliance Productions Pty Ltd	<i>The Navigator: A Medieval Odyssey</i>	Arena Film
<i>Sally Marshall Is Not An Alien</i>	Infinity Pictures Inc, Cinar Production Inc		
Mini-series			
<i>Golden Fiddles</i>	South Australian Film Corporation, Wacko Entertainment Corporation	<i>Deepwater Haven</i>	Beyond International Group; F Productions; South Pacific Pictures
		<i>Mirror Mirror</i>	Millenium Pictures Pty Ltd; Gibson Group Ltd
		<i>Mirror Mirror II</i>	Millenium Pictures Pty Ltd; Gibson Group Ltd
Drama Series			
<i>Beastmaster I to III</i>	Coote/Hayes, Alliance/Dar II Productions/Dar III Productions		
<i>Saddle Club 1 and 2</i>	Crawfords Australia, Protocol Entertainment		
<i>Sir Arthur Conan Doyle's Lost World 1 and 2</i>	Coote/Hayes, 3495493 Canada Inc, 3703118 Canada Inc		
<i>Yakkity Yak</i>	Kapow Pictures Pty Ltd, Studio B Productions		
Animation			
<i>Dumb Bunnies</i>	Yoram Gross Ltd, Village Roadshow, Nelvana Ltd		
<i>Quads 1 and 2</i>	Media World Features Pty Ltd, Nelvana Ltd, Protocol Entertainment		

Telemovies	
<i>Dr Jekyll & Mr Hyde</i>	Coote/Hayes Holdings, Telescene Film Group
<i>Sir Arthur Conan Doyle's Lost World</i>	Village Roadshow Pictures Television, Telescene Film Group
Documentaries	
<i>How to Make Love Like a Frog</i>	Artemis International Pty Ltd, Westwind Pictures 591775 Saskatchewan Ltd
<i>Leonard Cohen: Gift of a Golden Voice</i>	Robert de Young, trading as Lowlads Media, Cine Qua Nou Films
TV Series	
<i>Emma</i>	Crawford Productions Pty Ltd, Original Pictures Inc
<i>Guinevere Jones</i>	Crawfords Australia, Original Pictures Inc

Our official co-production program was reviewed in 2000 – as part of usual policy processes. The review found that the program delivers net economic benefits to the Australian film and television industry and should continue.

Some producers interviewed for the review had hoped to access the program more often, particularly to gain access to Europe. On the other hand, they acknowledged it is often a last resort. They prefer trying other financing options first, because of the increased costs and complexities involved in co-productions. Many projects also have unsuitable content.

Initially the program aimed to encourage creative and technical collaboration with overseas filmmakers and distribution interests, and gain access to new markets and improve returns. It has evolved into a way of financing a broader range of bigger budget productions.

The investment and expenditure levels for Australia and its partner nations have been remarkably similar over time, although Australia's creative participation outweighs those of other countries.

There have been concerns, however, centred on two Australian/Canadian co-productions *Beastmaster* and *Sir Arthur Conan Doyle's The Lost World* – the third series of which did not receive official co-production status. Coote Hayes is the production company in both cases partnered with Alliance in the case of *Beastmaster* and Telescene in the case of *Lost World*.

The issue is not about direct subsidy – neither have, could have or needed to access Australian public money. Despite being Australian majority co-productions and predominantly cast and crewed with Australians, these programs are primarily aimed at the US and international market and the number of hours has sparked debate about the lack of any cultural resonance for Australian audiences – and whether that matters.

The primary concern is the risk of shows like this potentially displacing legitimate Australian shows. However, there is no doubt that productions like these create considerable employment, and provide a considerable post production spend. Ironically, co-production status was of no benefit in Australia but was required by the Canadian producer in order to access tax benefits. They argued that the projects probably would not have come to Australia without official status.

Co-Production Impediments

From Australia's point of view, a key limitation to making official co-productions is the minimal levels of higher budget film or television production, juxtaposed against the preference of our broadcasters and our audiences for local stories.

Last financial year, 21 of our 26 Australian films cost less than A\$6m, or US\$3m. In the previous year there was only one over A\$6m but it is consistently difficult to fund anything over A\$6m.

The average production cost per hour of Australian series television has been falling for the past four years and is now at A\$195,000 – the average cost per hour of series co-productions is A\$1.8m. Local broadcasters have held down license fees on local production and only make limited equity investment available. Deficit funding is increasingly risky given the present international climate.

Producers have had to pare down budgets as a result. It's a difficult climate in which to get high budget wholly Australian drama financed. There's just not much leeway for the extra costs of co-productions.

Linked to this cost question is the approach of the TV networks. While they have to meet drama quotas and official co-productions automatically qualify, they don't just need Australian programming, they need programming that rates in primetime. They are reluctant to get involved in complex co-productions and share control with a foreign producer and a foreign broadcaster half way around the world.

The bulk of the content quota is being met through series and serials. By their very nature they are at the low budget end of the spectrum and are very rooted in every day life – hospitals, police stations, local community centres. With a few exceptions, it is the very specifically Australian programming that rates. What happens here is no different to what occurs in other countries. This type of programming doesn't easily fit the official co-production mould.

Networks are extremely cautious about taking the greater risk of supporting higher budget material such as mini-series and telemovies, which cost them more. The opportunities for producers to pitch suitable ideas for wholly Australian production are very limited, for co-productions more so.

Our public broadcasters would in some ways be more suitable co-production partners but both of them are under extreme budget pressure. SBS has always been a very lean operation and the ABC has suffered over the years with budget cuts, impacting on local production. However, with a new managing director and a recent budget increase the ABC may be in a position to refocus on their local programming plans.

In summary there is no doubt that co-productions can provide a way of financing bigger budget material. But the restrictions on our own sources of finance, both in how much is available and what it's available for, does mean that co-productions are often a last resort.

7. Performance of Australian Film and Television in Australia

Last calendar year was a good one for us in terms of how well our features did locally – the box office share for local films was 8 per cent, which was the same as the year before and about as good as it got throughout the 1990s.

Australian films earned \$63.5 million – an excellent result given the substantial overall increase in box office figures. This result for Australian films was the highest total ever in dollar terms.

The 2001 result was the fifth highest share for Australian films since 1990. It was the 12th highest result since data collection started in 1977.

AUSTRALIAN FILMS' SHARE AT THE BOX OFFICE 1991–2001

Year	Total Gross	% share
1991	19.1	6
1992	29.7	9
1993	24.7	6
1994	46.6	10
1995	19.8	4
1996	43.7	8
1997	28.4	5
1998	25.6	4
1999	21.1	3
2000	54.2	7.9
2001	63.4	7.8

Source: MPDAA and AFC Policy Research and Information

THE TOP GROSSING AUSTRALIAN FILMS FOR 2001

Film	Release Date	Distributor	Box Office
1 <i>Moulin Rouge</i>	24-May-01	Fox	\$27,431,931
2 <i>Lantana</i>	04-Oct-01	Palace	\$9,883,101
3 <i>The Man Who Sued God</i>	25-Oct-01	BVI	\$8,108,300
4 <i>Crocodile Dundee in Los Angeles (Aus/US)</i>	12-Apr-01	UIP/Universal	\$7,759,103
5 <i>The Bank</i>	06-Sept-01	Footprint Films	\$2,451,648

Source: MPDAA at 31/12/2001

But while there has been sustained successes at the Australian box office, Australian film continues to be dwarfed by the US film industry. Like most countries the Australian film market is dominated by big budget US studio films that run vigorous and well-resourced marketing campaigns. The strategy of 'front loading' a film – where heavily marketed films are given a wide distribution in the first days to capitalise on extensive media campaigns – ensured Hollywood's supremacy at the box office in 2001 with 'event' films like *Lara Croft: Tomb Raider*, *Pearl Harbour* and *Planet of the Apes*.

TOP 10 FILMS IN AUSTRALIA IN 2001

Film (nationality)	Distributor	Gross A\$
<i>Shrek</i> (US)	UIP/Universal	\$32.0m
<i>Harry Potter and the Philosopher's Stone</i> (UK/US)	Warner Bros	\$31.3m
<i>Moulin Rouge</i> (Aus)	Fox	\$27.4m
<i>What Women Want</i> (US)	Roadshow	\$22.5m
<i>Bridget Jones's Diary</i> (UK)	UIP/Universal	\$22.4m
<i>Castaway</i> (US)	UIP/Universal	\$20.4m
<i>Miss Congeniality</i> (US)	Roadshow	\$20.0m
<i>Pearl Harbour</i> (US)	BVI	\$18.8m
<i>The Mummy Returns</i> (US)	UIP/Universal	\$18.2m
<i>Cats and Dogs</i> (US)	Roadshow	\$16.6m

Source: Motion Picture Distributors Association of Australia

The top ten films watched by Australians grossed an average \$23.3 million. *Shrek*, finished on top with \$31.5 million.

The average negative costs (budget) of US studio films was US\$54.8 million (approx. A\$107.6 million) in 2000. The average budget of Australian films released last year was A\$6 million.

In 2001 the top 50 films took 73.6 per cent of the box office (67.9 per cent in 2000). 42 of the top 50 were from the US. Of the remaining eight, four were Australian, three were British (*Harry Potter and the Philosopher's Stone* (UK/USA), *Bridget Jones's Diary*, *Chicken Run*) and one was Chinese (*Crouching Tiger, Hidden Dragon*).

The performance of Australian films vis-à-vis low budget independently produced films from other countries continues to be strong.

The 23 Australian feature films released in 2001 took an average of \$2.6 million each. The average result for the 14 UK films was \$4.2 million each an increase from last year due to the presence of *Harry Potter* and *Bridget Jones's Diary*; the 40 foreign films (non-UK/US) fetched on average \$628,381 per film. (This compares to last year's result of 18 Australian features films at an average of \$3 million each to 32 foreign films at \$700,654 per film.) The take of US films here was \$3.9 million per film.

The number one Australian film at the Australian box office is still *Crocodile Dundee* (1986), with earnings of \$47,707,045. *Crocodile Dundee* is also number two on the list of top films from any country, not just Australian films. Number one on that list is *Titanic*, which had taken \$57,633,018 at the Australian box office since its release in December 1997.

BOX OFFICE: AUSTRALIA (1966 to 11 July 2002)

Rank	Title	Distributor	Release date	Box office (\$)
1	<i>Crocodile Dundee</i>	Hoyts	1986	\$47,707,045
2	<i>Babe</i>	UIP/Universal	1995	\$36,776,544
3	<i>Moulin Rouge</i>	Fox	2001	\$27,675,530
4	<i>Crocodile Dundee II</i>	Hoyts	1988	\$24,916,805
5	<i>Strictly Ballroom</i>	Ronin	1992	\$21,760,400
6	<i>The Dish</i>	Roadshow	2000	\$17,990,148
7	<i>The Man from Snowy River</i>	Hoyts	1982	\$17,228,160
8	<i>The Adventures of Priscilla, Queen of the Desert</i>	Roadshow	1994	\$16,459,245
9	<i>Muriel's Wedding</i>	Roadshow	1994	\$15,765,571
10	<i>Young Einstein</i>	Warner Bros	1988	\$13,383,377
11	<i>Lantana</i>	Palace	2001	\$12,286,683
12	<i>Gallipoli</i>	Roadshow	1981	\$11,740,000
13	<i>The Wog Boy</i>	Fox	2000	\$11,449,599
14	<i>The Piano</i>	Miramax	1993	\$11,240,484
15	<i>Mad Max II</i>	Warner Bros	1981	\$10,845,391
16	<i>Green Card</i> (Australia/France)	Roadshow	1991	\$10,585,960
17	<i>The Castle</i>	Roadshow	1997	\$10,326,428
18	<i>Shine</i>	Ronin	1996	\$10,167,416
19	<i>Phar Lap</i>	Hoyts	1983	\$9,258,884
20	<i>The Man Who Sued God</i>	BVI	2001	\$8,397,077

Australian television drama continues to rate well in our US dominated market, with series such as *Blue Heelers*, *Water Rats*, *Seachange* and *All Saints*, consistently making the Top 20 yearly drama rating lists. In 2000 *Blue Heelers* and *Seachange* were equal fourth for the year while *All Saints* made it to number nine.

TOP TEN REGULAR TV PROGRAMS IN AUSTRALIA IN THE FIRST HALF OF 2002

Rank	Program (nationality and genre)	Network
1	<i>Nine News – Sunday</i> (Aus News)	Nine
2	<i>Friends</i> (US drama)	Nine
3	<i>Backyard Blitz</i> (Aust lifestyle)	Nine
4	<i>Big Brother Eviction</i> (Aust reality)	Ten
5	<i>Who Wants to be a Millionaire</i> (Aus Quiz)	Nine
6	<i>Hot Auctions</i> (Aust lifestyle)	Seven
7	<i>Malcolm In The Middle</i> (US Comedy)	Nine
8	<i>Room for Improvement</i> (Aust reality)	Seven
9	<i>Getaway</i> (Aust lifestyle)	Nine
10	<i>ER</i> (US drama)	Nine

Source: SMH

TOP-RATING AUSTRALIAN DRAMA SERIES AND SERIALS ON AUSTRALIAN TELEVISION 2000

Rank	Title	Network	Rating
1	<i>Seachange</i>	ABC	13.7
2	<i>Blue Heelers</i>	Seven	13.7
3	<i>All Saints</i>	Seven	11.2
4	<i>Home and Away</i>	Seven	10.9
5	<i>The Games</i>	ABC	9.8
6	<i>Water Rats</i>	Nine	9.4
7	<i>Stingers</i>	Nine	8.3
8	<i>Neighbours</i>	Ten	7.1
9	<i>Grass Roots</i>	ABC	6.6

Source: ACNielsen, TV Trends 2001

8. The Performance of Australian Film and Television Internationally

Outside of *Moulin Rouge* – which came in at number ten on the UK box office chart, 37th on the US chart and 24th overall for international box office takings for 2001, the performance of Australian films internationally has mostly been modest. The very reasons these films have worked in Australia may be their uniquely Australian perspective, particularly when it comes to humour. It can be hard for such films to secure international pre-sales when they often have new writers and directors but no stars.

Australian films earning more than US\$100,000 gross at the US box office, 1981–2001

Rank	Title	Distributor	Release date	Gross box office (US\$)
1	<i>Crocodile Dundee</i>	Paramount Pictures	1986	\$174,803,506
2	<i>Crocodile Dundee II</i>	Paramount Pictures	1988	\$109,306,210
3	<i>Babe</i>	Universal	1995	\$63,658,910
4	<i>Moulin Rouge</i>	Fox	2001	\$51,714,332
5	<i>The Piano</i>	Miramax	1993	\$40,157,856
6	<i>Mad Max: Beyond Thunderdome</i>	Warner Bros	1985	\$36,230,219
7	<i>Shine</i>	Fine Line	1996	\$35,892,330
8	<i>Antarctica</i> (Imax documentary)	Museum of Science & Technology	1991	\$29,915,400
9	<i>Green Card</i> (Australia/France)	Buena Vista Distribution	1990	\$29,888,235
10	<i>Crocodile Dundee in LA</i>	Paramount	2001	\$25,590,119

Source: ACNielsen EDI (Australia) July 2001

Close to 70 per cent of all Australian features produced in any one year achieve a local cinema release, with only a quarter of those produced reaching UK cinemas, and a third making it to US screens.

Titles that fail to obtain a theatrical release are mainly very low-budget films hoping to secure a distributor on completion. The release rate for Australian film compares favourably with the UK, where for example, as of January 2000, 57 per cent of the films made in 1997 had either been released in cinemas or planned a release in 2000; the figure was higher for films made in 1998, at 66 per cent.

NUMBERS AND PROPORTIONS OF AUSTRALIAN FEATURE FILMS PRODUCED 1990/91 TO 1998/99 ACHIEVING CINEMA RELEASE IN AUSTRALIA, THE UK AND THE USA BY MAY 2001

	No. films produced	No. achieving cinema release			Proportion achieving cinema release		
		Aust	UK	USA	Aust	UK	USA
1990/91	27	22	8	9	81%	30%	33%
1991/92	30	19	5	4	63%	17%	13%
1992/93	22	13	3	6	59%	14%	27%
1993/94	29	20	8	10	69%	28%	34%
1994/95	18	11	3	4	61%	17%	22%
1995/96	24	20	5	9	83%	21%	38%
1996/97	34	26	5	10	76%	15%	29%
1997/98	38	20	5	4	53%	13%	11%
1998/99	41	20	5	5	49%	12%	12%
Annual average 1990s	29	19	5	7	65%	18%	23%
All films produced since 1980/81	564	386	127	157	68%	23%	28%

Source: Compiled by the Australian Film Commission

Nevertheless, despite the relatively small numbers, Australia has made a disproportionately significant impact on world screens. Films such as the *Crocodile Dundee* series, *Babe*, *Shine*, the *Mad Max* trilogy, *Strictly Ballroom*, *Muriel's Wedding*, *Priscilla: Queen of the Desert* and many more have hit it big at the international box office – and presented a distinctively Australian perspective to the world. Even *Moulin Rouge*, although set in Paris, displays a characteristically Australian style and flavour.

Australian producers of films, television and video have seen a decade of mainly sustained growth in overseas sales, with total export royalties rising from \$64 million in 1989/90 to almost three times that in 1999/2000, when they hit \$175 million. Last year they reached a record \$1132 million on the back of the Olympics television rights, without which would have only been \$107 million.

Likewise, however, there has been continued growth in audiovisual imports. Australia remains a net importer of all three media. In 1987/88 we bought \$350 million worth of overseas film, television and video; in 2000/01 the figure was \$634 million, down from a record \$638 million the previous year.

Television is where the deficit has grown significantly with the importing of material for pay television having a considerable impact along with a large increase in US drama imports.

But despite the huge jump in spending on imports, Australia's strong moves into overseas television markets over the past 10 years have slowed growth in the overall deficit. One factor driving export growth has been the importance of overseas pre-sales in funding local television productions. According to the Screen Producers Association of Australia the license fees that broadcasters pay for programs are declining in real terms and local production companies are increasingly looking to international pre-sales to fill the gap between production costs and local license fees.

Serials such as *Neighbours* and *Home and Away* recoup a major proportion of their budgets from multi-million dollar overseas sales.

Europe was central to Australian exports growth throughout the early 1990s. Germany, for example – one of the most lucrative territories – deregulated in the 1980s and went from a few terrestrial broadcasters to more than 20. There was suddenly a lot of airtime to fill and Australian producers helped fill the gap. Sales to Europe dipped to around 15 per cent of all Australian audiovisual exports in 1998/99, but rose to 20 per cent in 1999/2000.

TV program sales to the US have risen from around \$5 million annually in the early 1990s (comprising around 10 per cent of total TV exports) to more than \$30 million in 1997/1998 and 1998/99 when it was around 30 per cent of total TV exports.

9. The performance of Canadian and New Zealand Film and Television in Australia

Canadian and New Zealand films rarely reach Australian audiences. Over the previous 18 years, Canadian and New Zealand films have each made up approximately 1 per cent of all the films released in any year. New Zealand has never had more than three Australian releases in any one year (reaching that in 1999, 1993 and 1990), while Canada has fared a little better with eight films gaining an Australian release in 1997 – the year of *The Sweet Hereafter* and *Crash*.

NUMBERS OF AUSTRALIAN AND OVERSEAS FILMS SCREENED IN AUSTRALIAN CINEMAS 1984–2001

	Australia	NZ	Canada	USA	Total
1984	25	1	4	146	223
1985	17	-	4	136	194
1986	30	2	-	155	239
1987	31	1	5	168	259
1988	36	2	3	167	281
1989	39	-	3	163	291
1990	22	3	6	153	252
1991	22	1	3	149	240
1992	29	1	6	135	229
1993	22	3	5	172	259
1994	26	2	6	153	252
1995	14	1	3	171	253
1996	25	1	3	190	281
1997	30	2	8	184	285
1998	20	-	3	189	273
1999	24	3	6 ^(a)	174	255
2000	22	-	6 ^(b)	167	250
2001	27	1 ^(c)	1 ^(d)	163	245
Proportions					
2001	11%	-	-	67%	
18 year av.	10%	1%	1%	64%	

a) includes one UK/Can co-production

b) includes three co-productions

c) USA/NZ co-production

d) UK/Can co-production

When Canadian and New Zealand films do make it to our shores, they seldom do very well at the Australian box office.

Over the past three years 12 Canadian and/or Canadian co-productions have been released in Australia with the Hungarian/Canadian co-production *Sunshine* faring best at over \$800,000. *Sex – The Annabel Chong Story* earned close to half a million Australian dollars, followed by *Eye of*

the Beholder, David Cronenberg's *Existenz* and *Cube*. Other films to have done well at the box office in Australia include *Black Robe* (a co-production with Australia) which made over A\$2 million in Australia, *Crash* and *Jesus of Montreal*.

PERFORMANCE OF CANADIAN FILMS IN AUSTRALIA 1999–2001

Year	Name	Country of Origin	Distributor	Box Office
2001	<i>The Claim</i>	UK/FRA/CAN	Fox	\$115,633
2000	<i>Sunshine</i>	Hun/Can/Austria/Germ	UIP/Paramount	\$852,687
2000	<i>Sex – The Annabel Chong Story</i>	Canada	Potential	\$447,620
2000	<i>Eye Of The Beholder</i>	UK/Canada	Roadshow	\$435,471
2000	<i>Felicia's Journey</i>	UK/Canada	Fox	\$304,501
2000	<i>Emporte-Moi</i>	Canada	UIP/Beyond	\$42,167
2000	<i>Grass – The Movie (Doco)</i>	Canada	Niche	Not available
1999	<i>Existenz</i>	Canada/UK	Columbia	\$401,517
1999	<i>Cube</i>	Canada	Dendy	\$329,413
1999	<i>Cirque De Soleil</i>	Canada	Imax	\$277,362
1999	<i>The Hanging Garden</i>	Canada	Palace	\$144,310
1999	<i>Love And Death On Long Island</i>	UK/Canada	Niche/Maverick	\$64,396
1999	<i>Sweet Angel Mine</i>	Canada/UK	Fox	\$1,895

Source: MPDAA

New Zealand has only released four films in Australia in the past four years. However, *What Becomes of the Broken Hearted* the sequel to the immensely popular *Once Were Warriors* made over A\$3 million and *The Lord of the Rings: Fellowship of the Ring* made close to A\$15 million. Other New Zealand films to have done well at the Australian box office include Peter Jackson's *Heavenly Creatures*, *Once Were Warriors* and *The Piano*.

PERFORMANCE OF NEW ZEALAND FILMS IN AUSTRALIA 1999–2001

Year	Name	Country of Origin	Distributor	Box Office
2001	<i>Lord Of The Rings: Fellowship Of The Rings</i>	US/NZ	Roadshow	\$14,923,060
1999	<i>What Becomes Of The Broken Hearted</i>	NZ	Universal/Poly	\$3,234,902
1999	<i>Heaven</i>	NZ	Roadshow	\$42,438
1999	<i>Via Satellite</i>	NZ	Roadshow	\$12,525

Source: MPDAA

In terms of audiovisual trade, there has been little or no audiovisual imports from New Zealand or Canada over the past decade. However, in 2000/01 New Zealand imported \$4 million worth of material. This is compared to a large increase in audiovisual exports. Australia's exports increased from \$6 million in 1997/98 to \$16 million in 1999/2000 and \$33 million in 2000/01. This too though would include an Olympics-based spike.

The most significant Canadian television series to receive an airing in Australia to date has been *De-grassi Junior High*, while New Zealand's most successful home-grown series *Shortland Street* was shown on SBS in the early 1990s.

10. Useful Websites

Federal Agencies

Australian Film Commission: <http://www.afc.gov.au>

Australian Film Finance Corporation: <http://www.ffc.gov.au>

Film Australia: <http://www.filmaust.com.au/>

ScreenSound: <http://www.screensound.gov.au/>

Australian Film, Television and Radio School: <http://www.aftrs.edu.au/>

Australian Children's Television Foundation: <http://www.actf.com.au/>

SBS Independent: <http://www.sbs.com.au/sbsi/>

AusFilm: <http://www.ausfilm.com.au/>

State Agencies

NSW Film and Television Office: <http://www.fto.nsw.gov.au>

Pacific Film and Television Commission (PFTC): <http://www.pftc.com.au>

Melbourne Film Office: <http://www.film.vic.gov.au/MFO/>

South Australian Film Corporation: <http://www.safilm.com.au>

ScreenWest: <http://www.screenwest.com.au>

Screen Tasmania: <http://www.screen.tas.gov.au>

Public Broadcasters

Australian Broadcasting Corporation (ABC): <http://www.abc.net.au/>

Special Broadcasting Service (SBS): <http://www.sbs.com.au>

Industry Organisations

Australian Cinematographers Society (ACS): <http://www.acs.asn.au>

Australian Screen Directors: <http://www.asdafilm.org.au/>

Australian Screen Editors Inc (ASE): <http://www.screeneditors.com>

Australian Writers' Guild (AWG): <http://www.awg.com.au>

Media, Entertainment and Arts Alliance (MEAA): <http://www.alliance.org.au>

Screen Producers Association of Australia (SPAA): <http://www.spaa.org.au>

Reference Material

Get the Picture: <http://www.afc.gov.au/gtp/>

Foreign Production in Australia: http://www.afc.gov.au/resources/online/pdfs/mb_forprodlaunch.pdf

12.5 per cent Tax offset: http://www.dcita.gov.au/Article/0,,0_1-2_1-4_16014,00.html

Co-productions: http://www.dcita.gov.au/Article/0,,0_1-2_1-3_209-4_15576,00.html
