



Common Ground

Opportunities for Australian screen partnerships in Asia



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Front cover image: *Serangoon Road*

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Australian Government



Introduction

Australia is in the process of discovering new ways to work with neighbouring countries across Asia. Our evolving economic and cultural engagement with the region has seen an expansion of opportunities for collaboration across different sectors, and the Australian screen production industry is already beginning to take advantage of this.

Screen industries in Asia are expanding due to the growing maturity of the sector and a desire to open up their markets. PricewaterhouseCoopers predicts that the filmed entertainment market in the Asia-Pacific will expand at a 2.6 per cent compound annual rate from \$21.6 billion in 2012 to \$24.6 billion in 2017.¹ A growing middle class is creating new audiences and leading to increasing popularity of platforms such as cable television as well as high uptake of social media.

This report highlights the benefits that can flow from a genuinely collaborative approach to our relationships with Asian partners and markets. Australia has some key advantages on this front: we are liked and trusted, our skills are valued, we are seen as having affinity with the region and we create stories with international appeal.

Australia already has some important common ground with Asian territories. The movement of people, ideas and cultural products across national boundaries is a defining characteristic of today's world, and there is considerable potential to capitalise on shared experiences stemming from historical events and the migration of people to and from Australia. New patterns in immigration are bringing new relationships, especially with Asia. Cultural and business exchange is now ubiquitous in contemporary societies and economies. Screen content is an important element of this exchange, and Australia already has a screen presence in the region through co-productions, partnerships and sales, as well as through broadcast platforms such as the Australia Network.

The push to strengthen relationships between Australian and Asian region businesses is supported by the Australian Government through a range of measures.

However, it is also important that screen producers have access to knowledge about territory- and sector-specific opportunities, and advice on how to best form and maintain regional networks and partnerships.

To this end, Screen Australia has undertaken research to better understand how Australian screen businesses have been working in the Asian marketplace and identify areas of further collaboration. The resultant report draws together insights from producers, broadcasters, financiers and screen agencies from across Australia and the Asian region.

The research focuses on eight territories: China, Republic of Korea (South Korea), Malaysia, Singapore, Thailand, Indonesia, India and Japan. These territories were chosen as they have had existing relationships with Australian screen industries over the past five years that we can learn from, such as production partnerships, location shooting and content sales.²

Best estimates indicate that the value of audiovisual (and related services) exports to the focus countries has been around \$50 million per year over the last three years, which represents around a quarter to a third of Australia's total audiovisual exports for those years. That's not too bad considering that English-speaking territories are likely to be the strongest market for our content, but there's certainly room for improvement.

Common Ground describes recent activity, new developments and the factors for success evident to date, as well as outlining some key challenges and areas of greatest potential for expanding on this base. It also contains a set of recommendations for government agencies and the broader industry, including advice for producers seeking to work in the region.



The Dragon Pearl



Key findings

Common Ground explores Australia's current engagement with the screen production sector across the Asian region – our similarities, our points of difference, what is working well and what we can do to improve our business relationships.



The following major findings emerged from the research:

- Several territories are undergoing rapid expansion and development of their screen industries, so the opportunities for collaboration with Australia are likely to change significantly over the next five years. Now is the time for the Australian screen industries to strengthen ties, formalise co-production arrangements and develop our knowledge of working together in order to foster and maintain mutually beneficial relationships into the future.
- Government has an important role in facilitating an environment of trust and fostering relationships.
- Successful collaborations with Asian partners require significant investment from both sides and producers need to commit considerable time and money.
- Australian screen producers are generally perceived within the screen industries across Asia as professional, likeable and trustworthy with a level of affinity with the region.
- Co-creating stories for both markets from the early development stages or concentrating on content that is universal (such as science, technology and shared history) is key to success in Asian markets.
- China, South Korea, Malaysia and Singapore currently offer significant opportunity to Australian screen businesses, with India, Indonesia, Japan and Thailand holding great potential for the future.

An overwhelming theme that emerged was the importance of genuine collaboration: this will underpin all success. Productive business relationships require a basis in mutual respect, the exchange of ideas and practices, and a genuine engagement with difference.

Mapping current activity

The past five years have seen the expansion of the global marketplace. Some Australian screen production companies have capitalised on this trend by focusing increasingly on Asian markets and establishing mutually beneficial working relationships.

This research seeks to tap into the experience of these companies, their partners and other key stakeholders across the region to provide insights into the current environment as well future opportunities and how to make the most of them.

The analysis is based on:

- interviews with 31 Australian producers, agencies and organisations with experience working with the focus territories
- interviews with 27 producers, agencies and organisations in the focus territories
- a survey of 51 Australian production companies that have had projects involving the focus territories in the past five years.

To attempt a co-production in Asia, you need to be well capitalised. We calculate you need around \$300–500k to properly develop, finance and bring a co-production to close.

Since it's expensive and time-consuming to put together a co-production, emotion and cost really drive you to want it to work. However, at the pointy end of the process pressure may be put on you to compromise your deal.

Irrespective of the emotion or cost, you have to always be pragmatic and be able to walk away in your longer-term best interests.

Mario Andreacchio, AMPCO Films, Australia

Percentage of Australian producer survey respondents who had done business with each territory



Source: Australian producer survey: N=51



Attitudes and experiences

I like Australians and I trust them.
Harry Cu, SAMG Animation, Korea

I tell them you don't need to go to Hollywood. Go to Australia. They have the Producer Offset and they are just as good as Hollywood.
Chua Chye Seng, IFS, Singapore

Screen Australia was great at Asian Side of the Doc and got people excited; we felt like producers were excited about the possibility of working with us.
Nandita Solomon, Apparat, Malaysia

Australian producers know what international broadcasters want.
Nandita Solomon, Apparat, Malaysia

The study explored the perceived strengths of the Australian industry in engaging with Asia and why stakeholders across the focus countries have chosen to work with or would consider working with Australian partners. The following factors were consistently cited:

ATTRIBUTES OF AUSTRALIA

Shared history and Asian diaspora communities in Australia

Both local producers and overseas interviewees saw Australia's shared history with Asian countries and the experiences of Asian Australian individuals and communities as a rich source of story content with the potential to appeal to audiences in Australia and the focus countries. Interest in prominent Asian Australians, for example, is demonstrated by the sales of content featuring personalities such as Kylie Kwong (*My China, Simply Magic*), Poh Leong (*Poh's Kitchen*) and Luke Nguyen (*Luke Nguyen's Vietnam*).

Geography

Both local producers and overseas interviewees commented that Australia's natural landscape makes it an attractive location for production shoots. The similarity of time zones makes us part of Asia and easy to deal with.

Government support

Government support mechanisms for the screen industry in Australia were described by overseas interviewees as reliable and well organised. Local producers noted that the Producer Offset gives Australian producers the ability to bring some investment to the table. Local producers also considered that the stability of government in Australia is reassuring for Asian partners.

ATTRIBUTES OF THE AUSTRALIAN SCREEN PRODUCTION INDUSTRY

Creative and technical skills

The Australian screen industry has capacity for quality storytelling, design and other creative aspects of screen production. Australia has a good track record of production in high-quality series and is well positioned to handle scale of production. Australia's post, digital and visual effects sector is regarded across the region as being world class.

Professionalism and international best practice

The Australian screen industry has a reputation in the region for being highly professional. Australia is seen as representing international best practice in a number of areas including production management and production accounting.

Experience creating content for international markets

Australian producers' experience in creating content for international markets is highly regarded, especially for children's content. Companies in the region stated that Australia has good connections to international distribution networks, and that working with Australian partners could help propel their content into markets beyond the region.

Existing relationships and track record

Where overseas interviewees had worked with Australian partners, they stated that they would work with those companies again.

Current support mechanisms

A number of support mechanisms are already in place aimed at boosting cultural and commercial exchange across the film, television and digital content industries.

Such support includes overarching government policy levers such as the Australian Government's push to build engagement with Asia, Australia's international co-production program and Austrade's business support for the creative industries in emerging markets.

It extends to Screen Australia's work to build relationships with its regional counterparts, which sits alongside the support of the Australian state screen agencies and the broadcasters, travel grants administered by both the Commonwealth and state governments, and state agency-led initiatives for producers wishing to bolster their presence in key territories.

See also: 'Current engagement and support mechanisms' on page 26.

Success factors



'Bait 3D' is an official Australia–Singapore co-production between Pictures in Paradise, Story Bridge Films, Arclight Films International and Singapore's Black Magic Design, supported by Screen Australia, Screen Queensland and the MDA. The film also had significant investment from China's Yunnan Film Group and Enlight Pictures, which distributed Bait 3D in China. Additional scenes were shot in Beijing for the Chinese theatrical release version, which went on to gross over US \$20m at the box office in China. Arclight's Gary Hamilton is currently developing a subsequent project with Chinese co-producers.

The factors contributing to successful engagement between Australia and the focus countries were explored from the perspective of both Australian producers and Asian region partners.

Track record

Australian producers cited having already successfully completed a project with a partner or investor in that country as a key contributor to success. Once trust has been developed and an individual has a proven ability to work in the territories and navigate the different systems, new opportunities can emerge.

Credibility through presence of government

In the absence of prior completed work, the presence of government is an effective component of building credibility and trust in Asia. Australian interviewees noted that this was particularly useful in the early stages of building a relationship and often involved government-to-government interactions.

Survey respondents and local interviewees described the following types of government presence as being effective when establishing relationships:

- attendance or introduction by an Australian Government minister at a meeting
- attendance by a senior representative of a state or federal screen body

- participating in a delegation led by a screen agency.

Asian region interviewees also emphasised that a government presence or endorsement gave them confidence in Australian producers.

Content matters

The experience of local producers indicated that the content must be relevant to audiences in the investing market. Partners consider the ability to sell into their own market as a significant priority, as well as the possibility of content deals with distributors and Asia-centric broadcasters such as HBO Asia and Discovery Asia.

The exception to this was Singapore. Australian interviewees described Singaporean partners as having a willingness to invest in projects that did not have significant local relevance or interest, perhaps because of the limited size of the Singaporean market.

Investment in a region and relationship is a long-term prospect

Visiting a prospective partner is a vital component of building and securing relationships. However, in order to build the credibility mentioned above as well as secure a fair position in a negotiation, local producers interviewed consistently noted the time and cost involved in establishing the relationship.

Asian region interviewees affirmed that it was easier to do business with Australian companies which had a presence in the country or the region and that visits in person from senior executives were appreciated as a sign of commitment to the partnership.

Attendance at regional and international markets

Several Asian region interviewees stated that connections made at international markets and summits had formed the basis for partnerships with Australian companies. MIPCOM and MIPTV were frequently cited as events where they could connect with the Australian screen industry.

Markets and industry events in the region that were highlighted as vital platforms for interacting with potential international partners included: Asian Animation Summit, Asian Side of the Doc, Screen Singapore/Asian Television Forum, Busan International Film Festival/Asian Project Market, Hong Kong Film Market, FICCI Frames and Goa Film Bazaar (see box page 27).

The Australian public broadcasters agreed that regional and international markets played a crucial role in gathering audiences for Australian content and highlighting Australian talent to potential partners.

Opportunities

The best way to get Asian partners on board is to present a compelling project ... Once they get a toe in the Offset they will become comfortable with it quickly.

Chua Chye Seng, IFS, Singapore

Australian content that is universal could work well in Korea.

Kenny Kihyung Bae, KBS, South Korea

China, Malaysia and Singapore were identified by interviewed Australian producers as currently offering the greatest potential for screen partnerships. The survey confirmed this, showing that expectations of increasing revenue were highest for China, followed by Singapore, then Malaysia.

The following factors were cited as driving expectations of growth:

Financing and investment

Local producers and regional stakeholders regarded the substantial government support for co-produced and/or foreign productions offered by some territories as a key driver of engagement between Australia and neighbouring screen industries. In addition, government-private co-ventures and state-run enterprises are providing significant capital to film and television projects involving foreign partners in some countries.

Co-financing was the most commonly cited perceived opportunity amongst the surveyed producers, with 60 per cent considering at least one of the focus countries as a source of potential co-financing. China, Singapore and Malaysia in particular were seen as

likely co-financers. Investment was seen as an opportunity by 52 per cent of surveyed producers; in this case, China and Singapore were seen as offering the greatest potential.

There are also opportunities for Australian producers to access alternative sources of finance. For example, Singapore's IFS Capital has cashflowed the Producer Offset for Australian feature films. As awareness and experience of the Producer Offset in the region grows, it is likely that opportunities to access Offset cashflow finance will expand.

Co-productions

58 per cent of surveyed Australian producers perceived official and unofficial co-productions with at least one of the focus countries as opportunities for their business, particularly China, Malaysia and Singapore.

Some identified opportunities around official co-productions for countries with no formal arrangements with Australia, mainly those for which negotiations are currently underway (Malaysia, India and South Korea).

Asian region interviewees asserted that companies previously known for providing inexpensive production services are now

Revenue expectations

Australian producers' expectations of increasing revenue from the Asian region were highest for Mainland China, followed by Singapore, then Malaysia.

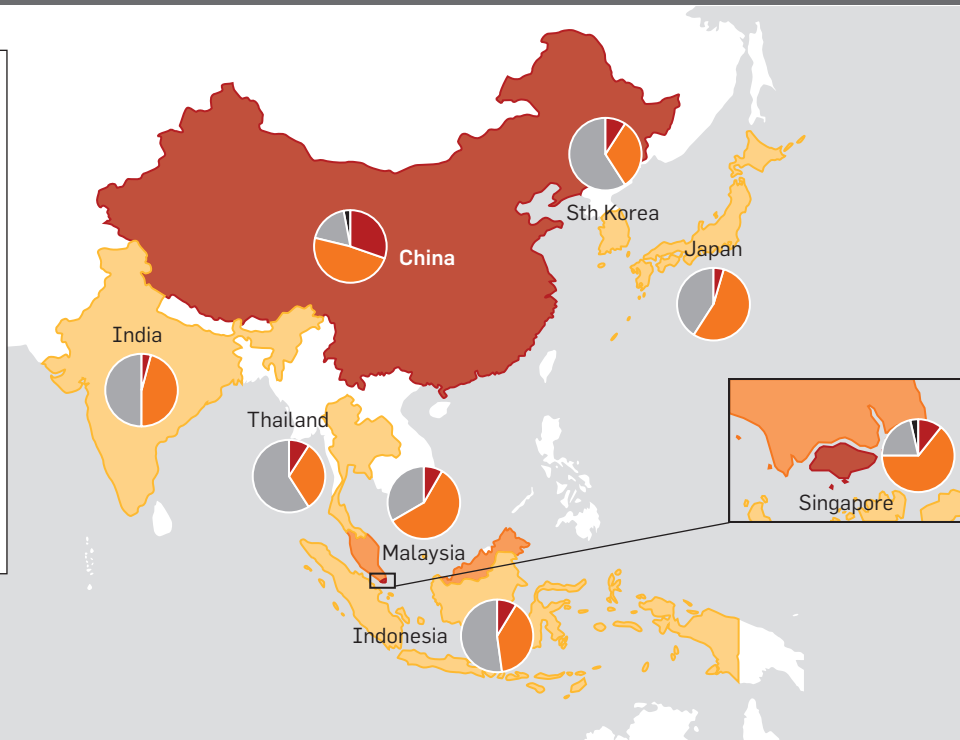
Overall expectations of revenue expansion

LEAST GREATEST

Level of expansion expected (proportion of responses)

Contract
Stay the same
Expand

Expand significantly



Source: Australian producer survey: N=43

looking for a more meaningful role in the development of intellectual property in their international collaborations. As these companies develop capacity and expand their talent pool, co-production relationships and shared creative control will become more important for effective partnerships in these territories. Collaborating with co-production partners in the early stages of script development provides creative as well as commercial benefits; co-development of stories gives projects a greater likelihood of appealing to audiences in both countries.

Mentoring and professional development

The in-depth interviews with local producers and Asian region stakeholders revealed that Australia's large pool of established screen businesses and experienced talent was an advantage in any potential collaboration. There is an opportunity for established Australian screen businesses and practitioners to mentor emerging practitioners such as producers, writers, editors and production managers from screen industries in the region that are undergoing rapid expansion and development. Providing

professional development opportunities makes Australia an attractive partner for companies in the region, as well as building a solid basis for further collaboration.

Increasing international focus among Asian screen industries

All Asian region interviewees stated that their industries had become more internationally focused in the past five years. The flow of finance, talent and content has intensified both within the Asian region and across Asian, European and US screen industries. Many producers, broadcasters and other stakeholders in the focus countries are actively looking for international partners for co-production, co-financing and distribution.

Content that appeals to audiences in the region

It became apparent through interviews with the Australian and international broadcasters that a range of Australian television content sells well into the region, including children's animation, documentary and factual/lifestyle content. Australian content often performs well if it has a connection to the country or

the region, through subject matter, setting, people or perspectives.

Documentary content that speaks to international audiences, such as wildlife or science programs, is also in demand. The market for television documentaries about science is particularly strong in China, Singapore, Japan, South Korea and Thailand.

Overall, 52 per cent of local producers surveyed considered pre-sales or sales of completed programs to the focus countries as an opportunity for their business, with China and Japan rating particularly highly.

New media markets

The media industries in many of the focus countries are undergoing rapid change, opening up new opportunities for the distribution of content and access to new audiences.

The rapidly expanding middle class in many of the focus territories means that audiences have more disposable income to spend on entertainment. In addition, youth audiences in many of the focus countries are highly engaged with social media, providing a conduit to engage this demographic.

Perceived opportunities for screen production businesses in Asia, by territory

No. of responses



Source: Australian producer survey; ranked according to number of respondents who mentioned the opportunity for at least one of the focus countries. N=48



Challenges

There is a lack of familiarity with each other. The first collaborative project usually will come across some difficulties due to unfamiliarity with each other.

Sue Hu, Rare Media,
China

One of the challenges for Australian-based independent producers like WTFN is being able to convert opportunity with the (understandable) discrepancies in television production budgets between two territories.

We've had strong interest from broadcasters in Malaysia, China and India for a range of series but the difficulty we've had as new players into those markets is how to meet price expectation against what an hour of factual television costs us to make.

Ben Ulm, WTFN,
Australia

Information about the Australian industry is crucial for co-operation.

Sue Hu, Rare Media,
China

The study explored the challenges or obstacles to greater engagement through in-depth interviews with both local producers and Asian region stakeholders, as well as the producer survey.

Difficulty establishing business relationships

Difficulty establishing business relationships was the most commonly cited obstacle among the producers surveyed. Responses were reasonably consistent across the focus countries: South Korea and Thailand had the highest rate of perceived difficulty in establishing business relationships at 47 per cent, and Malaysia the lowest at 34 per cent. Local interviewees commented on the need for trust to be developed over sustained periods of time, with many in-person visits required.

From both the local and Asian region interviews it emerged that the majority of business relationships had initially been formed through participation in a delegation, or attendance at relevant regional festivals and markets. Following this, a major factor was to demonstrate commitment to the relationship by visiting each other's offices. This is resource-intensive and takes time to develop.

Lack of financial resources to pursue opportunities

Local producers emphasised that a large part of the difficulty in establishing relationships was due to limited financial resources and the need to focus on a relatively small slate of production. 41 per cent of local producers surveyed cited a lack of financial resources to pursue opportunities in the focus countries as an obstacle to greater engagement. The costs of several trips, accommodation and other services such as translators create a significant barrier, effectively limiting the number of partners they are working with at any one time.

Suitability of content for markets

Interviews with both Australian producers and overseas broadcasters and distributors noted that uniquely Australian content did not carry any particular advantages or appeal for Asian markets.

Moreover, it was acknowledged by local producers and Asian region interviewees alike that some types of Australian content would not appeal to audiences in the focus countries. 33 per cent of producers perceived

the lack of a market for their content as an obstacle to greater engagement. Japan and India rated highest as countries where local producers did not consider there to be a market for their content. Interestingly, Japan also ranked highly as a country offering opportunities for presales or sales of completed programs, suggesting that local producers have a firm understanding of the types of content that are suitable for this market.

Local and Asian region broadcasters and sales agents interviewed by Screen Australia have indicated that markets in the focus countries are increasingly opening up to international content. Asian region interviewees considered Australian documentary, lifestyle and children's content as having the greatest potential in their respective markets.

Lack of co-production treaties

Australia currently has co-production arrangements with 11 countries, but just two of these are in Asia: China for feature-length productions only (theatrical or telemovies) and Singapore for feature film and television. Among the surveyed producers, the lack of a co-production treaty was perceived to be most relevant in relation to engaging with the Japanese screen industry, with 30 per cent of producers considering this to be an obstacle.

In follow-up interviews with local producers it was noted that the lack of access to rebates made available through the presence of a treaty limited their ability to contribute finances into a production. Although no figure was able to be established for the number of projects that have stalled or not been taken to market due to the lack of co-production treaties with Asian countries, the perspectives shared indicated that opportunities continue to be missed. However at the same time, some producers and SPAA suggested that co-productions would not suit all projects.

Local broadcasters pointed out that official co-production status allowed for shared creative control with Asian region partners where content needed to conform to local content requirements on Australian television. In these cases, the absence of a co-production treaty means that collaboration is restricted to a production services outsourcing arrangement with regional partners.

The degree to which Asian region interviewees considered the absence of a co-production treaty an obstacle to engaging with the Australian screen industry varied. For some interviewees who had limited access to government support for co-productions in their country, official co-production status was seen primarily as something that would assist Australian partners to raise finance, without necessarily making a difference to their own ability to do so. For others, official co-production status was important in ensuring that a project could meet local content requirements for cinemas or broadcast channels.

Piracy

Although local producers considered piracy to be a major barrier to the success of content in Asia, it varied greatly across the focus countries in terms of being considered an obstacle. Japan, Singapore and South Korea were rated as piracy concerns by less than 10 per cent of survey respondents. Piracy was perceived to be the largest obstacle in China, and was also noted as a concern in India, Indonesia and Malaysia.

Overseas interviewees acknowledged the prevalence of piracy, but stated that working with local partners in the focus countries can help mitigate the potential impact, because of their knowledge of how to derive value from their own market.

Discrepancy in budget levels

Producers described challenges in both negotiating and delivering on productions in some Asian countries due to the differences in expectations of production budgets.

Complexity of Australia's film financing mechanisms

The local producers interviewed mentioned the following factors as adding to the complexity of negotiations:

- The Australian co-production points system (in place to ensure equal contributions from partner nations in official co-productions) is more complex than the systems from other countries.
- Some Australian completion guarantors require co-producers to provide their financial contribution up front (impractical in nations with high borrowing rates).

- The time to approve changes or receive a completion certificate directly impacts the producer's profit but also hinders the relationship with the overseas party.

Overseas interviewees stated that many companies in the Asian region were not used to having a completion guarantor and that the complex legal documentation required by Australian productions could be a disincentive to work with Australia.

Variety of licensing arrangements

Local interviewees described vast differences in licence fees paid for their content across Asian countries, reflecting factors such as population size, distribution methods and uptake of services such as IPTV. Overseas interviewees revealed that television licence fees across the region can be much lower than those offered by Australian broadcasters.

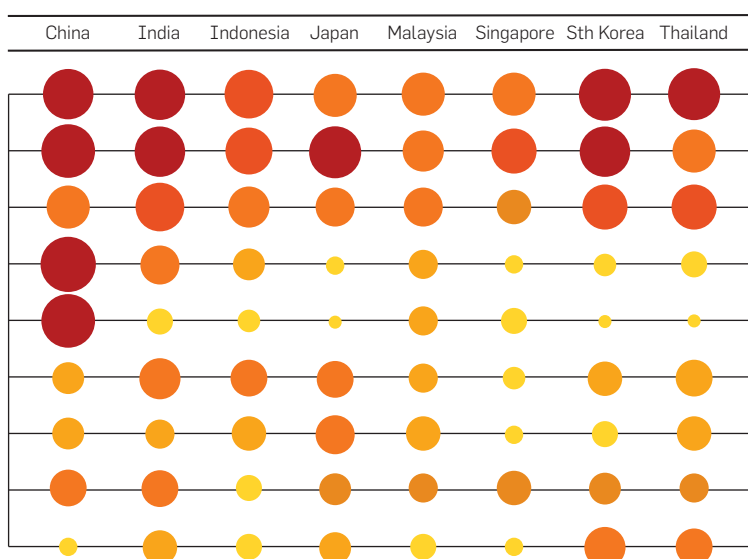
Overseas interviewees involved in animation production in Malaysia and Indonesia noted that revenue derived from broadcasters is only a small percentage of their total revenue, as much as 90 per cent of which comes from licensing and merchandise sales.

Perceived challenges for screen production businesses in Asia, by territory

No. of responses



- Difficulty establishing business relationships/ No business relationships
- Lack of financial resources to pursue
- Lack of knowledge/expertise within the business
- Piracy
- Censorship
- There is no current market for our content
- Lack of a co-production treaty
- Already have established relationships with other territories/ focussing on other territories
- Haven't considered it



Source: Australian producer survey; ranked according to number of respondents who mentioned the obstacle for at least one of the focus countries. N=45



Where to now?

The research suggests that the groundwork for a productive working relationship is already laid but that we can do much to strengthen these ties.

Australian screen practitioners are helped by the fact that they are considered to be professional, friendly and reliable and have a good rapport with their neighbours across the Asian region. At the same time, government support and backing continues to be instrumental in allowing these relationships to grow. Attendance at markets in the region facilitates connections and producers are encouraged to attend if they are looking to build partnerships. A proven track record in collaboration is, however, invaluable for potential partners.

Regional markets and forums such as the Asian Animation Summit, Asian Side of the Doc and the Australia-China Film Industry Forum, complemented by the many significant international film festivals, continue to be vital as spaces enabling face-to-face meetings. Up until now there has not been an equivalent forum in Australia that encourages producers from across the Asia-Pacific to network with Australian producers. It is timely then that we consider options to facilitate these links, such as a screen agency-hosted market for producers and broadcasters across the region. This would showcase Australia's screen production facilities as well as provide a formal outlet for the sharing of information and experience between Australian agencies and their regional counterparts.

Beyond the importance of personal connections, Australian producers are aided by Australian Government support mechanisms which are generally seen as reliable and well organised once they are understood. For the unfamiliar, however, these systems can seem onerous and there is space for Screen Australia to improve resources to better explain how things work. A strong theme from the research was the recognition that, like all working relationships, a successful partnership requires investment from both sides to thrive. Producers need to be prepared to commit time and money to make it work. This means

working together for the whole lifespan of a project from its creative development to final release. It also means acknowledging there may be roadblocks along the way, such as discrepancies in budgets and licence fees, and different working styles, but that these can be overcome.

Differences in the ways we do business, the types of content we seek and the scale of budgets and licence fees can create challenges, but there is genuine enthusiasm and willingness within the Australian sector and across the region to work together. This also highlights why it's important that Australian screen agencies and businesses increase their Asian capability and cultural competence in order to bridge these differences.

Content that is universal, such as science, technology or light entertainment, creates opportunities. Producers who look to points of shared interest rather than focusing on points of difference will succeed and we have seen this in the success of co-productions such as *The Coral Triangle*, *Bait 3D* and *The Story of Australia*.

Ongoing opportunities for collaboration are essential if links across the region are to grow. This will encourage skill sharing between companies and build capacity. Supporting frameworks also need to be put in place to ensure this level of exchange and collaboration continue into the future. Co-production treaties provide this support by being a formalised agreement that rests upon creative and financial contributions made by both parties in equal measure.

Common Ground highlights the many factors that need to be considered when mapping the state of play between the Australian screen sector and its Asia-Pacific counterparts. As the screen industries globally build their capabilities and adapt to the international marketplace, it is crucial that Australia takes steps now to cement our links with our neighbours in order to enjoy productive relationships and create business opportunities.



Hoopla Doopla

Recommendations

Government agencies can make an important contribution by facilitating relationships and creating environments of trust, clarity and credibility that support Australian producers to do business. They should:

- strengthen government-to-government relationships with Asian region counterparts
- continue to provide information and resources on the Australian production community and its supporting systems including the Producer Offset
- continue to lead targeted delegations and ensure a government presence at international markets in the region
- lend support to Australia's international co-production program
- encourage and support visits from agency representatives and screen delegations from the Asian region and their engagement with the Australian screen industry
- hold a biennial networking event, hosted by Screen Australia and state screen agencies
- encourage skill sharing across the region through regular collaboration, exchange and internships within production sector businesses
- develop Asian capability and cultural competence within agencies
- develop and resource, in consultation with industry, targeted initiatives that increase screen development and production opportunities between Australian and Asian production companies.

Local screen industry guilds and associations have a role in assisting their members to increase their Asian capability and expand their networks. They should:

- provide opportunities for members who have worked successfully in the Asian region to share their experiences and knowledge via platforms such as annual conferences
- expand relationships with screen guilds or other organisations in the region to enhance information sharing between Australian and Asian screen industries
- explore opportunities for their members to meet with screen practitioners from the Asian region via partnerships with cultural or industry organisations, for example partnerships with film festivals.

And for their part, **Australian screen businesses** who want to be successful in this space should:

- build their Asian capability and cultural adaptability, including Asian language skills where possible
- invest in relationships through regular face-to-face meetings and attending international markets
- work with their partners from a project's inception: successful projects stem from successful partnerships
- endeavour to provide professional development, mentoring or skills sharing opportunities to emerging practitioners in partner companies in Asia during development or production of content.



Territory profiles

Taking into account the characteristics of their respective screen industries, local producers' perspectives and discussions with broadcasters, producers and other screen industry players in the region, **China, South Korea, Malaysia** and **Singapore** have been identified as territories currently offering significant opportunity to Australian screen businesses.

69 per cent of local producers surveyed saw opportunity in China, due in large part to the size and rapid growth of the market. The interviews revealed that a number of Australian production companies have already dedicated resources into expanding their relationships and presence in China.

Singapore was ranked second for opportunity by the local producers surveyed, with 67 per cent seeing potential for engagement with their business. With a co-production treaty in place for both feature films and television productions and strong government support via the MDA, Singapore is seen as offering co-financing, investment and co-production opportunities. Singapore ranked equal highest with China as a territory offering access to other international markets.

46 per cent of the local producers surveyed saw opportunities for their business in Malaysia. Most commonly cited were production partnerships and co-financing as well as less expensive production or post production services. The substantial incentives introduced by the Malaysian Government are a key driver of these expectations.

South Korea ranked lower amongst local producers surveyed in terms of perceived opportunity with 27 per cent seeing opportunity in this country. The strength of the South Korean screen industry as well as the established government-to-government ties between the two countries suggest, however, that there is considerable unrealised potential for collaboration between the Australian and South Korean screen industries.

Opportunities also exist in **Thailand, Indonesia, India** and **Japan** and in the long term it is likely that the Australian screen production industry will see greater involvement with these countries. Currently, collaboration between Australia and entities in these territories tends to occur

on a project-by-project basis. However, government-to-government screen agency and industry engagement is growing as part of a co-ordinated and sustained approach to seek out business opportunities.

Thailand, for example, will now host the 2nd Asian Animation Summit, and the Software Industry Promotion Agency (SIPA), a Thai government agency supporting the development and growth of the animation industry, is sponsoring the event. Indonesia continues to be a partner of interest to Australia and the groundwork is already being laid to establish relationships.

Japan ranked third highest as a country offering opportunities for Australian screen businesses, mainly due to the perceived potential for pre-sales and sales of completed programs. Local documentary producers in particular reported success selling programs to Japan and expected to continue to do so.



Mainland China

SNAPSHOT

No. screens	13,118 (2012) ³
Total box office	US\$2.7 billion (2012) ³
Domestic box office share	48% (Chinese language films, 2012) ³
No. of domestic films released in cinemas	231 (2012) ⁴
Local content regulation – cinema	Yes
Local content regulation – television	Yes
Number of domestic films produced	745 (2012) ⁴
TV households	386,641,000 (2010) ⁵
Pay TV households	188,164,000 (2010) ⁵
Broadband households	122,421,000 (2010) ⁵

Australian producers' perspectives

- 47 per cent of local producers surveyed derived revenue from the Chinese market.
- 43 per cent of local producers expected their revenue from China to expand; 27 per cent expected it to expand significantly.
- The factors most commonly perceived as opportunities by the surveyed local producers were official and unofficial co-productions, co-financing, presales and investment.
- The most commonly cited obstacles to pursuing greater engagement with the Chinese screen industry were piracy, censorship and a lack of financial resources to pursue opportunities.

Recent developments

- Online video streaming services in China have seen rapid consumer uptake and revenue growth in recent years. Intense competition between services has seen licence fees increase exponentially, including for foreign TV drama; in addition services have started creating original content to distinguish themselves from their competitors.⁶
- 2013 has been an extremely successful year for Chinese films at the domestic box office. In the first six months of the year local films pulled in 63 per cent of the box office, compared to a 36 per cent share in the first half of 2012.⁷

- Several US studios have made significant investments in the Chinese film production industry in recent years, including Legendary Pictures, which established production company Legendary East to produce large-budget Chinese movies in partnership with state-run enterprise China Film Group, and Relativity Media, which has invested in Chinese production company SkyLand Film and Television Cultural Development Ltd.

Cooperation between the Chinese and South Korean screen industries is accelerating across a range of business activities including co-productions.⁸ 2013 saw the release of China–Korea 3D film *Mr Go* in both territories. Major South Korean studio CJ Entertainment recently secured investment from China Film Group and private studio Pegasus & Taihe Entertainment for sci-fi feature *The Fist*. The two Chinese companies will contribute 30 per cent of the budget, amounting to US\$20 million.⁹ China's SAPPRFT and South Korea's Ministry of Culture, Sports and Tourism have signed a memorandum of understanding and announced plans to progress towards a full co-production treaty.

Current engagement

There are numerous links between the Chinese screen industry and Australia, including government-to-government links and production partnerships across a range of screen content forms. The Chinese screen industry is expanding rapidly across production and distribution, presenting

significant opportunities for greater exchange between the two industries.

Existing ties between the Chinese and Australian screen industries include the Australia–China co-production treaty, which entered into force in 2008. The treaty only applies to feature film production, and there have been three films made as official China–Australia co-productions since 2008: *33 Postcards*, *The Dragon Pearl* and *Children of the Silk Road*. There are a number of China–Australia feature films in development, including *The Gold Road*, a co-production between Australia's AMPCO Films and China's Shandong Film and TV Media Group.

Australian companies have produced documentaries for the Chinese broadcast market. Canberra-based Bearcage Film's series *The Story of Australia*, commissioned by CCTV9 and broadcast in China in August 2013, is a prominent example. Australian companies are also producing lifestyle programming such as cooking and travel series for the Chinese provincial broadcast market.

Australian company Beyond Screen Production has co-produced two children's series with CCTV in recent years: *Hoopla Doopla*, a live action preschool series supported by CCTV and ABC; and *Quest*, a factual program shot in China and Australia.

Australian companies have provided PDV services for large-budget Chinese feature films.

Recent Australian films released theatrically in China include *Bait 3D* and *The Great Gatsby*.

OPPORTUNITIES

Government links with the Chinese screen industry:

Screen Australia and other government agencies or government-supported bodies such as DFAT, Austrade, Ausfilm and the ABC have relationships with the Chinese screen industry and are committed to building on these relationships into the future. In addition many of the state screen agencies reported informal relationships with state-owned enterprises, government agencies and CCTV. Instances of government bodies facilitating business with China include the Australia China Film Forum and Screen Australia delegations to markets.



More than 20 million viewers in China for *The Story of Australia*

The Story of Australia is the first documentary co-production between an Australian company, Canberra-based Bearcage, and Chinese national documentary channel CCTV9.

The Story of Australia was initiated to celebrate the 40th Anniversary of diplomatic relations between the People's Republic of China and Australia. The six-part series travels around the country exploring Australia's flora and fauna, industry and innovation, Indigenous culture and heritage, agriculture and geographic diversity. *The Story of Australia* also focuses on the lives of Australians and Chinese who represent the contemporary relationship between the two countries and their cultural and community engagement.

Bearcage Films was the winner of the Small to Medium Organisation category at the inaugural Australian Arts in Asia Awards for their work with CCTV9 on *The Story of Australia*. The broadcast premiere on CCTV9 in September 2013 attracted 21.2 million viewers.

The program also caught the attention of the Chinese President, Xi Jinping, who commented to Prime Minister Tony Abbott during his visit in October 2013 that *The Story of Australia*, the very first Australia-China documentary co-production, was very popular on television. He went on to say we should tell more good Chinese and Australian stories to deepen the mutual understanding and friendly relations between the two countries.

Investment in relationships: A number of Australian production companies have invested significant resources into their relationships with the Chinese screen industry including regular travel to the country. Participants in recent Australian delegations to China have reported ongoing discussions with contacts made through the delegation. This activity lays the groundwork for meaningful and successful collaboration.

Documentary: There is a large appetite for documentary content with high production values in China and Chinese broadcasters and distributors are seeking to commission and acquire foreign documentaries. CCTV is very interested in working with international partners, as are many provincial broadcasters.

Broadcasters are looking for documentaries on a wide range of subject matter including migration history, nature, science and modern living. Documentaries about or with a connection to Chinese subject matter are popular with buyers.

Interviewees based in China stated that Australia has a reputation for high-quality documentary and factual production. Chinese entities that had worked with Australian companies reported positive experiences.

Private investment: There is a large amount of private investment in the screen industry in China. The survey of local producers reveals that Australian productions have benefited from private investment from Chinese sources.

Online video streaming services: Chinese online video streaming services can offer a wider variety of television content than broadcast channels. Many of these services license foreign content including drama series from the US and UK. The audience for foreign drama is niche, but tends to be wealthy and urban – a demographic that advertisers are keen to reach. Popular foreign series on online video services include *Downton Abbey* and *The Walking Dead*.¹⁰

The leading online video services in China are: Youku Tudou, LeTV, QQ Video, and iQiyi.

Children's content: ABC Children's Television and the CCTV children's channel CCTV14 have a strong relationship and are currently in production on their first co-produced project, preschool series *Hoopla Doopla*, produced by Beyond Screen Production. The Australian Children's Television Foundation provided script

development investment to the project and will distribute the series worldwide on behalf of the Australian and Chinese partners.

A large number of animation production companies in China are rapidly building capacity and could be potential production partners.

Markets and festivals: Major international markets and festivals in China, such as the Shanghai International Film Festival (SIFF) and the Sichuan TV Festival, provide platforms for Australian producers to establish relationships, promote their content and attract investment. SIFF is one of the largest film festivals in East Asia and is accredited by the International Federation of Film Producers Associations (FIAPF). In addition to a screening program, SIFF features industry forums, a film financing market and awards, including the Golden Goblet Award for best film and Asian New Talent Award. The Sichuan TV Festival, which includes the international 'Golden Panda' awards as well as a television market, is hosted by SAPPRT and the Sichuan Provincial People's Government.

CHALLENGES

Lack of awareness or experience of the Australian screen industry: Interviewees based in China who had had no contact or limited involvement with Australian partners

stated that one of the challenges was not knowing where to find information about Australian production companies and their capabilities.

Some Australian producers reported that there is still more work to be done in raising awareness of the Producer Offset in China. Others stated that the mechanism of the Offset can be difficult to explain to Chinese partners as it is distinct from Chinese government investment incentives.

The three Australia–China feature film co-productions released to date have been relatively low profile. The box office success of *Bait 3D* in China has, however, gone some way to raising the profile of Australia–China feature film collaborations. While *Bait* is not a Chinese co-production, it did involve Chinese investors and a second project (originally *Bait 2* but retitled *Deep Water*) is in development with Chinese co-producers. The success of *Sanctum 3D* and *The Great Gatsby* at the Chinese box office has also drawn attention to the Australian screen industry.

Capacity to co-produce and due diligence:

There are a large number of production companies in China; however, only companies that are accredited by SAPPRT are able to co-produce with a foreign partner. It is essential that Chinese partners are properly accredited with the appropriate bodies with equivalent terms of trade.

We have had an office in China for over 10 years with significant time invested in creating a true presence with the flow-on effect of enabling our production business to grow globally.

The broadcast market in China is large and varied, with a huge appetite for domestic programming. International factual programming like natural history, travel and science has proved popular. Large brands are also seeking to partner in factual programming.

Sue Clothier,
Managing Director Northern Pictures,
Australia

Audience tastes and co-production approval process:

Local producers noted that the joint development of scripts is particularly important when working with Chinese co-production partners on feature films as SAPPRT has to assess scripts before principal photography can commence on a co-production. Late changes to the script to meet censorship requirements can unravel the storyline and impact on the quality of the content. Local producers reported that approaching Chinese partners with a completed script is less likely to attract interest than presenting projects where co-development is on offer.



The Story of Australia

Republic of Korea

SNAPSHOT

No. of screens	1,974 (2011) ¹¹
Total box office	US\$1.21 billion (2012) ¹²
Domestic box office share	58.8% (2012) ¹²
No. of domestic films released in cinemas	174 (2012) ¹²
Local content regulation – cinema	Yes
Local content regulation – television	Yes
Number of domestic films produced	[Not available]
TV households	16,595,000 ¹³

Australian producers' perspectives

- 20 per cent of surveyed local producers derived revenue from the South Korean market.
- 27 per cent of local producers expected their revenue from South Korea to expand; 8 per cent expected it to expand significantly
- The factors most commonly perceived as opportunities by the surveyed local producers were the appeal of their content to the South Korean market, presales/sales and co-productions.
- The most commonly cited obstacles to pursuing greater engagement with the South Korean screen industry were difficulty establishing relationships, lack of financial resources to pursue opportunities and lack of knowledge/expertise within their business.

Recent developments

- The IPTV market in South Korea has developed rapidly over the last five years. According to the Korea Digital Media Association, South Korea reached 7 million IPTV subscribers in 2013.¹⁴ The growth of the South Korean IPTV market, which is one of the largest in the world, has been assisted by the country's high broadband penetration and fast Internet speeds.
- The box office share for domestic films has been growing steadily over the past four years, rising from 42 per cent in 2008 to 58 per cent in 2012. 90 per cent of revenue

for South Korean films comes from the box office take, due to a relatively small home entertainment market. In 2012 the DVD market in South Korea totalled US\$35 million and the digital film market totalled approximately US\$150 million, according to IHS Screen Digest.¹⁵

- KOFIC recently introduced a location incentive for foreign feature films and television drama production. KOFIC offers a cash grant of up to 30 per cent on foreign production expenditure incurred for goods and services in South Korea, with a cap of 2.6 billion KRW (approx US\$2.6 million).¹⁶
- In 2013 renowned South Korean director Bong Joon-Ho released his first English language film, *Snowpiercer*. The sci-fi thriller is based on the French graphic novel *Le Transperceneige* and features an international cast including Song Kang Ho, Tilda Swinton and Chris Evans. With a budget of over US\$40 million, *Snowpiercer* is the most expensive South Korean film ever made.¹⁷ *Snowpiercer* has attracted over 9 million admissions at the South Korean box office and has been sold to 167 territories.¹⁸ The Weinstein Co. has acquired rights to the film in the US, Canada, the UK, Australia, New Zealand and South Africa.

Current engagement

Production partnerships with South Korea have been limited to date. However, important ties such as the Asian Animation

Summit do exist, and there are opportunities for the Australian screen industry to leverage existing relationships to stimulate greater collaboration between the two industries.

Screen Australia has been working with the Busan International Film Festival (BIFF) and the concurrent Asian Project Market for around eight years, hosting programmers from the festival as well as providing travel support for selected Australian filmmakers. In 2013, Australian project *End of Animal* was one of 30 official project selections for the project market. Screen Australia works with the Australia-Korea Foundation and the Embassy in their work with BIFF.

South Korean national broadcaster KBS is a member of the ABU alongside the ABC and SBS. KBS has acquired a number of Australian documentaries in recent years including ABC and SBS documentaries and content from Australian distributors.

A range of South Korean productions have done location shooting in Australia, including feature film *A Million*, which was set in the Australian desert, and vampire movie *Thirst* (Park Chan Wook).

OPPORTUNITIES

South Korean Government support: The South Korean Government provides holistic support for the screen industry through direct investment in production, development initiatives, a location incentive and support for export activities. The two national screen agencies are KOFIC and KOCCA. There is also strong regulatory support for the local industry including a screen quota for local films in cinemas and local content regulation for broadcast television.

International expansion: KOFIC has announced its intention to focus on supporting the South Korean screen industry to engage more with international partners. KOFIC has supported the international expansion of the screen industry via a co-production development fund, business matching events and establishing a Film Business Centre in Beijing, amongst other initiatives.¹⁹

South Korean movie studios are reaching out internationally, engaging in co-production and co-financing deals with partners from the US, China, Japan and elsewhere, in order to achieve greater revenue from international distribution.

At the same time foreign movie studios in particular US and Chinese companies are increasingly investing significant amounts in the South Korean film industry.

Feature film: There is a large amount of private investment in the South Korean film production industry, for example from entertainment companies that are integrated with production and distribution divisions. Two of these vertically integrated entertainment companies, CJ Entertainment and Lotte Entertainment, also have a stake in cinema exhibition, running multiplex theatre chains. Telecommunications conglomerates such as SK Broadband and KT have begun making significant investments in film productions in order to acquire satellite broadcast and IPTV rights.²⁰

KOFIC fosters private investment in film production via the Cinema Fund, which provides seed money to various Visual Content Funds managed by venture capital

firms. The Visual Content Funds work as sub-investors serving a significant role as financial investors in South Korean film productions. Generally, they cover up to 40 per cent of the production costs. KOFIC invests about US\$8.9 million per year to stabilise the South Korean film industry.²⁰

Animation: South Korea is the world's fourth largest animation producer, with over 500 animation studios employing approximately 86,000 animation professionals.²¹ In 2013, over 90 per cent of animation production in South Korea comprised fee-for-service for foreign studios. However, the number of original projects produced by South Korean animation studios is rising.²¹ The South Korean animation industry is highly regarded for the quality of its animation and its talent pool.

The South Korean Government supports the production of original animation in a number of ways including a local broadcast content quota, direct investment via KOCCA and the Asian Animation Summit.

The increase in original South Korean animation productions offers an opportunity for Australian producers seeking to co-produce animated projects. South Korean studios are seeking international co-

production partners as it is difficult to raise production budgets from the domestic market alone. The Producer Offset as well as broadcaster licence fees make Australia an attractive partner for animated co-productions. In addition, Australian animation producers' experience in creating content for international markets and access to global distribution networks is highly valued.

Documentary: South Korean public broadcasters Korean Broadcasting System and Educational Broadcasting System and commercial broadcaster MBC are increasingly reaching out to international co-production partners, presenting opportunities for the Australian documentary and factual production sector.

The South Korean and Australian documentary sectors have begun to establish relationships. Events such as Asian Side of the Doc and INPUT as well as MIPCOM and MIPTV have been essential platforms to exchange ideas and discuss content and product with broadcasters. A representative from KBS also attended the Australian International Documentary Conference in 2013.

CHALLENGES

Established industry: The success of the South Korean screen industry has made it an attractive production partner or investment proposition for foreign companies. The presence of Hollywood studios and Korea's growing ties with the Chinese screen industry as well as other countries means that Australian producers seeking to collaborate with South Korean partners face a lot of competition.



Malaysia

SNAPSHOT

No. of screens	754 (2012) ²²
Total box office	US\$185 million (2012) ²²
Domestic box office share	16% (2012) ²²
No. of domestic films released in cinemas	76 (2012) ²²
Local content regulation – cinema	Yes
Local content regulation – television	Yes
Number of domestic films produced	Not available
Domestic film average budget	US\$494,000 (2012) ²²
TV households	5,063,000 ²³
Pay TV households	3,221,000 ²³
Broadband households	1,959,600 ²³

Australian producers' perspectives

- 20 per cent of surveyed local producers derived revenue from the Malaysian market.
- 50 per cent of local producers expected their revenue from South Korea to expand; 7 per cent expected it to expand significantly.
- The factors most commonly perceived as opportunities by the local producers surveyed were co-productions, co-financing and less expensive production or post-production services.
- The most commonly cited obstacles to pursuing greater engagement with the Malaysian screen industry were difficulty establishing relationships, lack of financial resources to pursue opportunities and lack of knowledge/expertise within their business.

Recent developments

- Pinewood Iskandar Malaysia Studios (PIMS) opened in 2013. PIMS was jointly financed by Pinewood Studios Groups and the investment arm of the Malaysian Government, Khazanah Nasional Berhad. The studio was built to serve Malaysian and regional screen productions as well as international productions. PIMS, which cost approximately US\$120 million to build,

features five stages of various sizes, two TV studios and post-production facilities including editing rooms and screening theatres.

- In 2013 the Malaysian Government introduced a 30 per cent rebate on Qualifying Malaysian Production Expenditure for film and television production and post-production. The rebate can be accessed by domestic and foreign productions. The minimum expenditure threshold for domestic productions is approximately A\$800,000 for feature films and A\$64,000 per episode for television productions. Foreign productions must spend approximately A\$1,700,000 for feature films and A\$130,000 per episode for television productions.

Current engagement

The longest standing ties between the Malaysian and Australian screen industries are in the animation sector. There is potential for the Malaysian Government's support for the screen industry to bolster connections with the Australian industry across various sectors.

Collaborations on animated series include *Flea-Bitten*, produced by Vision Animation (Malaysia) and Moody Street Kids (Australia) for Channel Nine, and *CJ the DJ*, also produced by Vision Animation and Kapow Pictures (Australia) for the ABC and Nickelodeon.

In the documentary sector, Queensland/NSW company Wild Fury and Malaysia's Apparat have collaborated on the three-part series *The Coral Triangle*, produced for ZDF and Arte and supported by screen agencies in Australia and Malaysia.

As well as production partnerships, Malaysian subscription broadcaster Astro has acquired Australian content, primarily documentary, factual and children's programs. However, there is a low level of awareness of recent Australian content in Malaysia.

OPPORTUNITIES

Financing: Malaysian Government support for the screen industry presents significant opportunities for the Australian screen industry. The newly introduced 30 per cent rebate will enhance the financial contribution that Malaysian companies bring to production partnerships. In addition, there is a dedicated co-production fund administered by MDEC, MAC3 Co-Pro Fund, designed to help innovative and progressive local companies to co-produce animation and game development projects with reputable international partners. The absence of a co-production treaty does not prohibit Malaysian producers working with Australian partners from accessing this fund.

Private-public partnerships such as Ideate Media, a co-venture between media company Astro and Malaysian Government investment arm Khazanah Nasional, also offer financing opportunities for Australian producers working with Malaysian partners.

Pinewood Iskandar Malaysia Studios:

The technologically advanced studio infrastructure at PIMS, combined with the 30 per cent rebate, makes Malaysia a cost-effective location to undertake studio shoots for Australian productions.

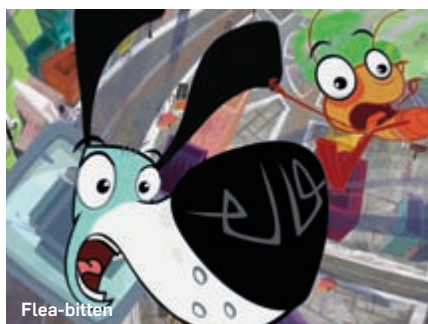
Looking for international partners:

The Malaysian screen industry is actively looking to work with international partners, particularly in the animation production sector.

Mentoring opportunities: The Malaysian Government is supporting the domestic screen industry to increase in size and ambition and to transition from primarily creating content for the domestic market to creating content with international appeal. The Australian screen industry's experience in this area is highly regarded by Malaysian screen industry companies and presents opportunities for the Australian screen industry to provide training and mentoring to Malaysian screen practitioners.

CHALLENGES

Discrepancy in budgets: The average budget for Malaysian film and television projects is much lower than the average budget for an Australian production, particularly for television projects. However, the Malaysian Government has encouraged local producers to work with larger budgets by setting the minimum expenditure threshold for the 30 per cent rebate on domestic productions at a higher level than would usually be spent on a Malaysian project. The discrepancy in budget levels is partly offset by the lower cost of production in Malaysia.



Flea-bitten

Malaysian writers need to develop the skills to tell Malaysian stories in a universally appealing way. Australia has good screenwriting skills and could play a role in training ...

Kamil Othman, MDEC,
Malaysia



The Coral Triangle

Documentary *The Coral Triangle* explores mutually relevant subject matter

Three-part documentary series *The Coral Triangle* is an unofficial Australia–Malaysia co-production. The program follows an expedition around the Coral Triangle marine area, which includes the waters of Indonesia, Malaysia, the Philippines, Papua New Guinea, Timor Leste and the Solomon Islands, to document the beauty and biological importance of the area. The series is presented by prominent Australian divers and shark experts Ron and Valerie Taylor.

The Coral Triangle was supported by Screen NSW and Malaysia's FINAS and was co-produced by Tina Dalton of Wild Fury Productions and Nandita Solomon of Apparat Productions. The production also utilised the services of Malaysian company Scubazoo, which specialises in underwater photography. *The Coral Triangle* will be broadcast by ZDF/Arte and Discovery Asia.

The Coral Triangle was the first production partnership between Wild Fury and Apparat. The two companies are in joint development on a subsequent project.

Singapore

SNAPSHOT

No. of screens	200 (2012) ²⁴
Total box office	US\$150.8m (2011) ²⁵
Domestic box office share	5% (2011) ²⁶
Local content regulation – cinema	No
Local content regulation – Television	No
Number of domestic films produced	15 (2011) ²⁷
TV households	1,154,000 ²⁸
Pay TV households	818,000 ²⁸
Broadband households	1,209,000 ²⁸

Australian producers' perspectives

- 43 per cent of surveyed local producers derived revenue from the Singaporean market.
- 56 per cent of local producer expected their revenue from Singapore to expand; 9 per cent expected it to expand significantly
- The factors most commonly perceived as opportunities by the local producers surveyed were co-financing, official co-productions, the appeal of their content to the Singaporean market and co-ventures.
- The most commonly cited obstacles to pursuing greater engagement with the Singaporean screen industry were lack of financial resources to pursue opportunities, difficulty establishing relationships and lack of knowledge/expertise within their business.

Recent developments

Screen Singapore, a film market and convention, and the Asian Television Forum and Market are now held in conjunction with each other. The inaugural Screen Singapore was held in 2011 and combined with the more established Asian Television Forum and Market in 2012. In addition to the market, the dual event features conferences, networking events and screenings.

Current engagement

The Australian and Singaporean screen industries have strong ties across various sectors. The relationship between the two industries has been spurred by the Australia–Singapore co-production agreement, which came into force in 2008, and the Media Development Authority's active approach to supporting the local industry to work with international partners.

Television drama series *Serangoon Road* is a major collaborative project between the two countries, with significant investment from the MDA and ScreenWest. The series is being broadcast in Australia by the ABC and throughout the region by HBO Asia.

In the feature film sector, IFS Capital has cashflowed the Producer Offset for Australian feature films, and there has been one feature film co-production, *Bait 3D*.

There have been a number of official and unofficial animation co-productions including *Guess How Much I Love You*, *Zigby* and *Milly Molly*. Live action children's series *A Gurls World* also had Australian and Singaporean partners.

OPPORTUNITIES

Many Australian production companies are already realising the benefits of partnering with Singaporean companies. The Singaporean screen industry has developed rapidly over the past 10 years and will continue to build talent and expertise. There will be ongoing opportunities for production partnerships for Australian producers including official and unofficial co-productions, especially in the animation sector.

Government support: The MDA provides strong support for Singaporean production companies working with international partners. Singaporean companies are eligible for grants of up to 40 per cent of the Singapore spend on a television, film, game or interactive media production. To encourage a sustained pipeline of projects, MDA offers a further grant of up to 10 per cent of the Singapore spend of a Singaporean company's current project for its next project.

Regional hub: The regional headquarters of a number of international broadcasters and media companies are located in Singapore, including HBO Asia and Discovery Networks Asia-Pacific.

CHALLENGES

Small broadcast market: Singapore has a small broadcast market and Singaporean broadcasters offer low licence fees. Mediacorp is Singapore's only free-to-air licensee, operating seven free-to-air channels in the four official languages of Singapore. The subscription TV market comprises two nationwide licensees: StarHub, which operates the country's only cable TV service, and SingNet, which offers IPTV channels.



Serangoon Road

Deep engagement from both partners in TV drama *Serangoon Road*

Serangoon Road is an Australia–Singapore television drama co-production produced by Great Western Entertainment and Infinite Frameworks. Set in 1960s Singapore, it tells the story of Australian-born Sam Callaghan (Don Hany), who is approached by his neighbour Patricia (Joan Chen) to help keep her recently murdered husband's private detective agency afloat.

Deep creative and financial input came from both Singapore and Australia, with cast and crew also drawn from other parts of the region. *Serangoon Road* was shot at Infinity Studios on Indonesia's Batam Island and at iconic locations in Singapore, with post-production undertaken in Perth and Sydney. It was supported by Singapore's MDA and ScreenWest, with broadcasters ABC and HBO Asia and distributor Content Television also investing.

Series creator Paul Barron told Singaporean film magazine *F****, "The co-production I think has helped everybody because we've been able to bring together two things: one is the creative resources – the creative resources of Singapore and acting resources from across the region, and our creative resources and then we [were] frankly able to bring together the money." *

Serangoon Road was recognised at the inaugural Australian Arts in Asia Awards, winning the Digital and Film award as well as nominations in several other categories. The series went to air throughout the region on HBO Asia and in Australia on the ABC in September 2013.

* Paul Barron interviewed by Jedd Jong, 2013. 'On the Road: Serangoon Road Set Visit', *F*** Magazine*. March 2013

Indonesia

The Australian screen production industry has seen examples of successful collaboration with Indonesia, India, Japan and Thailand over the course of many years, and there is potential to expand the nature and scope of these relationships.

Engagement between Australia and the Japanese and Indian screen industries has been limited by the strong domestic focus of these markets. However, there are indications that Japan and India are increasingly opening up to international production partnerships and foreign content.

Thailand has a depth of screen production talent and a growing screen sector that is benefitting from increased government activity in terms of promoting and supporting the Thai industry. Indonesia's screen industry is set for significant expansion to serve its huge population and growing middleclass.

With a coordinated and sustained approach, these territories will become increasingly important for the Australian screen production industry.

SNAPSHOT

No. of screens	675 (2012) ²⁹
Total box office	US\$150m ³⁰
No. of domestic films released in cinemas	90 (2012) ³¹
Local content regulation – cinema	No
Local content regulation – television	No
Number of domestic films produced	80-90 ³²
TV households	41,871,000
Pay TV households	1,226,000
Broadband households	1,898,200

The Australian screen sector's engagement with Indonesia to date has been primarily through location shoots in Indonesia, for the most part comprising documentary projects addressing Indonesian subject matter. The Bali Film Commission has assisted a number of Australian productions to shoot in Bali including an upcoming observational documentary series about Australians living in Bali and documentary *The Coral Triangle*.³³ Australian drama projects that have shot in Indonesia include *Serangoon Road*, which used Infinity Studio on Batam Island, and Australia-Germany co-production *At World's End*.

Several trends in the Indonesian screen sector point to opportunities for greater engagement. In the animation sector there has been significant government investment in vocational training and Indonesia offers an economy of scale for Australian productions. Training and information exchange including sharing of Australian skills and expertise would be valued by the Indonesian sector.

The scale and ambition of Indonesian feature films is increasing, evidenced by the growing number of Indonesian projects doing location shoots in Australia. However, there remains a large disparity between the average budget of an Indonesian feature and an Australian feature. Indonesia consistently produces 80-90 feature films annually, without government investment. The recent success

of action film *The Raid*, which had a budget of US\$1.1 million and grossed over US\$4 million at the US box office alone, has raised the international profile of the Indonesian film production sector.³⁴ A sequel to *The Raid* is currently in production, and Screen Gems, a subsidiary of Sony Pictures, has acquired the remake rights.

The Indonesian market is currently 'under screened' with only 696 screens for over 242 million people. However, investment in the theatrical exhibition sector is growing. An expanding number of screens combined with a growing middle class signal potential for major growth in the feature film market in Indonesia.

For the documentary sector the shared history and ties between Indonesia and Australia, explored in Australian documentaries such as *Indonesia Calling: Joris Ivens in Australia* and *Bali High Wedding*, provide a fertile source of screen stories. The proximity of Western Australia and the Northern Territory to Indonesia is an advantage for their local screen industries.

There was some discussion late last year of the establishment of an Indonesian Film Council, independent of government, to review film policy and establish support programs for local film. Screen Australia is not aware of any further progression on this issue to date.

India

SNAPSHOT

No. of screens	Approx. 10,000 ³⁵
Total box office	US\$1.4 billion ³⁶
Domestic box office share	91.5% (2012) ³⁷
Local content regulation – cinema	No
Local content regulation – television	No
Number of domestic films produced	1602 (2012) ³⁸
TV households	143,216,000 ³⁹
Pay TV households	102,445,000 ³⁹
Broadband households	11,464,700 ³⁹

A significant point of connect between the Australian and Indian screen industries is location shooting; a consistent number of Indian feature films are undertaking location shoots in Australia. Recent Australian projects shot in India include feature films *Save Your Legs* and *The Waiting City* and documentary series *Dumb, Drunk and Racist*.

An example of collaboration between the two industries is Tasmania-based Blue Rocket and Indian studio Criya's work on animated children's series including the upcoming *Buzz Bumble*; pre-production is performed in Tasmania while production is undertaken in India.

FICCI Frames and the Goa Film Bazaar provide important platforms for Australian producers to establish relationships with the Indian screen industry. There has been an annual Australian presence at FICCI Frames and Goa Film Bazaar since their inception, including delegations supported by Screen Australia. SPAA and Ausfilm have also supported industry events in India.

India and Australia do not currently have a co-production treaty, although negotiations are underway. The lack of a co-production treaty presents a challenge for Australian producers raising finance for a co-production with India as they may not be able to access government funding. There is little government investment in the Indian film industry, so official co-production status would not necessarily help Indian producers raise finance.

While India has a very strong domestic production industry, there are opportunities for Australian content to reach Indian audiences. For example horror film *Black Water* performed well in the home entertainment market (creature features were popular at the time) and Australian television programs including *Addicted* and *Packed to the Rafters* have aired on subscription television. The growing number of arthouse cinemas and the proliferation of television channels following the switch to digital transmission will provide opportunities for Australian content to reach niche audiences in India.



Working with India on children's animation *Buzz Bumble*

Tasmania-based company Blue Rocket and Indian production company Criya have partnered to produce preschool animation series *Buzz Bumble* (currently in production). The project is supported by Screen Tasmania and is the first co-production between a Tasmanian and an Indian company. The Tasmanian Government has announced that the production is expected to create 28 local jobs and inject \$2.3 million into the local economy.*

Buzz Bumble follows the misadventures of a 'not too smart' performing bee named Buzz Bumble and his troupe of bee grade actors as they attempt to perform a comedy musical variety show.

The series will be broadcast in Australia on the Nine Network and sold internationally by Bejuba Entertainment in Los Angeles.

* Lara Giddings, 2013, *Tassie screen company in partnership with India*, www.premier.tas.gov.au/media_room/media_releases/tassie_screen_company_in_partnership_with_india

Japan

SNAPSHOT

No. of screens	3,290 (2012) ⁴⁰
Total box office	US\$2.5 billion (2012) ⁴¹
Domestic box office share	65.7% (2012) ⁴²
No. of domestic films released in cinemas	554 (2012) ⁴²
Local content regulation – cinema	No
Local content regulation – television	No
TV households	46,583,000 ⁴³
Pay TV households	33,137,000 ⁴³
Broadband households	34,096,900 ⁴³

• We share a similar cultural background as countries living in the Asia-Pacific. The recent two (Australian) titles we bought for World Documentary are both related to Myanmar, and as it clearly shows, we have the same regional interests, and Australia is strong in special access to this region.

Sayumi Horie, NHK, Japan

Exchange between the Australian and Japanese screen industries has primarily centred on location shooting and acquisition of completed programs, with crews and content flowing in both directions. One of the reasons for the limited engagement between the two industries is that the Japanese screen industry has traditionally been primarily focused on the domestic market. However, the Japanese screen industry is becoming more internationally focused.

In the past sales of Australian broadcast content to Japan have predominantly been involved documentary programs.

Recent Australian documentaries aired by Japan's public broadcaster include *Miss Nikki and the Tiger Girls*, *Dancing with Dictators* and *Possum Wars*. ABC Commercial reports that sales of broadcast content to Japan are diversifying, including sales of Australian lifestyle programs to the territory.

Documentary co-production or co-financing is one area with potential for greater collaboration between Australia and Japan. One platform for facilitating business between the two industries is the Tokyo TV Forum, which held its inaugural event in 2011. The forum was established to provide a platform for Japanese documentary producers to pitch projects to potential international partners including co-production partners. The Japanese stakeholders interviewed for this report stated that documentary subject matter that would be of interest to Japanese audiences or co-production partners includes content that focuses on countries in the Asia-Pacific, environment issues and energy issues.

For feature film producers, the Japanese film market TIFFCOM, run in conjunction with the Tokyo International Film Festival, holds an annual forum to facilitate co-productions with Japanese partner, TIFFCOM Co-Pro Connection.



Thailand

SNAPSHOT

No. of screens	Approx. 800 ⁴⁴
Total box office	US\$152.6 million (2011) ⁴⁵
Domestic box office share	37.5% (2008) ⁴⁵
Local content regulation – cinema	No
Local content regulation – television	No
Number of domestic films produced	53 (2011) ⁴⁵
TV households	15,560,000 ⁴⁶
Pay TV households	1,315,000 ⁴⁶
Broadband households	2,716,400 ⁴⁶

A number of Australian documentaries have shot in Thailand as well as some Australian feature films. Beyond this, there has been limited exchange between the Australian and Thai screen industries and there is a low level of awareness of Australian content in Thailand. A recent exception is *Junior MasterChef Thailand*, which premiered on Thai television this year and has proved a hit with audiences. *Junior MasterChef Thailand* is based on the Australian format, produced by FremantleMedia Australia.

While Australian content is not well known in Thailand, Australian actors such as Nicole Kidman and Hugh Jackman are popular with

Thai audiences and Australian pop singers such as Kylie Minogue have large fan bases.

Despite the limited engagement to date, there are opportunities for partnerships between the two industries. The Thai industry has a large talent pool and strong ties with neighbouring screen industries. The main obstacle to greater engagement is the lack of established relationships between the Australian and Thai screen industries. The upcoming Asian Animation Summit in Phuket is an opportunity for the Australian and Thai animation sectors to form relationships and for further government-to-government contact to broaden the relationship.



Miss Nikki and the Tiger Girls



Appendix

Current engagement and support mechanisms

Co-productions

The Australian International Co-production Program facilitates cultural exchange and strengthens diplomatic ties between countries with the objective of opening up new markets for Australian films and increasing the diversity of films brought to Australia. The program also reduces the financial risk for Australian producers through the sharing of equity investment between countries, thus encouraging the production of high-quality work.

Australia holds film co-production treaties with Singapore and China. Under these agreements, in place since 2008, Australia has co-produced three feature films worth \$45 million with China and five projects worth \$45 million with Singapore. These include *Bait 3D* and *Children of the Silk Road*, as well as the television drama *Serangoon Road*, currently screening on the ABC.

Negotiations for audiovisual co-production treaties with Malaysia, India and the Republic of Korea are also underway.

Cultural diplomacy and trade initiatives

Screen Australia and the Department of Foreign Affairs and Trade continue to work closely together to enhance Australia's presence in foreign markets. One recent example is the program of co-funded travel grants to the Asian Animation Summit in December 2013 (see 'Events in the Asian region' page 27). This is in addition to other travel support programs offered by Screen Australia.

Screen Australia also seeks to strengthen the profile of Australian film and television under the umbrella of the Australia International Cultural Council's (AICC) 'focus countries' program. Recent countries have included China (2010), Republic of Korea (2011), India (2012) and Vietnam (2013). Indonesia is the focus country in 2014.

Austrade, through its business support program, offers creative businesses such as those in the screen sector, services to enter international markets.

Government agency relationships

As the Australian Government's key screen industry support agency, Screen Australia has relationships with other government agencies across the region, including:

- Singapore's Media Development Authority (MDA)
- the Korean Creative Content Agency (KOCCA)
- Malaysia's Multimedia Development Corporation (MDEC) and National Film Development Corporation (FINAS)
- China's State Administration of Press, Publications, Radio, Film and Television (SAPPRFT), the China Film Co-Production Corporation and the Shanghai Film Group.

These relationships have been strengthened over time, with Screen Australia hosting visits from delegations to Australia as well as taking Australian delegations overseas. For example, representatives from MDEC and FINAS have visited Screen Australia twice over the past year and SAPPRFT has visited every two years.

Screen Australia funding programs and resources

Enterprise Asia is a recent initiative of Screen Australia to promote business-to-business links in the region by leading and supporting delegations of Australian producers to key Asian markets. The program aims to benefit companies entering new growth markets in the Asian region by creating opportunities to gain detailed insights into government requirements, incentives, marketplace engagement, content and business approaches.

Screen Australia also provides **travel grants** for producers to attend leading festivals and markets across the region, including the Busan International Film Festival and the Asian Project Market in South Korea, and the annual Asian Animation Summit, to be held in Thailand this year. Such forums enable producers to increase recognition of their product, thus building their track record with potential partners, whilst the presence of screen agencies reinforces government support in this area.

More than half the Australian producers surveyed for the *Common Ground* report said they had received assistance from Screen Australia to undertake activities in the focus countries, with almost as many also receiving assistance from the state agencies.

Coupled with its support for producers to attend international markets, Screen Australia publishes *Doing Business with Australia*, a resource for international producers considering working in Australia or with Australian screen practitioners. Marketing collateral providing details of companies and their projects is also produced for each market, summit or country delegation visit. This complements the networking and matchmaking events organised by Screen Australia for Australian producers looking to work with Asian region partners.

National broadcasters: the ABC and SBS

Australia's public broadcasters are proactively building their relationships with broadcasters across the Asia-Pacific. The ABC was one of the initiators of the Asian Animation Summit. Both broadcasters continue to strengthen ties in the region by regularly attending markets such as the Asian Side of the Doc. By doing so, they are enabling opportunities for co-commissioning while raising awareness of Australian content through their sales and marketing divisions.

The Australia Network is also taking an active role in facilitating partnerships in the region.

Other agencies

Ausfilm plays a role in building relationships across the region through its advocacy for the Australian production sector in order to attract inbound productions to Australia. Ausfilm representatives have attended the Singapore TV Forum/Screen Singapore and the agency was a partner in the Australia China Film Industry Forum.

State screen agencies support producers to develop their businesses and seek out opportunities to work across the region where appropriate. This support includes travel grants of generally up to \$5,000 to producers to attend international festivals

and markets. Whilst eligible events differ from state to state, examples of some events include the Asia TV Forum/Screen Singapore, FICCI Frames (India), Busan International Film Festival, and the Hiroshima Animation festival (Japan). State agencies have also provided mentor support for less experienced producers on delegations.

Some state agencies have piloted programs aimed particularly at strengthening ties between Australia and Asia. For example:

- ScreenWest ran a Cross-Media Development Initiative with MDA which encouraged Western Australian and Singaporean production companies to co-develop visual narrative concepts for emerging new media channels including interactive television, web and mobile devices.
- The Film Victoria-funded Victoria/India Co-production initiative aimed to foster relationships and encourage co-production or joint venture partnerships between the Victorian and Indian film and television industries. Funding was initially provided to a delegation of producers to attend the FICCI Frames Conference in March 2012 and this was followed by funding to those producers who found an Indian-based production partner to develop a co-production. Film Victoria also supports the annual Indian Film Festival Melbourne, which hosts prominent Indian filmmakers and screen professionals and provides master classes, in addition to its screening program.

Further support is provided by the **Asia Pacific Screen Academy (APSA)**, a body established in 2008 to promote the cinematic excellence and cultural diversity of the Asia Pacific region, as well as encourage dialogue, collaboration and business opportunities for the region's filmmakers. The annual Asia Pacific Screen Awards is APSA's principal activity, and the awards are growing in brand awareness and prestige each year with a membership of over 600 members from 69 countries and increasing each year by around 100. Through the sidebar events it holds alongside the awards ceremony and other activities throughout the year, APSA is expanding its relationship with production companies from Australia and its international partners.

EVENTS IN THE ASIAN REGION

Some of the many major film events and markets attended by Australian producers in the Asian region are:

Australia China Film Industry Forum (ACFIF):

An initiative of the Australian Embassy in Beijing, the inaugural ACFIF was held during the year of cultural exchange with China (*Imagine Australia*) in 2010, with successive forums held in April 2012 and June 2013. Screen Australia worked closely with the Embassy, state and federal agencies and key Australian and Chinese industry guilds and organisations to stage two days of networking, information sessions and business meetings for a delegation of Australian producers.

Outcomes from the forum included the establishment of tangible partnerships resulting in documentary and feature co-productions and the Australia-China Screen Alliance. The forum continues to be a successful example of inter-governmental and industry collaboration providing valuable opportunities to Australian producers to pitch co-production projects as well as develop relationships with potential co-producing partners.

Asian Animation Summit (AAS):

The AAS is an annual event designed to showcase Asia's strongest animated projects looking for investors and partners, and to stimulate co-production and co-financing of animation in the region. It is an initiative of Australia's ABC TV and Screen Australia, Korea's KOCCA, Malaysia's MDeC and Singapore's MDA. Each of these countries' screen agencies will provide financial support for producers whose projects are selected to join

the Summit's presentation program. AAS aims to facilitate international financing and co-production connections for projects from the region.

Asian Side of the Doc:

Asian Side of the Doc is a development, sales and networking event that brings together documentary producers, distributors, broadcasters and government from across the Asia-Pacific and beyond with a particular emphasis on creating a marketplace that services and reflects the needs of the region. In 2013, 500 delegates from 42 countries attended the event in Kuala Lumpur, considerably more than the previous year. Australian production company Wild Fury participated in the Docs in Progress Showcase with its three-part series *The Coral Triangle*, a co-production with the Malaysian Apparatus Productions and supported by FINAS. Screen Australia gave a keynote presentation in the government sidebar, a gathering of representatives from government agencies across the region to discuss opportunities for collaboration.

Busan International Film Festival:

The Busan International Film Festival is an annual 10-day film festival that began in 1996. It is now one of the largest film festivals in Asia with an audience of more than 220,000 in 2012. The festival is complemented by the Asian Film Market which is a key marketplace for Asian film business, hosting 181 companies from 32 countries in 2012.

FICCI Frames:

FICCI Frames is the largest media and entertainment conference in Asia. Held annually in Mumbai, India, and organised by the Federation of Indian Chambers of Commerce (FICCI), it is a three-day global convention covering the media and entertainment: film, broadcast (TV and radio), digital entertainment, animation, gaming and visual effects. It offers a good snapshot of the Indian industry, with well over 2,000 Indian and foreign delegates attending each year.

Hiroshima Animation Festival:

Established in 1985, HIAF is a competitive biennial festival focusing on progressing animation in the Asia and Pan-Pacific regions. Each year, it screens 1,200 titles over a five-day period.

Goa Film Bazaar: Organised annually alongside the International Film Festival of India (IFFI) at the Goa Marriott Resort, the Goa Film Bazaar is a significant event on the South Asian calendar, where delegates buy, sell, exhibit and pitch their content. Six hundred and thirty-five delegates from across 40 countries attended the 2011 Goa Film Bazaar with country delegations from Canada and Israel.

Hong Kong Filmart: More than 1,000 trade buyers from over 40 countries and regions meet at Filmart annually to develop partnerships, conduct business deals and discuss latest market trends. Filmart has evolved from a market on film/television programs to a comprehensive, one-stop marketplace for the entertainment industry, from pre-production to production and post-production services and hardware. Running alongside Filmart is the co-production market, the Hong Kong-Asia Film Financing Forum.

METHODOLOGY

Screen Australia commissioned PwC to survey Australian production businesses with experience working with the region in the last five years. The list of businesses was compiled by Screen Australia using information from our production databases. Surveyed producers were asked about the nature and scope of their current engagement in the region, what they perceived as the opportunities and challenges presented by each territory as well as the amount of revenue currently derived from each of the focus countries as a proportion of their total income and revenue expectations for the next three years. PwC conducted follow up interviews with a select number of producers identified as having specific experience with one or more of the focus countries to discuss their experience in-depth.

Screen Australia interviewed industry players from across the focus countries including representatives from screen agencies, broadcasters, production companies and other industry organisations. The interviews assisted Screen Australia to identify opportunities for greater engagement with the focus countries across a range of screen production sectors. Regional interviewees were asked about their experiences working with Australian partners and their perception of the strengths of the Australian screen industry, as well as any obstacles to working with Australian partners, the market for Australian content in their territory and industry trends in their territory.

Screen Australia also interviewed Australian broadcasters, screen agencies and other relevant local stakeholders to enhance our understanding of the current level of interaction with the region and support for producers to engage with the focus countries.

ORGANISATIONS INTERVIEWED FOR THIS REPORT

Australia

ABC
ABC Commercial
Asia Pacific Screen Academy
Australian Directors' Guild
SBS
Australia Network
ScreenWest
Screen Territory
Screen Queensland
Screen ACT
Film Victoria
Screen NSW
Screen Producers' Association of Australia
Screen Tasmania
South Australia Film Corporation
Ausfilm
Austrade
Temple Casting
Money Penny
Media Entertainment and Arts Alliance
AMPCO Films
Bearcage
Beyond
Chocolate Liberation Front
Essential Media
Flame Distribution
Great Western Entertainment
Northern Pictures
Portal Pictures
SLR Productions
Wild Fury
WTFN

Malaysia

Multimedia Development Corporation (MDeC)
National Film Development Corporation (FINAS)
Pinewood Iskandar Malaysia
Ideate Media
Astro Shaw
Apparat Productions
Al Jazeera Asia Pacific

China

CCTV9
China Film Co-production Corporation
Shanghai Media Group
Rare Media
State Administration of Press, Publications, Radio, Film and Television (SAPPRFT)

India

National Film Development Corporation
Celebrity Films
FICCI Frames
AETN18 Media Private Limited

Thailand

Thai Animation and Computer Graphics Association
National Federation of Thai Film Associations

Singapore

IFS Singapore
Media Development Authority (MDA)

Indonesia

Castle Productions
Maxima Films

South Korea

Korea Creative Content Agency (KOCCA)
Korean Broadcasting System (KBS)
SAMG Animation

Japan

Nippon Hōsō Kyōkai (NHK)
Tokyo Docs

ABBREVIATIONS & ACRONYMS

ABC	Australian Broadcasting Corporation
ABU	Asia Pacific Broadcasting Union
ACFIF	Australia China Film Industry Forum
ACTF	Australian Children's Television Foundation
APSA	Asia Pacific Screen Academy
CCTV	China Central Television
DFAT	Department of Foreign Affairs and Trade
FINAS	National Film Development Corporation, Malaysia
IPTV	Internet Protocol Television
KBS	Korean Broadcasting System
KOCCA	Korean Creative Content Agency
KOFIC	Korean Film Council
MBC	Munhwa Broadcasting Corporation
MDA	Media Development Authority, Singapore
MDeC	Multimedia Development Corporation, Malaysia
NHK	Nippon Hōsō Kyōkai (Japan Broadcasting Corporation)
PDV	Post, Digital and Visual Effects
PIMS	Pinewood Iskandar Malaysia Studios
SAPPRFT	State Administration of Press, Publications, Radio, Film and Television, China (previously known as SARFT)
SBS	Special Broadcasting Service

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