



Friends with benefits

A report on Australia's International
Co-production Program



Australian Government



**Australia's co-production program has resulted
in 132 co-productions to date.**

**Canada, the UK and France
represent the highest level of activity.**

**Feature films make up the largest proportion
and have been the most consistently produced format.**

**However, children's programs – animation in
particular – have increased since the mid-1990s.**



Australian Government



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ISBN: 978-1-920998-18-9



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Screen Australia is grateful to all those that contributed data to the compilation of this report. The data provided in this survey has been drawn from a number of sources. Screen Australia has undertaken all reasonable measures to ensure its accuracy and therefore cannot accept responsibility for inaccuracies and omissions.

Cover picture:

Bright Star (feature, Australia/UK) screened in Competition at Cannes in 2009, and had multiple international festival screenings including Pusan, Telluride and Toronto. It was nominated for Best Film at the London Film Festival, won three AFI Awards, and an Oscar® nomination for Best Costume in 2009. It went on to make 54 international sales.

Contents

OVERVIEW	3
WHY CO-PRODUCE?	4
The opportunities	4
The challenges	5
TRENDS IN CO-PRODUCTIONS	6
Looking back: international co-productions in Australia	6
By format	8
TV programs: children's vs adults'	10
Co-productions as part of the Australian production landscape	11
Budget ranges	12
International release of feature co-productions	12
A closer look: co-productions by partner country	13
Balancing financial and creative contributions	14
A SUMMARY OF AUSTRALIA'S CO-PRODUCTION PARTNERS	16
PARTNER PROFILES	18



THE RAILWAY MAN (feature, Australia/UK) commenced production in May 2012. Shooting in Australia, the UK and Thailand throughout 2012, the film is due for release in 2013.



THE SADDLE CLUB

The first two series of *The Saddle Club* (children's TV drama, Australia/Canada) were made in the early 2000s, with a third series returning in 2007 due to popular demand. The series has screened throughout Europe and North America, as well as on Australian free-to-air and subscription TV, and has generated sales of videos, music CDs and other merchandise.

KEY TERMS

- An **Australian co-production** is a project that has received approval by both Screen Australia and the relevant foreign competent authority, as having complied with the provisions of the co-production arrangement (treaty or memorandum of understanding) between Australia and the co-producing country.
- A **treaty** is a formal arrangement between the governments of two or more countries.
- A **memorandum of understanding (MOU)** is an arrangement between governments or government agencies of two or more countries. While an MOU has less-than-treaty status, in Australia in the context of film co-productions, it has the same practical and regulatory effect as a treaty.
- **Competent authority** means the authorities designated as such by the Australian Government (Screen Australia) and by the foreign government of each co-production country (listed on page 16). The competent authority in each country administers that country's co-production program.
- A **feature film** is a film made for cinema release which is 60 minutes or longer, including animated features but excluding feature documentaries (see below).
- A **TV drama** is a live-action drama program for adults or children, including series, mini-series and telemovies. Excludes animated TV drama (see below).
- **Animation** is an animated production made for television. Excludes animated features which are included with feature films (see above).
- A **documentary** is a program that is a creative treatment of actuality other than a news or current affairs, sports coverage, magazine, infotainment, or light entertainment program. Includes documentaries made for both television and cinema release.
- Analysis of **total number** and **total budgets** includes all projects that started shooting during the financial year, with the full budget allocated to the date principal photography starts; budgets are not apportioned across the duration of the project.

METHODOLOGY

- This publication reports on the production of feature films and TV programs that have been approved by Screen Australia as co-productions through the International Co-production Program.
- Figures are reported by the financial year in which production commenced.
- It includes projects that have received provisional approval only.
- It excludes projects that had not commenced principal photography by 17 May 2012, and are unlikely to commence before 30 June 2012.
- Information on international partner countries has been gathered from a range of sources (see list below), verified

and updated where possible by contacts at the relevant competent authorities (as listed in table on page 16).

- Commentary was informed by interviews with Australian producers with experience in international co-productions. Screen Australia would like to thank the following people for their assistance: Denise Anderson, Mario Andreacchio, Sasha Burrows, Gillian Carr, Kate Christiansen, Stu Connolly, Justine Flynn, Alan Harris, Chris Hilton, Simone Nicholson, Suzanne Ryan, Emile Sherman and Avriil Stark.
- Sources for information on international partners: *Berlinale Co-production Market Project Catalogue 2012*; *Cannes Film Market – Funds Book 2011*; *Cannes World Film Market Trends 2012*, *CIA World Factbook*; Council of Europe website; Eurimages website; European Audiovisual Observatory (Susan Newman and KORDA database); German Federal Film Board; *PwC Outlook – International Edition*; *Screen Digest*; *Screen International Soft Money Guide 2010*; *TBI Yearbook 2012*.
- Further information on Australia's International Co-production Program available at: www.screenaustralia.gov.au/coproductions
- Figures on total Australian drama and documentary production are at: www.screenaustralia.gov.au/research/prod_industry.aspx
- All figures in Australian dollars except where specified.

Friends with benefits: A report on Australia's International Co-production Program, analyses the activity of the Australian co-production program since its inception in 1986, and explores the opportunities and challenges of international co-productions for Australian producers. It also presents information on Australia's 11 international co-production partners, including factors influencing their patterns of activity with Australia and within the international co-production landscape more generally.

Overview

Australia is part of a network of countries that provide formal arrangements to enable films and TV programs to be officially co-produced between two or more countries. These formal arrangements may take the form of a treaty or a memorandum of understanding (MOU).

All references to co-productions throughout this report refer to 'official' or 'treaty' co-productions made through these formal arrangements.

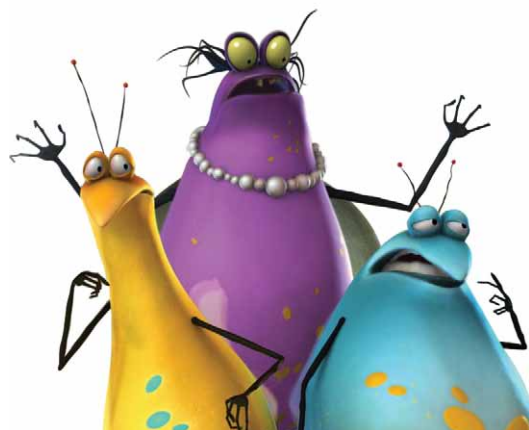
Governments in many countries have negotiated international co-production treaties for economic, cultural and diplomatic purposes. By uniting two countries with similar objectives, co-productions create benefits for both partners. They can provide a means to produce content of a quality and scale to compete in the international marketplace with US programming, particularly for those countries with small local production industries.

This is achieved primarily through the sharing of costs via access to funding from all participating territories. Co-productions also facilitate wider distribution of content to multiple markets, and have the potential to foster creative collaborations and encourage long-term international relationships between producers.

Since Australia's International Co-production Program began in 1986, treaties and partnership agreements have been signed with 11 countries. The longest-running agreements are with France (the first to be signed), the UK and Canada. The most recent agreements are with China (2006), Singapore

(2007) and South Africa (2010). To date, the program has resulted in **132 co-productions**. Australia is currently negotiating co-production treaties with India, Denmark, Malaysia and the Republic of Korea.

The benefits of international co-productions vary, depending on the partner country's available funding, areas of expertise and treaty guidelines. In order to achieve co-production status, a film or program needs to comply with the terms of the relevant co-production arrangement, with approval granted from each participating country. Each country has a 'competent authority' responsible for assessing and approving projects as co-productions, in accordance with the requirements set out in the agreements. Screen Australia is the competent authority responsible for administering the International Co-production Program in Australia.



ERKY PERKY

There have been three series and 78 episodes of *Erky Perky* (children's animation, Australia/Canada). It has been nominated for awards at Stuttgart Festival of Animated Film, Banff World Television Awards, Chicago International Children's Film Festival and Prix Jeunesse International.

ABOUT THE REPORT

Compiled by Screen Australia's Strategy and Research Unit, using data collected in the administration of the co-production program, and incorporating production data gathered through contact with production companies, producers, competent authorities in partner countries (see 'Key terms' page 2), and from publicly available sources.

Why co-produce?

For producers, international co-productions present both opportunities and challenges.

THE OPPORTUNITIES

The most significant advantage of co-productions is the access to extra finance that the structure offers. By qualifying as a co-production, a project is automatically classified as a national production in each of the participating countries. This opens up access to government funding in each territory, both direct (government investment, grants and loans) and indirect (incentives such as tax credits and rebates), which is often restricted to national films and programs. Access to additional finance can enable producers to work with larger budgets than might be possible on a domestic project, and/or can ease the burden on each producer to raise large amounts of finance, by splitting the costs of production.

Co-productions also provide Australian producers with an entrée into the international market, creating visibility to audiences in partner countries. Additionally, a project sold in two territories can inspire a confidence that a single territory sale may not, encouraging further sales to broadcasters or distributors elsewhere. Australian producers who deliver co-productions to broadcasters or distributors in their partner country (and beyond) may find subsequent sales of domestic programs to those markets easier.

Due to the collaborative nature of co-productions, they naturally draw on a wider pool of talent, taking advantage of the special skills, expertise or industry infrastructure available in each participating country. A producer may choose to make a co-production in order to access facilities or skills that are not available within the Australian industry at a suitable scale, with the added potential to expand the range of experience for the Australian personnel involved. For less experienced producers, working as a minority partner on a co-production can provide an opportunity to broaden and develop experience on an international scale.



ORANGES AND SUNSHINE

Oranges and Sunshine (feature, Australia/UK) screened at several international festivals including Rome and Pusan. It won two IF Awards and one AACTA Award, and was the 3rd top Australian film at the Australian box office in 2011.

A NATURAL FIT

The feature film *Oranges and Sunshine* illustrates the 'natural fit' of some projects as international co-productions. The story takes place in both the UK and Australia, requiring casting in both countries. Shooting in both territories allowed for creative input from both Australia and the UK – the director and writer were both from the UK, and the DOP, editor, production designer and composer were Australian. All of these factors contributed to the success of the co-production and ensured requirements of both partner countries were met.



THE DRAGON PEARL

The Dragon Pearl (feature, Australia/China) opened on 3,500 screens in China in 2011.

THE CHALLENGES

Co-production agreements are inherently complex, and not all projects are suited to the co-production model. The need to comply with two countries' sets of requirements in balancing financial elements as well as creative participation means that only a project that works intrinsically as an international collaboration will work as a co-production.

Each country employs a verification method to approve co-production projects. While Australia's test is mathematical, relying on a balance in the calculation of percentages and creative points, partner countries may employ different methods of calculating their country's minimum shares, or place different values on creative roles. This can create challenges in allocating finance and production splits that comply with both partners' requirements.

There can also be challenges in coordinating Australia's industrial and funding systems with those of another country, and projects need to satisfy the audience tastes and markets of both territories, which can have an impact at the script stage. Currency exchange rates can work both ways, with a high Australian dollar making it easier to raise the Australian portion of the budget and

maximise advantages associated with Australian expenditure, but also increasing all the costs on the Australian side. Fluctuations during the course of production can challenge adherence to budgets set out at the start. All of these factors, plus travel, translation (where relevant) and the logistics of operating in different time zones can add significant administrative and legal costs to co-productions.

On certain projects, Australian producers may be able to attract sufficient foreign finance without needing to initiate a co-production with the contributing country. This type of foreign investment generally comes via foreign distributors or broadcasters investing in or pre-buying the project for release in their market, but could also include tax incentives related purely to production activity (in the same way that Australia's Location and Post, Digital and Visual Effects (PDV) Offsets are available to foreign productions undertaking activity here). In these cases, and where the challenges of establishing a co-production outweigh the benefits, Australian producers may favour producing a domestic project with foreign 'co-financing'.

Trends in co-productions

The last 10 years have seen an average of seven co-productions commencing production each year, compared to four per year in the first 16 years of the program.

LOOKING BACK: INTERNATIONAL CO-PRODUCTIONS IN AUSTRALIA

Since the introduction of the program in 1986, co-production activity in Australia has grown steadily. The last 10 years have seen an average of seven co-productions commencing each year, compared to four per year during the first 16 years of the program.

The first high point in activity occurred in 1990/91, with six titles going into production. Four of these were co-productions with Canada, following the signing of the Australia/Canada agreement in 1990.

Activity fluctuated over the following decade, with the annual number of productions ranging from just one in 1993 to nine in 2000/01. A strong upswing in activity occurred in 1999/00 and 2000/01. This period saw a diverse range of formats produced with a number of partner countries, including feature films (*Charlotte Gray* with the UK, *The Old Man Who Read Love Stories* with France), TV series (*BeastMaster* and *Sir Arthur Conan Doyle's The Lost World* with Canada), children's programs (*Old Tom*, *Wicked!* and *Wheel Squad* with France, the first series of *The Saddle Club* with Canada) and documentaries (*Hacktivists* and *Robert Fortune: The Tea Thief* with France, *Quest for Gold* with the UK).

This period of activity was almost certainly impacted by the Australian dollar dropping to around 50 US cents. It should be noted that while the period between 1999 and 2001 did not represent the highest **number** of co-productions made on an annual basis to date, it did account for the highest levels of **total budgets** for co-productions, which peaked at \$117 million in 1999/00 (\$179 million in 2011 dollars). This can mainly be attributed to multiple seasons of *BeastMaster* and *Sir Arthur Conan Doyle's The Lost World* being produced during this period, both were high-budget productions, attracted by the low Australian dollar.

From 2001 to 2006, co-production levels fell, before reaching a peak of 11 projects in both 2006/07 and 2007/08. Australia/Canada co-productions, mostly children's animation, contributed the bulk of projects made during this time, with titles such as *Zeke's Pad*, *Pearlie* and *Dex Hamilton: Alien Entomologist*. Total budgets were also boosted by high-budget features including *Death Defying Acts* (Australia/UK), *The Children of the Silk Road* (Australia/Germany/China) and *Bright Star* (Australia/UK).

The most recent years have seen a drop-off from this peak, although 2009/10 was relatively strong with eight projects starting production, mainly feature films. The latest co-productions to have commenced shooting include *Two Mothers* (Australia/France) and *The Railway Man* (Australia/UK).

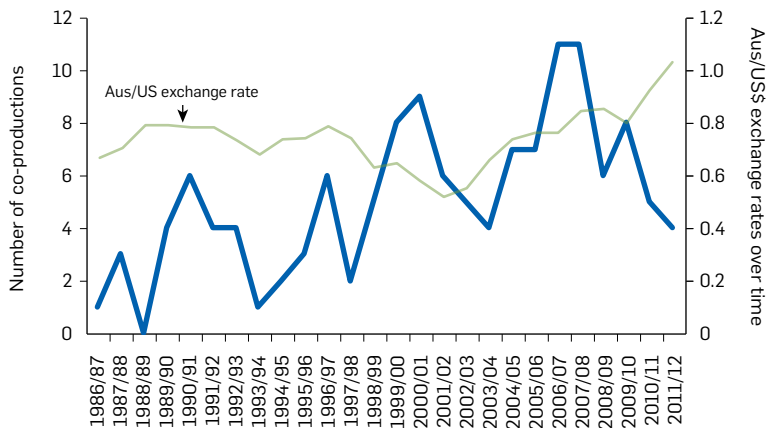
TOTAL NUMBER OF AUSTRALIAN CO-PRODUCTIONS, BY COUNTRY AND FORMAT TO 2011/12

	ANIMATION	DOCUMENTARY	FEATURE	TV DRAMA	TOTAL NUMBER ¹	TOTAL BUDGET BY COUNTRY (\$m) ¹
Canada	15	6	7	14	42	431
China	0	0	3	0	3	45
France	8	8	11	2	29	227
Germany	0	1	4	1	6	41
Ireland	0	1	0	2	3	22
Israel	0	0	1	0	1	nfp
Italy	0	0	1	0	1	nfp
New Zealand	1	0	4	4	9	45
Singapore	2	1	1	0	4	32
South Africa	0	0	0	0	0	-
United Kingdom	1	5	22	11	39	453
TOTAL NUMBER¹	26	22	51	33	132	
TOTAL BUDGET BY TYPE (\$m)¹	207	35	595	403		1,241

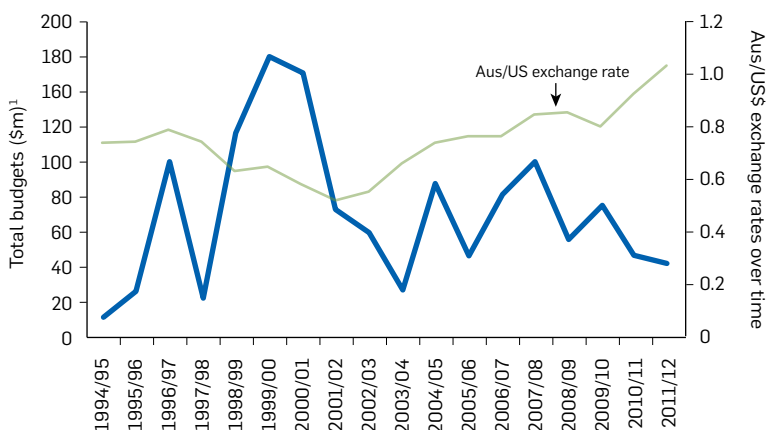
Notes: nfp – not for publication

1. Three-way co-productions are counted against each country involved. Therefore the totals by country exceed the total number and budgets of titles produced.

TOTAL NUMBER OF AUSTRALIAN CO-PRODUCTIONS, BY YEAR



TOTAL BUDGETS OF AUSTRALIAN CO-PRODUCTIONS, 1994/95–2011/12



Notes:
1. 2011 dollars, adjusted using the non-farm GDP deflator; base year 2010/11.

THE PRODUCER OFFSET

The introduction of the Producer Offset in July 2007, though designed to increase overall production, also had the potential to incentivise co-productions. From the foreign producer's perspective, it offers extra finance via a tax rebate of up to 40 per cent of qualifying Australian expenditure. From the Australian producer's perspective, projects identified as co-productions automatically qualify for the Offset without having to pass the Significant Australian Content (SAC) test. The introduction of the Offset has had little or no impact on international co-production activity to date, perhaps due in part to the high Australian dollar. The Offset has also enabled some projects to bring in foreign finance while retaining sufficient Australian elements, to be considered domestic productions.

CHARLOTTE GRAY

Charlotte Gray (feature, Australia/UK) has screened in cinemas in over 25 countries internationally.

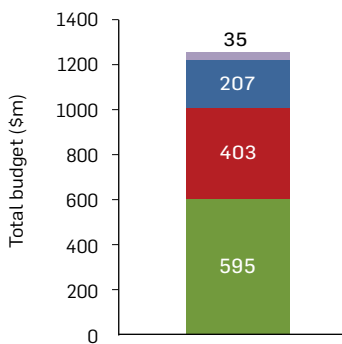
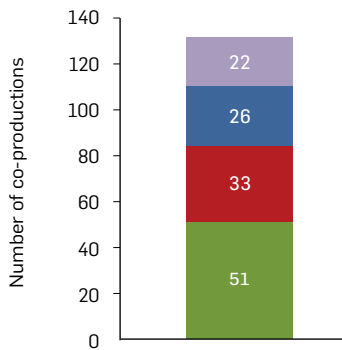


BY FORMAT

Feature films make up the largest proportion of Australia's 132 official co-productions, accounting for 39 per cent of all titles made, and 48 per cent of total production budgets.

NUMBER AND TOTAL BUDGETS OF CO-PRODUCTIONS BY FORMAT

- Documentary
- Animation
- TV drama
- Feature film



To date, the largest proportion of Australia's 132 co-productions has been feature films, accounting for 39 per cent of all titles made, and 48 per cent of total production budgets. Live-action TV drama accounts for around a quarter of titles and a third of budgets, and animation around 20 per cent. Documentaries have made up 17 per cent of titles, but only 3 per cent of total budgets, reflecting the generally lower budget levels of documentaries over drama formats.

Feature films have not only made up the largest proportion of co-production activity, they have also been the most consistently produced. Since 1986, there have only been five years without at least one feature co-production commencing production, and for each of the last eight years, there have been two or more features in production.

TV drama has also had a consistent presence, with only eight out of the last 26 years with no co-production titles. However, numbers have dropped over the last 10 years, coinciding with a growth in animation co-productions, an outcome of the increased incidence of children's programs in the co-production slate (see page 10).

The first TV animation co-production (*Li'l Elvis Jones and the Truckstoppers* with France) was produced in 1995/96. 2006 to 2008 were peak years for animation activity, and nearly all the titles made during this period partnered with Canada.

Of all formats, documentaries have seen the lowest levels of annual production, with a couple of peaks – three in 2000/01 and five in 2006/07. Documentaries tend to be made with lower budgets than drama productions, making it less common for them to be made at a scale that justifies the extra costs involved with the co-production model. (The average cost per hour of Australian documentaries over the last four years was \$290,000, compared to \$318,000 per hour for drama series, \$963,000 for drama mini-series and \$669,000 for children's drama. See page 12 for more information.)



SIRENS

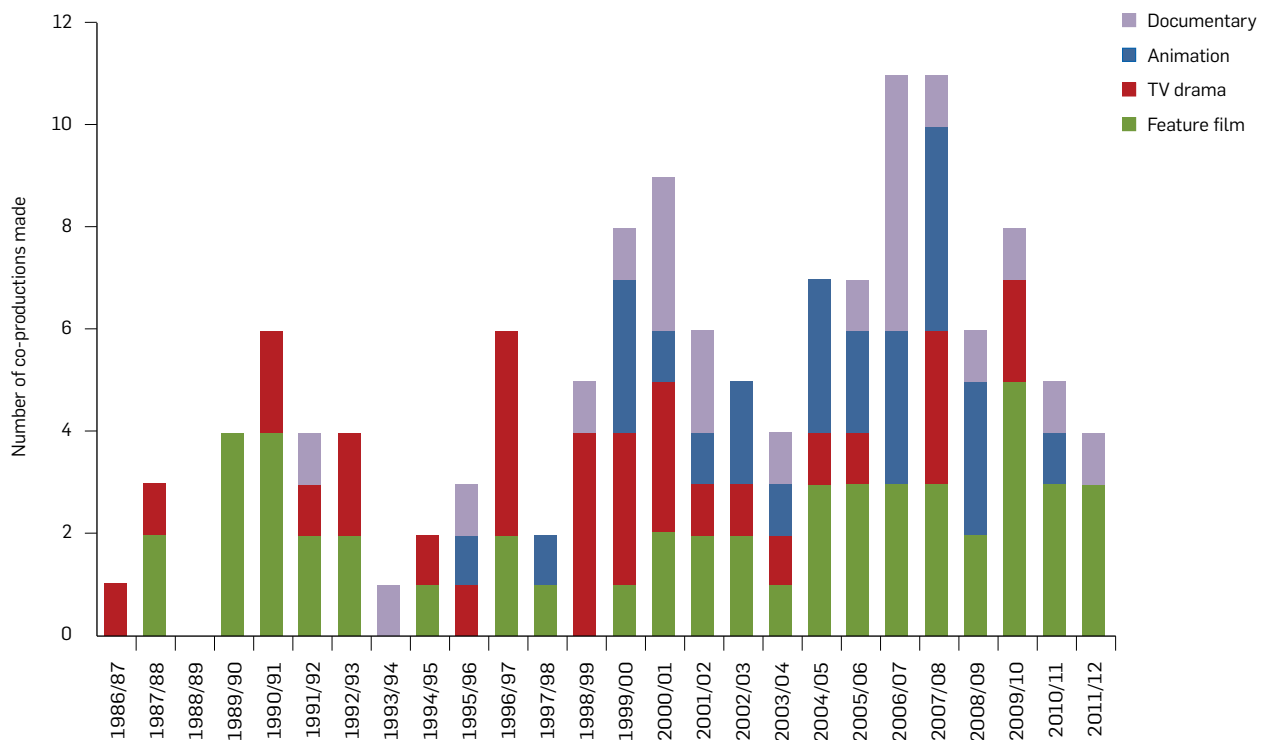
Sirens (feature, Australia/UK) premiered at Sundance Film Festival in 1994, and was in the top five Australian films at the box office that year. It went on to make 49 international sales.



NED KELLY

Ned Kelly (feature, Australia/UK) won two AFI Awards in 2003, screened at international festivals including London, Shanghai and Edinburgh, and was released in over 20 countries around the world. It was one of the top 10 Australian features sold on DVD in 2004.

CO-PRODUCTIONS BY FORMAT OVER TIME



TV PROGRAMS: CHILDREN'S VS ADULTS'

BORN OUT OF NECESSITY: THE CHALLENGE OF FUNDING CHILDREN'S PROGRAMMING

Strict limitations apply to advertising allowed during the designated timeslots for C (children's) and P (pre-school) programs on Australian commercial free-to-air channels. These restrictions make it more difficult for free-to-air networks to monetise children's programming when compared to content for adults, thereby diminishing the commercial appeal of children's TV production, and their resulting level of investment. The co-production model is one way that children's producers have been able to take advantage of finance from foreign territories (such as direct and indirect government funding, as well as broadcaster presales), in order to raise the full budget for their projects.

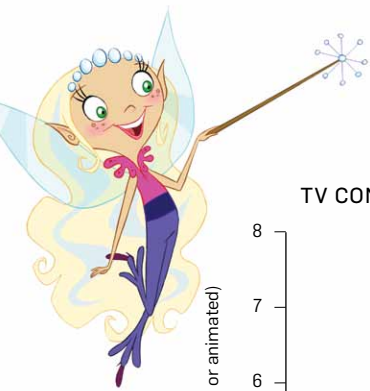
The majority of TV co-productions made since the mid-1990s have been programs for children.

Overall television drama co-production activity (live-action and animation combined) has grown since the mid-1990s, and the majority of television drama programs made during this time (and all since 2006/07) have been programs for children. Not surprisingly, the increase in animated co-productions has paralleled the increase in children's programs. All but two of the total animated co-productions – the two series of *John Callahan's QUADS!* (Australia/Canada) – have been programs for children.

From the Australian perspective, these developments roughly coincided with the increase to the minimum broadcast levels of first-release Australian children's drama required annually of the Australian commercial free-to-air networks, via the Children's Television Standard (CTS). Minimum levels were progressively increased from 16 hours to 32 hours per broadcaster between 1996 and 1998.

Australian children's drama, even when made as domestic programming, is more likely to include foreign finance than drama for adults, and foreign finance generally accounts for a greater proportion of the total budget. This reliance on foreign finance, either by way of a co-production or through foreign investment in local productions (for example, though presales to foreign broadcasters), is mainly a result of the difficulty in raising the full budget from local sources (see below).

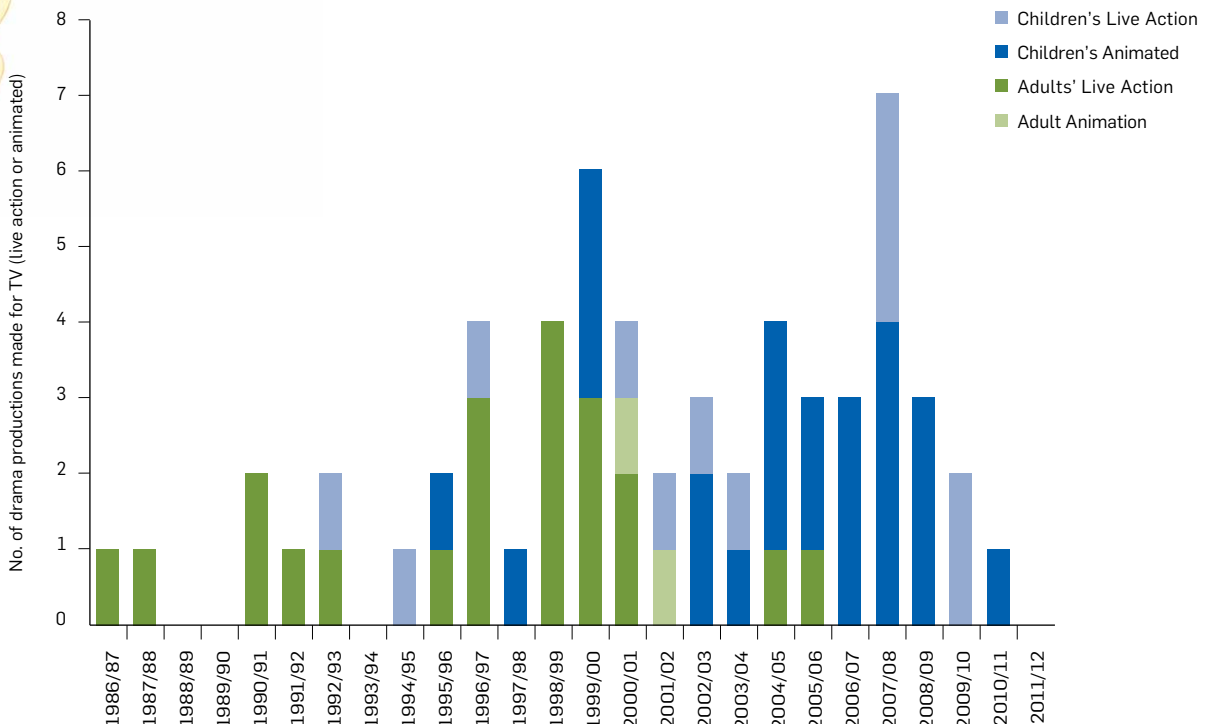
The animation format also offers advantages such as the capacity to revoice for different languages or accents, and settings that can be created in either partner country without relying on location shooting.



PEARLIE

The 26-episode *Pearlie* (children's animation, Australia/Canada) has sold to broadcasters in New Zealand, Hong Kong, South Africa, French and English Canada and several European territories including the UK and Germany.

TV CONTENT FOR CHILDREN AND ADULTS: A COMPARISON



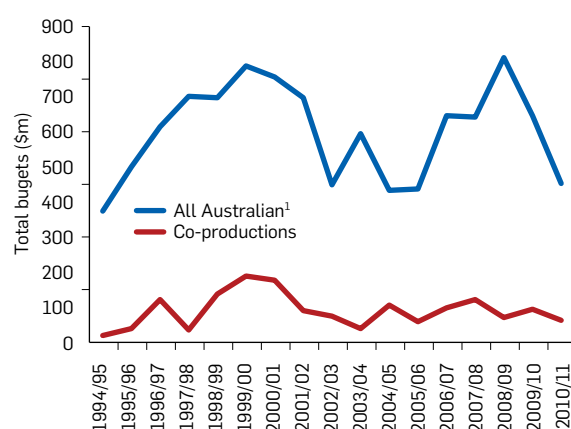
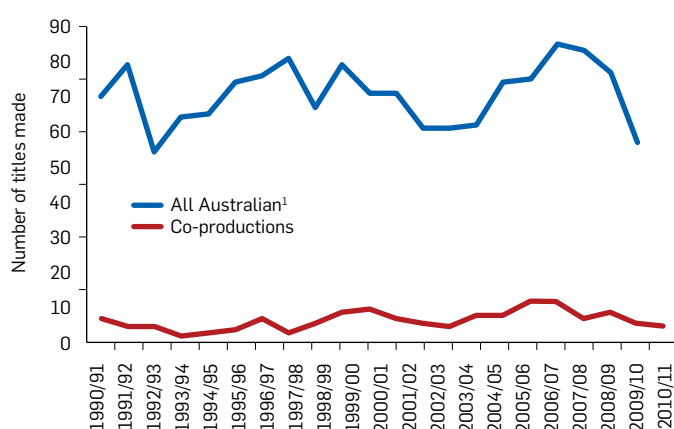
CO-PRODUCTIONS AS PART OF THE AUSTRALIAN PRODUCTION LANDSCAPE

Co-productions have made up 7 per cent of the annual drama production slate since 1990/91.

Since 1990/91, an average of 7 per cent of all Australian annual drama projects (feature films, TV drama and animation) have been co-productions. Due to the generally higher cost of co-productions compared to domestic productions (see page 12), they have made up 12 per cent of total budgets over this period.

Co-produced documentaries make up a very small proportion of total Australian production. While Australia has an annual documentary production slate of around 200 titles, to date only 22 documentaries in total have been co-productions.

CO-PRODUCTIONS AS A PROPORTION OF TOTAL AUSTRALIAN FEATURE FILM AND TV DRAMA PRODUCTION



Notes:

1. Productions under Australian creative control, including domestic, official co-productions and other productions involving shared creative control, i.e. with a mix of Australians in key creative positions.

BLACK ROBE

Black Robe (feature, Australia/Canada) was the Gala screening at Toronto International Film Festival in 1991, and received awards from the Australian Cinematographers Society, the Film Critics Circle of Australia and 10 awards from the Academy of Canadian Cinema and Television including Best Picture and Best Director. It was the 3rd top Australian film at the Australian box office in 1992, and went on to make over 50 international sales.

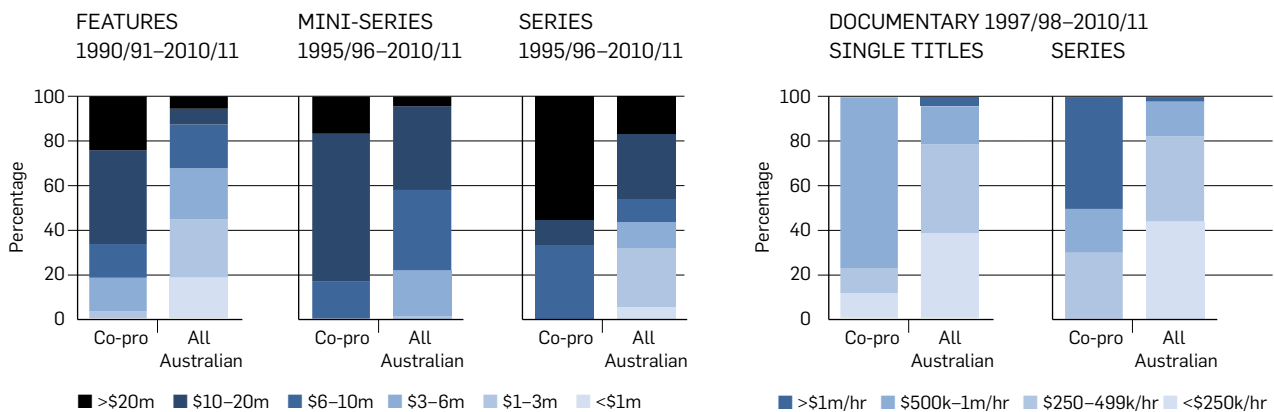


BUDGET RANGES

The types of stories and scale of projects suitable for the co-production model tend to be those operating with higher budgets.

On average, co-productions are made with higher budgets than domestic productions, with finance contributed from multiple territories enabling larger budgets to be raised, and the additional costs associated with making a co-production (such as travel, translation, and extra administrative and legal costs) concurrently driving up budgets. Added complexities, such as working across two or more territories, with multiple currencies and shared creative control, generally dictate that the types of stories and the scale of projects suitable to the co-production model will be those operating with higher budgets.

When adjusted for inflation, 66 per cent of co-production features made between 1990/91 and 2010/11 had budgets over \$10 million, compared to just 12 per cent of all Australian features made during that period. Similarly, 78 per cent of single-episode documentaries made as co-productions between 1997/98 and 2010/11 cost more than \$500,000 per hour, compared to 21 per cent of all single documentaries made over the same period. Documentary series and TV drama show the same tendency toward the higher budget ranges.



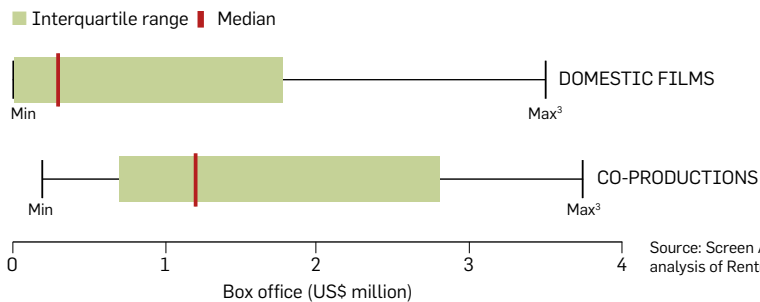
Notes: 2011 dollars. Budgets adjusted using the non-farm GDP deflator; base year 2010/11.

INTERNATIONAL RELEASE OF FEATURE CO-PRODUCTIONS

Feature co-productions are generally guaranteed a theatrical release in two territories – Australia and the co-producing country. However, Australian co-productions have tended to go beyond the two participating countries, and on average have reached a wider international audience than domestic features. Of the 67 feature films that reported international box office between 2007 and 2011, co-productions averaged 7.5 countries per title (excluding Australia), compared to 5.7 for domestic productions.

While studio-backed films (such as *Australia*, *Happy Feet Two*, *Knowing*, *Sanctum* and *Daybreakers*) have driven up average international box office takings for domestic productions, on a median basis, and an interquartile range basis, co-productions significantly outperformed domestic productions. The interquartile range is the range between the bottom 25 per cent of films and top 25 per cent of films when ranked according to total international box office takings, providing a profile of the 'typical' performance range.

INTERNATIONAL BOX OFFICE¹



Source: Screen Australia analysis of Rentrak data.

AUSTRALIAN FILMS RELEASED OVERSEAS, 2007–2011

	CO-PRODUCTIONS	DOMESTIC PRODUCTIONS
NO. FILMS:	11	56
INTERNATIONAL RELEASES:		
Average countries per title	7.5	5.7
Median countries per title	4	2
INTERNATIONAL BOX OFFICE:		
Average per title (US\$)	\$2.5m	\$12.4m
Median per title (US\$)	\$1.2m	\$0.3m
Range (US\$)	\$0.2m to \$12.6m	<\$0.01m to \$153.4m
Interquartile range ²	\$0.7m to \$2.8m	\$0.02m to \$1.8m

Notes:
 1. Statistical outliers not shown on chart. Nine out of the 67 titles were statistical outliers, all achieving between \$5 million and \$153 million in international box office. Most were studio supported but includes one co-production: *Australia*, *Bright Star* (Australia/UK), *Daybreakers*, *Happy Feet Two*, *Knowing*, *Legend of the Guardians: The Owls of Ga'Hoole*, *Mao's Last Dancer*, *Sanctum* and *Solo*.
 2. Range between bottom 25% of films and top 25% of films when ranked according to international box office takings.
 3. Excluding statistical outliers.

A CLOSER LOOK: CO-PRODUCTIONS BY PARTNER COUNTRY

Co-productions with Canada, the UK and France represent the highest level of Australia's activity to date.

The patterns of Australia's co-production activity with partner countries are affected by several factors, including availability of suitable stories and partner producers, expertise in formats (for example, animation) and specific funding available within partner countries, all of which can vary over time.

France, the UK and Canada, all of whom have had agreements with Australia for more than 20 years, represent the highest level of activity, with Canada accounting for 42 of the 132 co-productions, the UK 39 and France 29. Amongst our newest partner countries there have been four co-productions with Singapore, three with China and none as yet with South Africa. Some treaties, such as those with Italy and Israel, while having been in place for several years, are yet to produce significant levels of production.

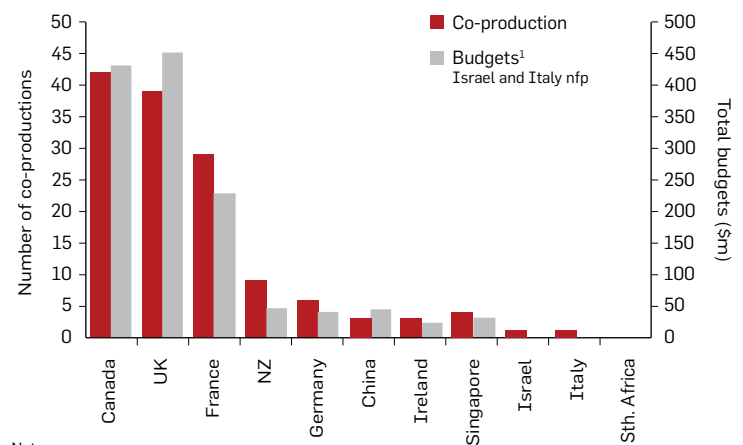
Activity has been reasonably consistent with the three dominant co-production partners. Since the inception of the co-production program, Australia has made co-productions with one or more of these partners every year except 1989/90.

The remaining eight co-production agreements have, for the most part, resulted in sporadic or minimal activity. For some partners, certainly

China and Singapore, the lower number reflects only the shorter duration of the treaty agreement.

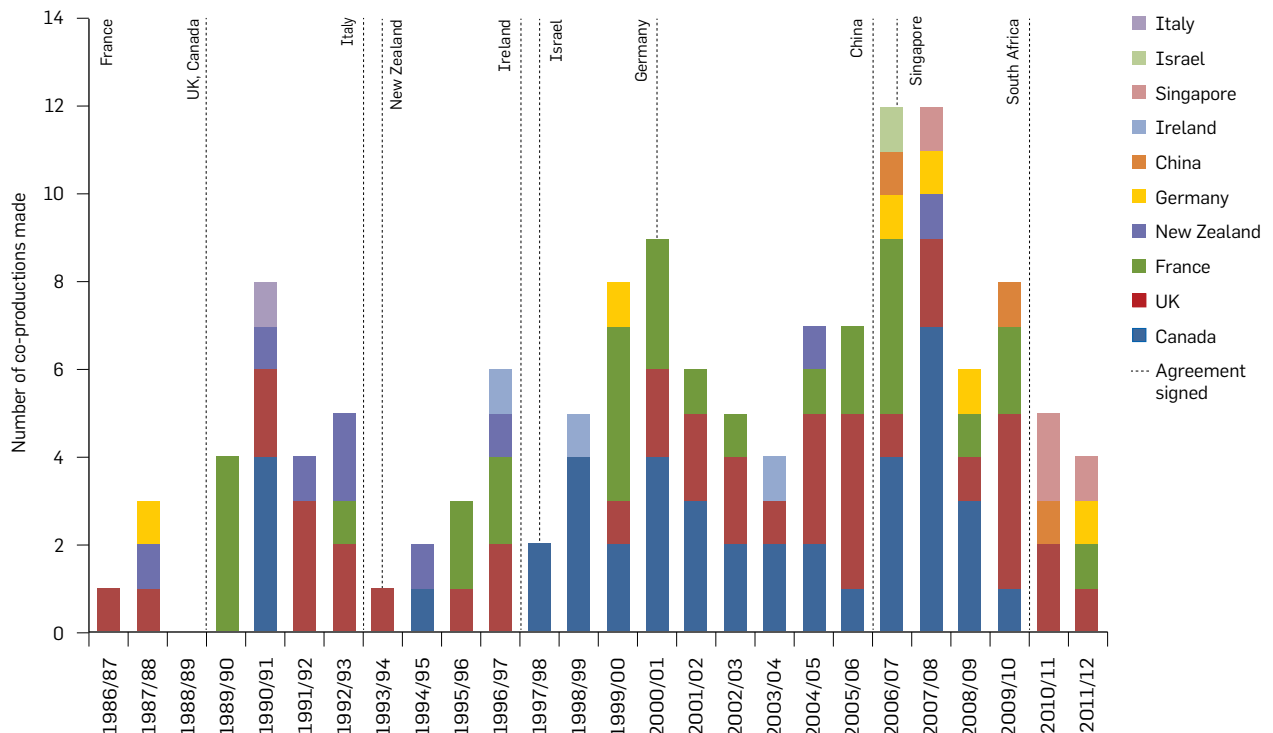
Productions with Canada have primarily been TV programs (particularly animation), while Australia/UK co-productions have chiefly been feature films, and activity with France has been mixed.

TOTAL ACTIVITY BY COUNTRY



Notes:
nfp – not for publication
1. 2011 dollars. Budgets adjusted using the non-farm GDP deflator; base year 2010/11.

CO-PRODUCTIONS BY COUNTRY OVER TIME



Notes: Projects made prior to signing dates were made under one-off MOUs.

THREE-WAY CO-PRODUCTIONS

A 'three-way co-production' refers to content produced jointly by an Australian co-producer, a co-producer from one of Australia's co-production partner countries, and a third co-producer from a country that has a co-production arrangement either with Australia or the other partner country. As an example, the feature film *At World's End* (2008/09) was a three-way co-production between Australia, Germany and Denmark. While Australia does not currently have a co-production arrangement in place with Denmark, Germany has co-production arrangements with both Australia and Denmark, so the project qualified as a three-way co-production.

Three-way co-productions can ease the financial burden on participants by enabling costs to be split three ways rather than two. However, they can also add extra complexity, with three sets of guidelines to satisfy, three countries' market requirements to be met, and (potentially) three different currencies to be factored.

While only six of Australia's 132 co-productions to date have been made as three-ways, it is much more common for European projects to be made with three (or more) participating countries. (See page 17).



BALANCING FINANCIAL AND CREATIVE CONTRIBUTIONS

On a project-by-project basis, Australia's financial contribution, spend and creative contribution need to be balanced.

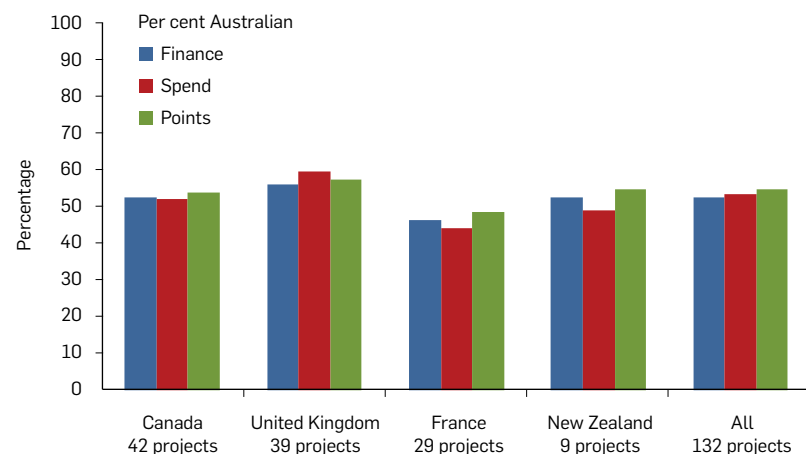
Minimum levels of Australian financial and creative participation are set out in each co-production arrangement. The minimum is typically 20 or 30 per cent, and this applies to both financial and creative contributions. There is a general Australian requirement that a balance is met between the proportion of the budget raised by the Australian producer, and both the proportion spent on Australian elements and the Australian creative contribution (within allowable margins).

Creative contribution is determined by a test of 'Australian Qualifying Points' (AQP). Key creative roles are allocated a points value, for example, writers and directors across formats attract two points each, DOPs and editors one point each. Different tests apply for drama (feature film and TV drama), animation and documentary, reflecting the differences in key creative/technical personnel for these different types of project.

On a project-by-project basis, Australia's financial contribution, spend and creative contribution need to be reasonably balanced, and need to meet the relevant minimum levels of 20 or 30 per cent. On any single project, it's likely that the overall balance will be lower for one of the partner countries – and could be as low as 20 per cent while still qualifying.

However, over time, the participation of partner countries should be close to equal. For example, while a single Australia/Canada co-production could have Australian participation of 20 per cent, and still qualify as a co-production, over time, the Australia/Canada co-productions as a whole need to show a balance between Australian and Canadian participation.

BALANCE OVER TIME: AVERAGE PERCENTAGE OF AUSTRALIAN PARTICIPATION ON ALL CO-PRODUCTIONS TO DATE



ZIGBY

Zigby (children's animation, Australia/Canada/Singapore) won an AWGIE Award for Children's Television (P Classification) in 2009 and has sold to countries throughout Europe.

Australian co-production partners

Whatever the format, each co-production project represents a creative and financial partnership between the Australian and foreign producers involved – and plenty of negotiation. Understanding the industry structures and systems in place in the partner country plays a vital role in successfully navigating this process.

The following section examines Australia's 11 co-production partners, providing a summary table and profiling each country and the factors influencing their co-production activity.

CAPTAIN COOK: OBSESSION AND DISCOVERY

Captain Cook: Obsession and Discovery (documentary, Australia/Canada) screened at Banff World Television Festival 2008. It has had screenings on free-to-air and subscription television in Australia and was in the top 10 Australian documentaries sold on DVD in 2008.

A summary of Australia's co-production partners

	AUSTRALIA	CANADA	CHINA	FRANCE	GERMANY	IRELAND
CO-PRODUCTIONS WITH AUSTRALIA						
Type of agreement		Treaty	Treaty	MOU	Treaty	Treaty
Date signed ⁵		23-Jul-90	7-Jun-06	15-May-86	17-Jan-01	4-Feb-98
Entry into force		26-Sep-90	19-Dec-08	15-May-86	12-Sep-01	7-Sep-98
Treaty coverage		Film/TV	Film	Film/TV	Film/TV	Film/TV
Aus contribution level allowable		Min: 30% Max: 70%	Min: 20% Max: 80%	Min: 20% Max: 80 ¹	Min: 30% Max: 70%	Min: 20% Max: 80%
No. co-productions to date		42	3	29	6	3
Average no. co-productions annually ⁴		1.9	0.8	1.1	0.5	0.2
OVERALL CO-PRODUCTION ACTIVITY						
Competent authority	Screen Australia	Telefilm Canada	China Film Co-production Corporation (CFCC)	Centre National de la Cinématographie (CNC)	Federal Office of Economics & Export Control (BAFA)	The Irish Film Board
No. partner countries	11	53	n.a.	40+	22	3 + Europe
ECCC signatory	✗	✗	✗	✓	✓	✓
Total no. co-productions per year – film	3 (2010/11)	28 (2010)	n.a.	118 (2010)	80 (2011)	14 (2011)
Total no. co-productions per year – TV	2 (2010/11)	38 (2010)	n.a.	308 hours (2010)	16 (2011)	1 (2011)
GOVERNMENT FUNDING						
Direct funding: national	✓	✓	✓	✓	✓	✓
Direct funding: regional	✓	✓	✗	✓	✓	✗
Indirect funding (eg tax rebates/credits): national	✓	✓	✗	✓	✓	✓
Indirect funding (eg tax rebates/credits): regional	✓	✓	✗	✓	✗	✗
SOCIETY/INDUSTRY/MARKET						
Language	English	English, French	Mandarin, Cantonese	French	German	English, Gaelic
Population (m)	23	34	1,360	63	82	5
No. films produced annually	17 (2010/11)	58 (2010/11)	588 (2011)	272 (2011)	205 (2011)	18 (2011)
Average budget of films	€6m	€3m (Eng); €2m(Fr)	€2m	€6m	€5m	€3m
Total annual cinema admissions (m)	85 (2010/11)	105 (2010)	370 (2011)	217 (2011)	130 (2011)	16 (2011) ³
Domestic share of box office	4% (2010/11)	3% (2010)	54% (2011)	41% (2011)	22% (2011)	5% (2011)
No. TV households (m)	8	14	387	26	35	2
Local content regulation on TV	✓	✓	✓	✓	✓ ⁶	✓ ⁶
Expenditure on entertainment (2010) ³	US\$32m	US\$38m	US\$86m	US\$67m	US\$87m	US\$4m
Legal system	Common Law	Common Law (Quebec Civil Law)	Civil Law	Civil Law	Civil Law	Common Law mixed with Customary Law
Currency	SAUS	SCAN	¥CNY	€EUR	€EUR	€EUR
Exchange rate last 5 yrs (Aus:foreign)		av 0.95; range 0.76–1.07	av 6.07; range 4.19–7.12	av 0.66; range 0.48–0.82	av 0.66; range 0.48–0.82	av 0.66; range 0.48–0.82

Notes:

n.a. – not applicable

1. The French/Australian MOU is asymmetrical: the Australian minimum is 40% but the French minimum is 20%

2. The UK is an ECCC signatory but is not eligible for Eurimages funding

3. PwC provisional figures

4. Total number of co-productions with Australia divided by the number of years since the agreement was signed

5. Refers to the agreement currently signed; however MOUs may have been in place for some countries prior to the treaty being signed

6. EU Audiovisual Media Services Directive only

ISRAEL	ITALY	NZ	SINGAPORE	SOUTH AFRICA	UK
Treaty	Treaty	MOU	Treaty	Treaty	Treaty
25-Jun-97	28-Jun-93	23-Dec-94	7-Sep-07	18-Jun-10	12-Jun-90
13-Jan-98	12-Dec-96	23-Dec-94	16-Oct-08	22-Aug-11	27-Aug-90
Film/TV	Film	Film/TV	Film/TV	Film/TV	Film/TV
Min: 20% Max: 80%	Min: 30% Max: 70%	Min: 20% Max: 80%	Min: 20% Max: 80%	Min: 20% Max: 80%	Min: 30% Max: 70%
1	1	9	4	0	39
0.1	0.1	0.5	0.8	0	1.8
Israeli Film Fund	Ministero per i Beni e le Attivita Culturali	New Zealand Film Commission	Media Development Authority	National Film and Video Foundation	British Film Institute
10	34	13	11	7	9 + Europe
x	✓	x	x	x	✓ ²
3-5	91 (2009-Apr 2012)	1 (2009-2011)	1 (2009)	7 (2011)	21 (2010)
5-10 (docs)	n.a.	2 (2009-2011)	7 (2009)	8 (2011)	n.a.
✓	✓	✓	✓	✓	✓
✓	✓	x	x	✓	✓
✓	✓	✓	x	✓	✓
x	x	x	x	✓	x
Hebrew, Arabic	Italian	English, Maori	English, Chinese, Malay	English, Afrikaans	English
7	61	4	5	50	63
16 (2010)	155 (2011)	13 (2011)	14 (2010)	23 (2010)	79 (2010)
€800,000	€3m	€3m	€1m	€893,000	€2.5m
10 (2010)	112 (2011)	14 (2011)	19 (2010) ³	26 (2011)	172 (2011)
10% (2008)	36% (2011)	2% (2011)	5% (2011)	11% (2010)	36% (2011)
2	24	2	1	8	27
✓	✓ ⁶	x	x	✓	✓
US\$3m	US\$42m	US\$4m	US\$3m	US\$8m	US\$77m
Common Law mixed with Jewish, Christian & Muslim laws	Civil Law	Common Law	Common Law	Mix of Civil Law, Common Law and Customary Law	Common Law
₪ Shekel	€EUR	₪NZ	₪SIN	₪RAND	₪GBR
av 3.37; range 2.34-4.08	av 0.66; range 0.48-0.82	av 1.26; range 1.1-1.37	av 1.23; range 0.93-1.39	3yr av 7.22; range 6.38-8.41	av 0.56; range 0.39-0.68

THE EUROPEAN MODEL: COMMITTED SUPPORT

Funding and support from the 43-member Council of Europe has resulted in a high propensity for international co-productions between European partners. The council has implemented two initiatives designed to foster diplomatic harmony, cultural exchange and economic development via co-productions: **Eurimages**, a funding initiative set up in 1988, and **European Convention on Cinematographic Co-production**, established in 1994, a treaty designed to promote the development of European multilateral (or three-way) co-productions.

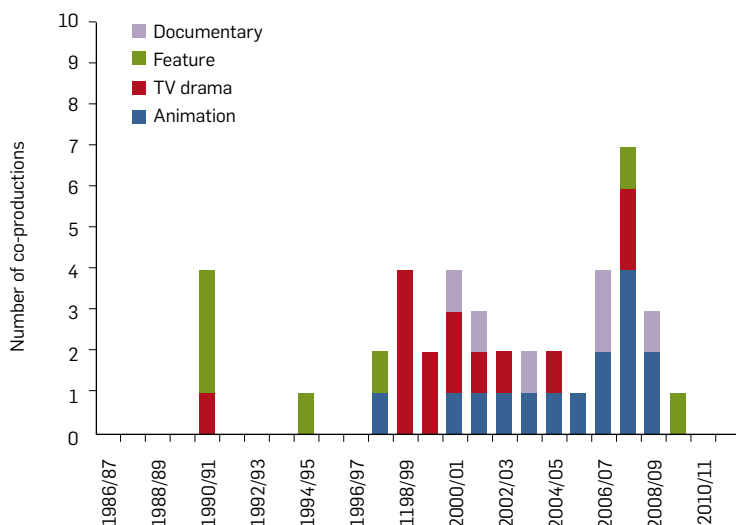
Eurimages is a Partial Agreement between 36 members of the Council of Europe. It allocates 90 per cent of its funding (totalling €23 million in 2011) to support co-productions, with the remainder going to distribution and exhibition activities. To be eligible for co-production funding, projects must have at least two co-producers from different member states, and comply with the bilateral treaties between both or, where applicable, the European Convention on Cinematographic Co-production. Co-producers from non-member states (such as Australia) can be involved via three-way co-productions, where the other two co-producers are member states (see Three-way co-productions, page 14). The share of non-European partners is limited to 30 per cent.

The **European Convention on Cinematographic Co-production** supports three-way European projects by simplifying the processes and procedures involved in their administration, through provision of a single contractual instrument. The aim is to avoid disparities brought about by the variations between bilateral treaties. Projects must involve at least three co-producers from member states of the Council of Europe. It can also be used for bilateral co-productions between signatory countries where no bilateral treaty exists. The co-produced work must also meet the definition of a European cinematographic work set out in the Convention.

In addition, the European Union's **Audiovisual Media Services Directive** requires EU countries to ensure that television channels, where practicable, reserve at least half their broadcasting time for films and programs made in Europe.

Partner profiles

CANADA



Since the Australia/Canada co-production treaty was signed in 1990, Canada has become Australia's most active partner country, with a total of 42 official co-productions to date. Four projects (three features and one TV drama) were made in the first year of the agreement and by 1997 the partnership was yielding consistent output, peaking in 2007 with seven projects.

Most Australia/Canada co-productions have been TV programs – predominantly live-action from the mid-1990s to the early 2000s, with animation taking over more recently.

The majority of TV drama projects occurred between 1998 and 2002, when the low Australian dollar increased Australia's appeal as a filming location, for both foreign productions and co-productions. As a result, this period presented the highest levels of total budgets for co-productions across all countries to date. Australia/Canada projects accounted for the majority, with the *BeastMaster* and *Sir Arthur Conan Doyle's The Lost World* series, in particular, boosting overall budgets during that period.

Canada has long been a market leader in animation, and the majority of Australia's animated co-productions to date have been made with Canada. All but two of these animated co-productions (the two series of *John Callahan's QUADS!*) were children's programs. Canada's broadcast TV regulatory authority, the Canadian Radio-television and Telecommunications Commission (CRTC), recognises the importance of producing local content for children and while there are no quotas for children's

content it is held in high esteem for both its excellence and its exportability, both of which ensure its continued development.

Canadian co-productions have long been seen as a viable and essential component to building a vibrant domestic market that can compete with the dominant US industry and, as a result, Canada has embarked on co-productions with more than 50 partner countries over the last 30 years. Co-productions enable Canadian producers to work with partners from similarly sized markets to produce high-quality, high-budget products for distribution in the global marketplace, whilst enhancing and strengthening the sector to ensure it remains more than a service industry for Hollywood productions. They also assist Canadian producers to meet their local content requirements for TV. A downward trend in co-production activity in recent years saw Canada undertake a review of their co-production program in

2011 in an effort to remain a competitive partner country.

The Canadian Government's support for both co-productions and the overall industry strengthened during the decade from 1996 to 2006 (the period when co-production activity with Australia accelerated), with direct funding through new TV and film funds and the introduction of tax rebates through the Film or Video Production Services Tax Credit.

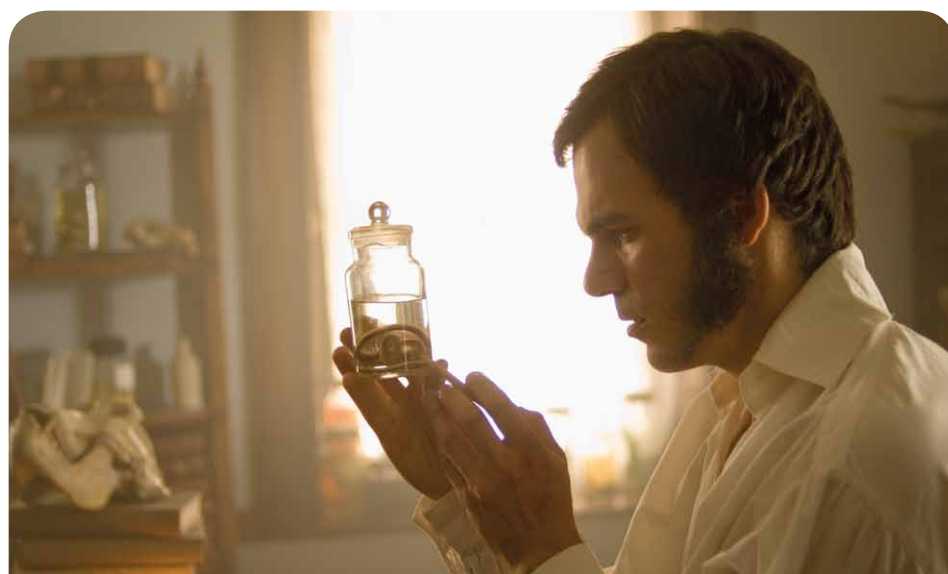
In 2010, Canada made a total of 66 co-productions (including 38 for TV), with collective budgets reaching over €424 million. France and the UK are among Canada's most active partner countries.

With high output across co-productions and the industry as a whole, comes an abundance of talented, experienced and award-winning crews, strong PDV and animation sectors, and a history of technological innovation within the industry. Each of Canada's principal production centres can handle up to eight major productions simultaneously, making it attractive to large-budget productions.

The volume of available direct and indirect funding programs has historically made Canada an attractive co-production partner country. Federal and provincial tax credits offer rebates ranging from 16 to 65 per cent, and public funds available in 2011 totalled €335 million. Film and TV production in Canada increased by 8.9 per cent in 2010/11, to an all-time high of CAN\$5.5 billion. However, in March 2012, the Canadian Government announced budget cuts to several funding bodies including the Canadian Broadcasting Corporation, the National Film Board of Canada and Telefilm Canada, in a move likely to impact both Canada's local production levels as well as collaborations with international partners.

DARWIN'S BRAVE NEW WORLD

Darwin's Brave New World (documentary, Australia/Canada) has had television screenings in Australia, Canada, Germany and France, and received a Logie Nomination for Outstanding Factual Program in 2010.



AUSTRALIA/CANADA CO-PRODUCTIONS				
PROD YR	TITLE	TYPE	AUSTRALIAN PRODUCER	FOREIGN PRODUCER
1990/91	Black Robe	Feature	Samson Productions Pty Ltd	Alliance Productions
1990/91	Map of the Human Heart ¹	Feature	Vincent Ward Films Pty Ltd	Sunrise Films Ltd (Canada) Working Title Films (UK)
1990/91	On My Own ²	Feature	Rosa Colosimo Pty Ltd	Alliance Communications Corporation (Canada) Ellepi Film (Italy)
1990/91	Golden Fiddles	TV drama	South Australian Film Corporation	Wacko Entertainment Corporation
1994/95	Turning April	Feature	Total Film and Television Pty Ltd	Alliance Productions
1997/98	Dumb Bunnies	Animation (children's)	Yoram Gross - Village Roadshow	Nelvana Limited
1997/98	Sally Marshall is Not an Alien	Feature	Infinity Pictures Pty Ltd	Cinar Productions Inc
1998/99	The Lost World - pilot	TV drama	Village Roadshow Pictures	Telescene Film Group Inc
1998/99	BeastMaster series 1	TV drama	Coote/Hayes Holdings Pty Ltd	Alliance Atlantis Communications Inc
1998/99	Dr Jekyll and Mr Hyde	TV drama	Coote/Hayes Holdings Pty Ltd	Telescene Film Group Inc
1998/99	Sir Arthur Conan Doyle's The Lost World series 1	TV drama	Coote/Hayes Holdings Pty Ltd	Telescene Film Group Inc
1999/00	The Lost World series 2	TV drama	Coote/Hayes Holdings Pty Ltd	3703118 Canada Inc
1999/00	BeastMaster series 2	TV drama	Coote/Hayes Productions	Dar II Productions Inc
2000/01	TheSaddle Club	TV drama (children's)	Crawford Productions	Protocol Entertainment Inc
2000/01	Bruce and Me	Documentary	Outlaw Pictures	Outlaw Pictures (Canada) Inc
2000/01	John Callahan's QUAD's	Animation	Media World Features Pty Ltd	Nelvana Limited
2000/01	BeastMaster series 3	TV drama	Coote/Hayes Beastmaster Three Pty Limited	Dar III Productions Inc
2001/02	Guinevere Jones	TV drama (children's)	Crawford Productions	Original Pictures Inc
2001/02	Helen's War: Portrait of a Dissident	Documentary	Sonja Armstrong Productions Pty Ltd	Real to Reel Productions Inc
2001/02	John Callahan's QUAD's series 2	Animation	Media World Features Pty Ltd	Nelvana Limited
2002/03	Yakkity Yak	Animation (children's)	Kapow Pictures Pty Ltd	Studio B Productions Inc
2002/03	The Saddle Club series 2	TV drama (children's)	Crawford Productions	Protocol Entertainment Inc
2003/04	The Eggs	Animation (children's)	B&T Entertainment	Funbag Animation Studios Inc
2003/04	A Machine to Die For	Documentary	Eliot Jarvis Productions Pty Ltd	Exploration Production Inc
2004/05	Faireez	Animation (children's)	Moody Street Kids Pty Ltd	Funbag Animation Studios Inc
2004/05	Answered by Fire	TV drama	Beyond Simpson Le Mesurier Productions Pty Limited	ABF Productions (Muse) Inc
2005/06	Erky Perky series 1	Animation (children's)	Erky Perky Pty Ltd	Erky Perky Productions (Canada) Inc
2006/07	Erky Perky series 2	Animation (children's)	Erky Perky Pty Ltd	Erky Perky Productions (Canada) Inc
2006/07	G2G (Got to Go)	Animation (children's)	G2G Productions Pty Ltd	March Entertainment Inc
2006/07	Captain Cook – Obsession and Discovery	Documentary	Cook Films	Ferns Productions
2006/07	Medicine Woman	Documentary	Visionquest Entertainment International Pty Ltd	4 Square Productions Ltd
2007/08	Dex Hamilton Alien Entomologist	Animation (children's)	SLR Productions	Dex I Productions Inc
2007/08	Zigby ³	Animation (children's)	ASE Studios Pty Limited	Zebra (I) Productions Inc (Canada) Big Animation Pty Ltd (Singapore)
2007/08	Pearlie	Animation (children's)	Sticky Pictures Pty Ltd	Nelvana Limited
2007/08	Zeke's Pad	Animation (children's)	ASE Studios Pty Limited	My Pad Productions Inc
2007/08	Stormworld	TV drama (children's)	Great Western Entertainment Pty Ltd	Carpediem Film & TV Inc
2007/08	The Saddle Club series 3	TV drama (children's)	Crawford Productions	Protocol Entertainment Inc
2007/08	Goblin Shark Attack	Feature	Limelight International Media Entertainment Pty Ltd	Malibu Shark Productions Inc
2008/09	Erky Perky series 3	Animation (children's)	Erky Perky Pty Ltd	Erky Perky Productions (Canada) Inc
2008/09	dirtgirlworld	Animation (children's)	dirtgirlworld productions Pty Ltd	DECODE Entertainment Inc
2008/09	Darwin's Brave New World	Documentary	ScreenWorld Pty Ltd	Ferns Productions
2009/10	Arctic Blast	Feature	Arctic Productions Pty Ltd	Polar Productions Inc

Notes:

1. Denotes three-way co-production with United Kingdom
2. Denotes three-way co-production with Italy
3. Denotes three-way co-production with Singapore

CHINA

One of Australia's newest co-production agreements, the treaty between Australia and China was signed in 2006, and is limited to feature films only. Starting with a three-way co-production with Germany, *The Children of the Silk Road*¹ in 2006/07, the Australia/China relationship has produced three features with budgets totalling \$45 million.

China is considered a partner country with potential for growth in co-production activity. It offers access to a market of considerable size which generates much of its appeal. In 2011, cinema admissions in China totalled 370 million with a market share of 53.6 per cent for national films. There are 500 million TV sets in China and 387 million TV households.

In 2011, Chinese film productions totalled 588 – such high levels of output result in the development of a vast, highly skilled production base. China also boasts a large studio infrastructure, including Shanghai Film Studios, August First Film Studios and Hengdian World Studios, which are capable of supporting a large number of simultaneous productions.

The automatic qualification of co-productions as local content, and therefore Chinese distribution, is significant considering that foreign feature releases are currently restricted to 20 films per year², and there are also restrictions on the amount of foreign TV drama that can be broadcast.

Qualifying projects must receive provisional approval from both the China Film Co-production Corporation, for official co-production status, and the State Administration of Radio, Film and Television, for censorship certification. Final co-production and censorship approvals are also required prior to release.

The signing of the Australia/China treaty corresponds with an increase in support for co-productions from the Chinese Government, which has demonstrated a keenness for the Chinese film and TV industry to engage with international audiences and producer partners. In addition to Australia, China has signed official co-production treaties with several other countries including Canada, France, Singapore and Italy, and non-treaty co-production activity has also been increasing with many territories.

² In February 2012, China and the US reached a new trade agreement for films by allowing 14 additional IMAX, 3D or animation films into the market, but retaining the 20-film per year quota for revenue sharing titles.

¹ *The Children of the Silk Road* was made under an MOU prior to signing of the Australia/China Treaty.

AUSTRALIA/CHINA CO-PRODUCTIONS				
PROD YR	TITLE	TYPE	AUSTRALIAN PRODUCER	FOREIGN PRODUCER
2009/10	The Dragon Pearl	Feature	Last Dragon Holdings Pty Ltd	Zhejiang Hengdian Film Production Co., Ltd
2006/07	The Children of the Silk Road ¹	Feature	Bluewater Pictures	Ming Productions (China) Zero Films (Germany)
2010/11	33 Postcards	Feature	Portal Pictures Pty Ltd	Zhejiang Hengdian Film Production Co., Ltd

Notes:

1. Denotes three-way co-production with Germany



THE CHILDREN OF THE SILK ROAD

The Children of the Silk Road (feature, Australia/China/Germany) was the 3rd top Australian film at the Australian box office in 2008, and screened at cinemas around the world including China, the US, Mexico, New Zealand and throughout Europe.



FRANCE

Australia's first official co-production agreement (an MOU with France, signed in 1986), has resulted in 29 productions to date, with combined budgets of \$227 million. They represent a mix across all genres, with 11 features, eight documentaries, eight animated series and two TV dramas.

As one of Europe's most active co-producers, France has co-production agreements in place with more than 40 partner countries, and made a total of 118 co-productions in 2010. Over the past five years, Belgium, Germany and Italy have been France's most active partners.

As well as a long history of making international co-productions, France also has significant expertise in animation production. With a greater range of roles eligible for qualifying points, the French animation test offers more flexibility compared to the live-action test, which also requires a minimum of five days shooting and working in France. The Australia/France agreement stipulates different minimum and maximum contribution levels on the Australian (40–80 per cent) and French sides (20–60 per cent).

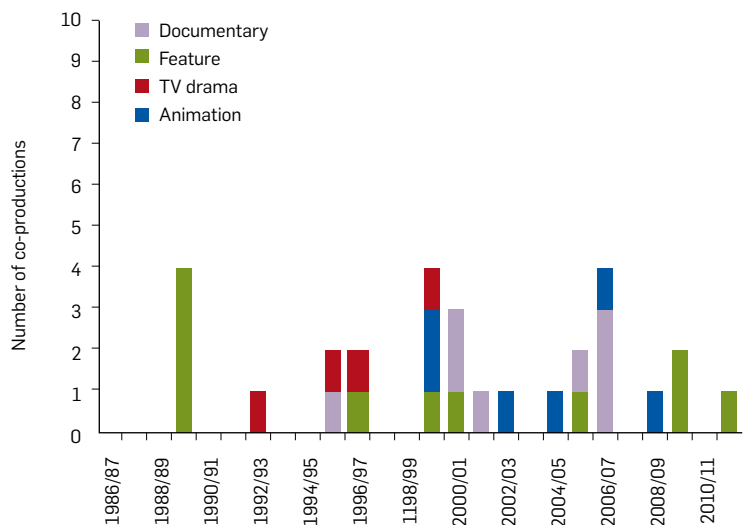
For qualifying co-productions, government assistance is available through the funding programs of the Centre national du cinéma et de l'image animée (CNC). In addition, the CNC has also introduced the World Cinema Support (Aide aux cinémas du monde), a new selective fund dedicated to international co-productions. It will support 40 to 60 projects per year from a total annual budget of €6 million.

The French production industry as a whole is vast and well established. In 2011, 272 feature films were produced with a combined expenditure of €1.4 billion. TV regulations stipulate 60 per cent of broadcasting must consist of European audiovisual works, and 40 per cent of broadcast content must be original French language productions. Combined, these regulations saw 308 hours of French-produced TV content made in 2010.

CRACKING THE COLOUR CODE

Cracking the Colour Code (documentary, Australia/France) won the AFI Award for Best Cinematography in a Documentary in 2009, screened on SBS and Discovery in Australia, and made six international sales on top of presales to French-speaking territories and Finland.

France also offers access to an extensive potential market, with a population of 63 million people and 26 million TV households. In 2011, cinema admissions totalled 216.6 million with a significant 41 per cent market share for national films. While studio infrastructure is limited, the opportunity to shoot at landmarks and on streets without charge is a drawcard for collaborators.



Partner profiles

AUSTRALIA/FRANCE CO-PRODUCTIONS				
PROD YR	TITLE	TYPE	AUSTRALIAN PRODUCER	FOREIGN PRODUCER
1989/90	Dingo	Feature	Gevest Australia Pty Ltd	AO Films
1989/90	Green Card	Feature	Green Card Productions	R.I.O., S.A
1989/90	Isabelle Eberhardt	Feature	Seon Films International Pty Ltd	Les Films Aramis
1989/90	Until the End of the World	Feature	Village Roadshow Pictures	Argos Film
1992/93	Deepwater Haven ¹	TV drama (children's)	Beyond Productions Pty Ltd	F Productions (France) South Pacific Pictures (NewZealand)
1995/96	Li'l Elvis Jones and the Truckstoppers	Animation (children's)	Australian Children's Television Foundation	France Animation
1995/96	Advertising Missionaries	Documentary	Aspire Films Pty Ltd	Ellipse Programme
1996/97	Love in Ambush	Feature	PRO Films (No.4) Pty Ltd	Film International Television Production
1996/97	The Violent Earth	TV drama	Crawford Productions	Gaumont Television
1999/00	Old Tom	Animation (children's)	Yoram Gross-EM.TV	Millimages SA
1999/00	Wicked!	Animation (children's)	Energie Entertainment	France Animation
1999/00	Wheel Squad	Animation (children's)	Energie Entertainment	France Animation
1999/00	The Old Man Who Read Love Stories	Feature	Magnetic Hall Pty Limited	Fildebroc S.A.
2000/01	Hacktivists	Documentary	Hilton Cordell & Associates Pty Ltd	Dominant Sept
2000/01	Robert Fortune – The Tea Thief	Documentary	Diane Perelsztejn & Company Pty Ltd	La Huit Production
2000/01	Paradise Found	Feature	Stella Productions	Le Sabre
2001/02	Shark Tracker	Documentary	Film Projects Pty Ltd	French Media Video Compagnie
2002/03	Seaside Hotel	Animation (children's)	Yoram Gross-EM.TV	Tele Images Kids
2004/05	Seaside Hotel series 2	Animation (children's)	Flying Bark Productions	Tele Images Kids
2005/06	Museum of the World	Documentary	CIS and Associates	Tetra Media Co
2005/06	Elephant Tales	Feature	Adelaide Motion Picture Company Pty Ltd	Break-Out Films
2006/07	Street Football	Animation (children's)	Yoram Gross Productions	Tele Images Kids
2006/07	End of the Rainbow	Documentary	Looking Glass Pictures Pty Ltd	Trans Europe Film
2006/07	In My Father's Country	Documentary	Mayfan Pty Ltd	Films a Trois
2006/07	Cracking the Colour Code	Documentary	Electric Pictures Pty Ltd	Gedeon Programmes
2008/09	Sally Bollywood	Animation (children's)	Trackdown Digital	Tele Images Kids
2009/10	The Tree	Feature	Taylor Media	Les Films Du Poisson Sarl
2009/10	Santa's Apprentice	Feature	ASE Studios Pty Limited	Alphanim Lte
2011/12	Two Mothers	Feature	The Grandmothers Pty Ltd	CINE-@

Notes:

1. Denotes three-way co-production with New Zealand

IN MY FATHER'S COUNTRY

In My Father's Country (documentary, Australia/France) premiered at the prestigious International Documentary Festival of Amsterdam (IDFA) in 2008. It went on to screen at Banff World Television Festival and win the Australian Directors Guild Award for Best Direction in a Feature Documentary the same year.



GERMANY

Australia has partnered with Germany on six official co-productions: four features (including two three-way co-productions), one documentary and one TV drama, with combined budgets of \$41 million. Two of the six projects were made under one-off MOU arrangements, prior to the signing of the treaty in 2001.

Overall, Germany has a strong co-production output, with 80 co-productions released in 2011 (the majority with other European partners). Austria was Germany's most active partner in 2009 and 2010, taking over from France, which had dominated the partnerships in 2008.

Government funding for features is available through organisations such as the German Federal Film Fund (an automatic funding system granting a 20 per cent refund on German spend), the German Federal Film Board, the Berlinale World Cinema Fund (€350,000 per year) and a number of regional film funds. In 2011, Germany's available public funds totalled €349 million. Additional assistance for TV productions can be received by partnering with German TV channels, and proposals have been made for regional funding for animation projects.



LORE

Lore (feature, Australia/Germany), the latest film from award-winning writer/director (Somersault), had its world premiere at the Sydney International Film Festival in June 2012, and will be released theatrically in September 2012.

AUSTRALIA/GERMANY CO-PRODUCTIONS				
PROD YR	TITLE	TYPE	AUSTRALIAN PRODUCER	FOREIGN PRODUCER
1987/88	The Prisoner of St Petersburg	Feature	Daniel Scharf Productions Pty Ltd	Panorama Films
1999/00	Backlands	TV drama	Crawfords Australia	Bavaria Films GMBH
2006/07	The Children of the Silk Road ¹	Feature	Bluewater Pictures	Zero Films (Germany) Ming Productions (China)
2007/08	Darwin's Lost Paradise	Documentary	Chapman Pictures Pty Ltd	Monaco Films
2008/09	At World's End ²	Feature	New Holland Pictures Pty Ltd	K% Film (Germany) M&M Productions (Denmark)
2011/12	Lore	Feature	Porchlight Films Pty Ltd	Rohfilms GmbH

1. Denotes three-way co-production with China

2. Denotes three-way co-production with Denmark

IRELAND

Signed in 1998, Australia's co-production treaty with Ireland has produced three official co-productions (one TV mini-series, one children's drama series and one documentary), with total budgets of almost \$22 million.

Ireland made 14 official co-productions in 2011. The majority of Ireland's co-productions tend to be with European partners. (Outside Europe, Ireland has co-production agreements with Canada, Australia and New Zealand, and South Africa is currently being negotiated.) A co-production agreement with Luxembourg was signed recently, but has yet to be ratified.

The industry receives federal funding support from the Irish Film Board which has an annual budget of approximately €16 million allocated across feature

films, TV drama, animation and documentaries. A federal tax rebate of 28 per cent, which can be used for both production and post-production, is also in place. A 2011 report commissioned by the Irish Government recommended both the introduction of a €2 million co-production fund as well as tax incentives for animation projects, as part of a greater emphasis on international markets for the Irish film and TV industry.³

A total of 19 feature films were produced in Ireland in 2011, and expenditure on features in 2011 totalled €125 million. The country's reputation for excellence in animation and post-production is receiving global recognition. There is a high rate of cinema attendance, with the gross box office in 2011 totalling \$112 million.

³ *Creative Capital: Building Ireland's Audiovisual Creative Economy*, a report prepared for the Minister for Arts, Heritage and the Gaeltacht by the Audiovisual Strategic Review Steering Group, April 2011

AUSTRALIA/IRELAND CO-PRODUCTIONS				
PROD YR	TITLE	TYPE	AUSTRALIAN PRODUCER	FOREIGN PRODUCER
1996/97	Kings in Grass Castles	TV drama	Barron Entertainment Ltd	Crannog Film and Television Productions
1998/99	The Irish Empire	Documentary	Hilton Cordell & Associates Pty Ltd	Little Bird Ltd
2003/04	Foreign Exchange	TV drama (children's)	Southern Star Entertainment Pty Ltd	Magma Films

ISRAEL

Since the Australia/Israel co-production treaty was signed in 1997, only one co-production (animated feature *\$9.99*) has been made to date.

While Australia/Israel co-productions have been minimal, Israel continues to collaborate with other international partners. From 2001 to 2010, Israel made 64 co-productions, and 11 agreements with partner countries are in place (with France and Germany the most active).

Although there are no local content requirements for film or TV, the Israeli Government provides several film and TV funding schemes, the largest of which, the Israeli Film Fund, has an annual budget of \$6 million. A 20 per cent tax offset is also in place. As a result, production output remains healthy, with 20 Israeli feature films produced in 2009 and 16 in 2010. Approximately 400 hours of TV drama, 120 hours of documentaries and 10 hours of animation are produced each year for TV.

Despite being a relatively small country in terms of population (7.4 million) and cinema admissions (10 million in 2010), Israel has a 10 per cent domestic share of box office, 10 production studios, 30 post-production facilities and a climate conducive to location filming for much of the year.

AUSTRALIA/ISRAEL CO-PRODUCTIONS				
PROD YR	TITLE	TYPE	AUSTRALIAN PRODUCER	FOREIGN PRODUCER
2006/07	\$9.99	Feature	See-Saw Films Pty Ltd	Lama Productions Ltd

ITALY

The Australia/Italy co-production treaty was signed in 1993, but no co-productions have resulted from the treaty to date – the three-way Australia/Canada/Italy feature *On My Own* was made in 1990, prior to the treaty being signed, with Italy coming in as a partner through the Canada/Italy Treaty.

Between 2009 and April 2012, Italy made 91 co-productions with its other international partners. The vast majority of these were with European partners including Switzerland, France, Germany, Belgium and Spain. Co-production output with non-European countries remains low, due to factors such as language differences, the needs of the local market and limits to the use of tax credits.

Several federal and provincial funding schemes are in place in Italy, with direct state funds totalling €76.5 million in 2012. In addition, federal tax credits ranging from 10 to 40 per cent are also available for both national and foreign productions helping to ensure that overall production remains high. In 2011, 155 feature films (including co-productions) were produced, with total production expenditure of €423 million. Cinema admissions totalled 112 million and domestic share increased to 36 per cent of box office in 2011, in line with the ongoing trend of Italian films succeeding at the domestic box office. Rome, the county's production base, also has studios capable of servicing two or three big-budget productions simultaneously.

\$9.99

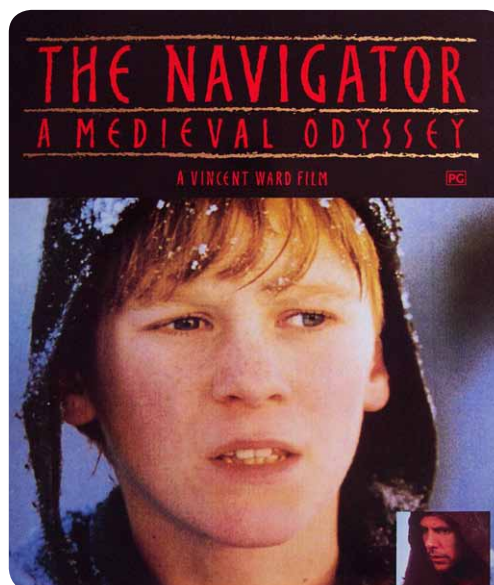
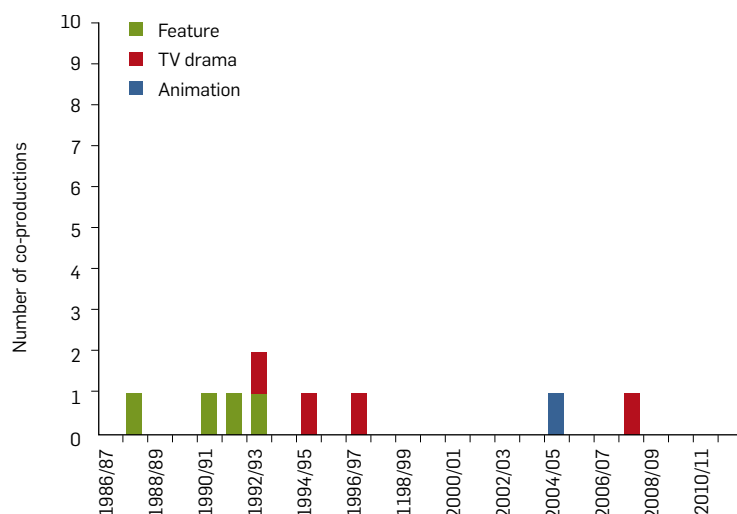
The animated feature film for adults *\$9.99* (feature, Australia/Israel) premiered at the Toronto International Film Festival in 2008. It had multiple international festival screenings, including Pusan, Stockholm, Stuttgart, and both Sydney and Melbourne international film festivals in Australia, as well as screening at cinemas in the US, France and Portugal.

AUSTRALIA/ITALY CO-PRODUCTIONS				
PROD YR	TITLE	TYPE	AUSTRALIAN PRODUCER	FOREIGN PRODUCER
1990/91	<i>On My Own</i> ¹	Feature	Rosa Colosimo Pty Ltd	Ellepi Film (Italy) Alliance Communications Corporation (Canada)

Notes: 1. Denotes three-way co-production with Canada



NEW ZEALAND



The first Australia/New Zealand co-production was *The Navigator: A Medieval Odyssey* (1987/88). Since then the MOU (current version signed in 1994) has produced a total of nine official co-productions – three more feature films between 1990 and 1993, and intermittent TV production since then (all children's programs).

New Zealand has no formal official co-production guidelines beyond the recognised key principles of the co-production structure, enabling maximum flexibility in assessment. In the period between 2009 and 2011, 10 official New Zealand co-productions (four features, six TV series) were produced.

Thirteen domestic features were produced in 2011, of which eight were co-financed by the New Zealand Film Commission, the government body that provides equity investment for feature films with 'significant New Zealand content'. In addition, several incentive schemes have been put in place by the government, such as the Large Budget Screen Production Grant (LBSPG), PDV Grant and the Screen Production Incentive Fund (SPIF), providing cash grants ranging from 15 to 40 per cent. The various funding programs on offer are considered some of the most straightforward and responsive schemes in the world.

The high New Zealand dollar has played a significant role in keeping internationally funded production, including co-productions, down over recent years. (To this end, government intervention was required to ensure *The Hobbit* remained a New Zealand production.)

New Zealand boasts highly experienced crews, sophisticated post-production, sound mixing and visual effects crews and facilities (including Peter Jackson's state-of-the-art facilities and Weta workshop), and the industry can accommodate a small number of big-budget films simultaneously.

Globally, New Zealand is a comparatively small market, with a total population of 4.4 million and 1.6 million TV sets. Cinema admissions are relatively healthy though – New Zealand's box office gross for 2011 was NZ\$161.8 million.

THE NAVIGATOR: A MEDIEVAL ODYSSEY

The Navigator: A Medieval Odyssey (feature, Australia/NZ) screened in Competition at Cannes Film Festival in 1988. It had multiple international festival screenings and award wins (including Best Film at London Film Festival 1988), won six AFI Awards in 1988 including Best Film and Best Director, and has screened at cinemas around the world including the US, Brazil and throughout Europe.

AUSTRALIA/NEW ZEALAND CO-PRODUCTIONS				
PROD YR	TITLE	TYPE	AUSTRALIAN PRODUCER	FOREIGN PRODUCER
1987/88	The Navigator: A Medieval Odyssey	Feature	Arenafilms Pty Ltd	New Zealand Film Commission
1990/91	Secrets	Feature	Victorian International Pictures Pty Ltd	Avalon Studios Production
1991/92	Alex	Feature	Total Film and Television Pty Ltd	Isambard Productions
1992/93	Deepwater Haven ¹	TV drama (children's)	Beyond Productions Pty Ltd	South Pacific Pictures (New Zealand) F Productions (France)
1992/93	Cops and Robbers	Feature	Total Film and Television Pty Ltd	Isambard Productions
1994/95	Mirror Mirror	TV drama (children's)	Millennium Pictures Pty Ltd	The Gibson Group Limited
1996/97	Mirror Mirror 2	TV drama (children's)	Millennium Pictures Pty Ltd	The Gibson Group Limited
2004/05	Staines Down Drains	Animation (children's)	Yoram Gross Productions	Traction Inc Limited
2007/08	Time Trackers	TV drama (children's)	Taylor Media	The Gibson Group Limited

Notes:

1. Denotes three-way co-production with France

SINGAPORE

Singapore is one of Australia's most recent co-production partners, with the treaty signed in 2007. Since then four co-productions have been produced – one feature, two animated children's series (including one three-way co-production with Canada) and one documentary – with combined budgets totalling over \$32 million.

Singapore currently has co-production treaties with five countries (Australia, China, Canada, New Zealand and Korea) as well as MOUs with six more. Direct government funding comes from the Media Development Authority and Singapore Film Commission. Fourteen domestic features were produced in 2010, with an estimated production expenditure of US\$22.4 million.

Singapore has high levels of digital and post-production expertise and infrastructure. In recent years the government has increased its support of international co-productions, seeing both their financial advantages and the opportunities for providing training to the local industry. The newly created Mediapolis, a 19-hectare state-of-the-art media hub that includes two large studios and post-production facilities, was developed with the aim of establishing Singapore as the 'Hollywood of Asia'.



With a population of 4.6 million and around 1.1 million TV sets, Singapore remains a relatively small global market, although cinema attendance is quite high, with the 2011 box office gross totalling US\$151.3 million.

Australia has identified Singapore as an important co-production partner within Asia. In 2011, a delegation attended the ScreenSingapore conference to assist Australian filmmakers build relationships with local producers.

BAIT

The thriller *Bait* (feature, Australia/Singapore), Australia's first 3D co-production, is due for release in September 2012.

AUSTRALIA/SINGAPORE CO-PRODUCTIONS				
PROD YR	TITLE	TYPE	AUSTRALIAN PRODUCER	FOREIGN PRODUCER
2007/08	Zigby ¹	Animation (children's)	ASE Studios Pty Ltd	Zebra (I) Productions Inc (Canada) Big Animation Pty Ltd (Singapore)
2010/11	Guess How Much I Love You	Animation (children's)	SLR Productions	Scrawl Studios
2010/11	Bait	Feature	Story Bridge Films Pty Ltd	Blackmagic Design Films Pty Ltd
2011/12	Gallery of Everyday Things	Documentary	Everyday Things Productions Pty Ltd	Infinite Frameworks

Notes: 1. Denotes three-way co-production with Canada

SOUTH AFRICA

South Africa is Australia's newest co-production partner, with the treaty signed in 2010 and coming into effect in August 2011. As yet, no official co-productions have gone into production.

South Africa made 76 co-productions between the signing of its first treaty with Canada in 1997 and 2011. Total co-productions almost doubled in 2011, up to 17 from nine in 2010.

South Africa's seven partner countries are Canada, Italy, Germany, UK, France, New Zealand and Australia (the last three signed treaty agreements in 2011). Until 2008, Canada was South Africa's longest-running and most active partner country; however, since 2009 Germany has been

the strongest, with 12 productions made in 2011.

TV series made up 47 per cent of all co-productions in 2011, with features representing 41 per cent. Documentaries and telemovies made up another 6 per cent each.

The industry receives support from government funding organisations, such as the National Film and Video Foundation, with public funding totalling €19.2 million. Federal rebates of 15–35 per cent are in place for both film and TV. These have the advantage of being paid in stages, and thus can be used as cashflow. Further improvements were made in 2011 with the removal of the rebate cap.

In 2011, 22 feature films (including co-productions) were made, with combined production expenditure of €45.5 million, and an average budget per film of €893,000. Though not as well developed in infrastructure as other international partners, South Africa's strong commercials industry has ensured a small but skilled workforce, and the new Cape Town Film Studios can handle up to four large-scale productions simultaneously.

With a population of 50 million, including 7.5 million TV households, South Africa offers a significant TV market for co-productions through its local content quotas. Cinema admissions totalled 26 million in 2011, and the domestic share was 11 per cent.

UNITED KINGDOM

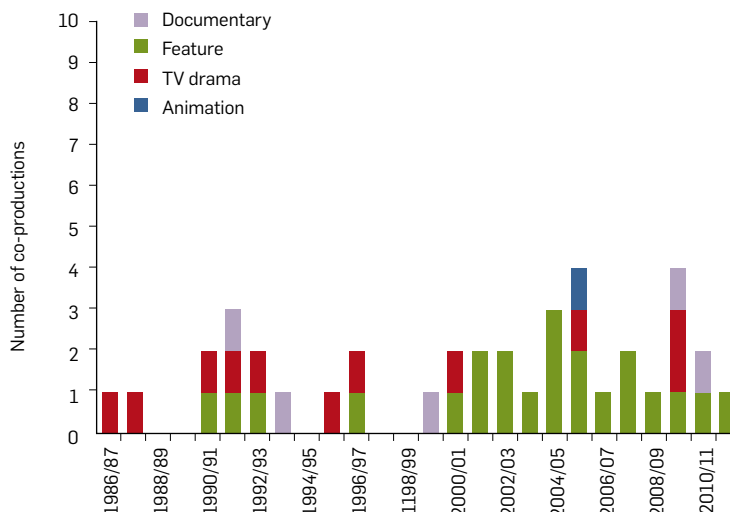
Australia's first official co-production, telemovie *The First Kangaroos*, was made with the UK in 1986 under a one-off MOU. The treaty was subsequently signed in 1990, and the UK has been Australia's second most active co-production partner, after Canada.

A total of 39 official co-productions have resulted, with combined budgets totalling \$453 million. Features have been the foundation of Australia/UK co-production activity, making up more than 50 per cent of all projects to date, and with at least one produced per year over the last 12 years. The majority of the remaining co-productions were TV drama.

The UK has nine official international partners – Australia, Canada, France, India, South Africa, Israel, New Zealand, Jamaica and the occupied Palestinian territories. The UK is also a signatory to the European Convention on Cinematographic Co-production – allowing them to co-produce with European partners bilaterally and multi-laterally. A treaty with Morocco has been signed and is awaiting ratification. Outside of Europe, Canada and Australia have been the UK's most active partner countries.

Overall UK co-production output fell to 21 titles in 2010 from 27 in 2009, although UK expenditure increased from £36 million to £54 million. These output levels are low when compared to the previous 10 years, which peaked in 2005 with 106 co-productions. In 2010, 79 domestic features were produced, with a combined production value of £175.8 million, down from 87 in 2009.

Direct government support currently comes in the form of the British Film Institute Film Fund, with an annual budget of £18 million, and the Prints and Advertising Fund. Both are funded by the National Lottery. UK Film Tax Relief, which can be worth up to 25 per cent, is available to producers of British qualifying films and co-productions. The UK's Enterprise Investment Scheme (EIS) offers a number of different tax reliefs. EIS can be responsible for funding 100 per cent of a film or TV program.



With a population of 62.6 million people, including 27 million TV households, the UK provides a considerable market for film and TV. Cinema admissions in 2011 totalled 171.6 million and films produced in the UK had a 36 per cent share of the global box office in 2011, up from 24 per cent in 2010. TV broadcasters are required to meet a 10 per cent independent production quota, providing opportunities for co-productions. The UK also boasts a large pool of highly experienced, award-winning crews and state-of-the-art production studios and PDV infrastructure.

Most recently, the strengthening of the Australian dollar against the pound in recent years has been both an advantage and disadvantage in terms of co-production activity between Australia and the UK, with a high dollar making it easier to raise the Australian portion of the budget, but increasing all the costs associated with Australian expenditure.

The UK Film Policy review released in 2012 identified the need for the UK Government to continue to monitor the effectiveness of the UK tax regime for co-productions.



DEAD GORGEOUS

Dead Gorgeous (children's TV drama, Australia/UK) has screened in multiple territories throughout Europe and has a second series in development.

Partner profiles

AUSTRALIA/UK CO-PRODUCTIONS				
PROD YR	TITLE	TYPE	AUSTRALIAN PRODUCER	FOREIGN PRODUCER
1986/87	The First Kangaroos	TV drama	Roadshow Coote & Carroll Pty Ltd	Channel Four International
1987/88	The Four Minute Mile	TV drama	Southern Star Entertainment Pty Ltd	Centre Films Ltd
1990/91	Map of the Human Heart ¹	Feature	Vincent Ward Films Pty Ltd	Working Title Films (UK) Sunrise Films Ltd (Canada)
1990/91	Children of the Dragon	TV drama	Southern Star Xanadu	Zenith Entertainment
1991/92	Diamond Empire	Documentary	Independent Communications Associates Pty Ltd	British Broadcasting Corporation
1991/92	No Worries	Feature	Palm Beach Pictures Pty Ltd	Initial Film And TV Ltd
1991/92	Frankie's House	TV drama	Roadshow Coote & Carroll Pty Ltd	Initial Film And TV Ltd
1992/93	Sirens	Feature	Samson Productions Pty Ltd	Sarah Radclyffe Productions Ltd
1992/93	Stark	TV drama	Cascade Ash Productions	British Broadcasting Corporation
1993/94	Ernie Dingo's Kimberley	Documentary	Independent Communications Associates Pty Ltd	BBC Television London
1995/96	The Bite	TV drama	Palm Beach Pictures Pty Ltd	Warner Sisters Film & TV Limited
1996/97	Welcome to Woop Woop	Feature	Unthank Films Pty Ltd	Scala Productions Ltd
1996/97	Moby Dick	TV drama	Nine Films and Television Pty Ltd	Whale Productions Limited
1999/00	Quest for Gold	Documentary	Guinness Entertainment	Essential TV Ltd
2000/01	Charlotte Gray	Feature	Pod CG Pty Limited	Ecosse Films
2000/01	Do or Die	TV drama	Southern Star Entertainment Pty Ltd	Warner Sisters Film & TV Limited
2001/02	Black and White	Feature	Duo Art Productions	Scala Productions Ltd
2001/02	Ned Kelly	Feature	Kelly Gang Films Pty Limited	Sunshine Films Limited
2002/03	Love's Brother	Feature	Great Scott Productions Pty Ltd	Sarah Radclyffe Productions Ltd
2002/03	The Night We Called it a Day	Feature	Night and Day Films Pty Ltd	Scala Productions Ltd
2003/04	The Oyster Farmer	Feature	Anthony Buckley Films Pty Ltd	Oyster Farmer (UK) Ltd
2004/05	Opal Dream	Feature	Sherman Pictures Pty Ltd	Academy Films (Pobby and Dingan) Ltd
2004/05	Like Minds	Feature	Bluewater Pictures	Gunpowder Films
2004/05	The Proposition	Feature	Jackie O Productions Pty Ltd	Autonomous Films
2005/06	Five Minutes More	Animation (children's)	Buster Dandy Productions	Snow River Media Pty Ltd
2005/06	Gone	Feature	WBP Backpacker Pty Ltd	Middle of Nowhere Productions Ltd (subsidiary of Working Title Films)
2005/06	Voodoo Lagoon	Feature	Martin Brown Films Pty Ltd	Legaba Productions
2005/06	Tripping Over	TV drama	Corner Store Films Pty Ltd	Channel 5 Broadcasting Ltd
2006/07	Death Defying Acts	Feature	Macgowan Films Pty Ltd	Zephyr Films Ltd
2007/08	Bright Star	Feature	Jan Chapman Productions	Brightstar Films Ltd
2007/08	Triangle	Feature	Pictures in Paradise	Triangle Films Limited
2008/09	The Boys Are Back	Feature	Southern Light Films Pty Ltd	Tiger Aspect Pictures (SPV) Limited
2009/10	Dead Gorgeous	TV drama (children's)	Burberry Productions	Coolabi Productions Ltd
2009/10	Me and My Monsters	TV drama (children's)	Sticky Pictures Pty Ltd	Tiger Aspect Pictures (SPV) Limited
2009/10	Great Barrier Reef	Documentary	Digital Dimensions	British Broadcasting Corporation
2009/10	Oranges and Sunshine	Feature	See-Saw Films Pty Ltd	Sixteen Films
2010/11	Lachlan Macquarie: The Father of Australia	Documentary	Intomedia Pty Ltd	Caledonia TV Productions Ltd
2010/11	Singularity	Feature	Singularity Productions Pty Ltd	Wildkite Films Ltd
2011/12	The Railway Man	Feature	Railway Man Pty Ltd	Railway Man Ltd

Notes:

1. Denotes three-way co-production with Canada



Australian Government

