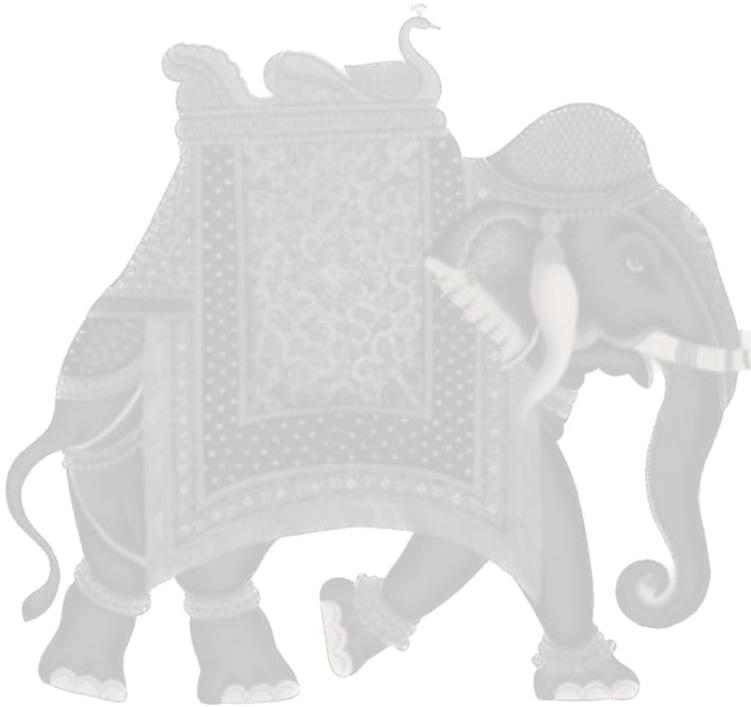


INDIA NEW ZEALAND SCREEN OPPORTUNITY 2025

RENEWED SHARED INTERESTS IN INDIA





ATTRACTING SCREEN PRODUCTION From India to Waitaha Canterbury

THIS IS A PAPER PREPARED BY

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INDIA NEW ZEALAND SCREEN OPPORTUNITY 2025 – Paper

It is with great pleasure that I introduce the "India-New Zealand Screen Opportunity 2025" research paper, which explores the potential for deepening collaboration between our two nations in the realm of screen production. The relationship between India and New Zealand is built on strong historical and cultural ties, and we are now presented with a unique opportunity to expand this partnership into the world of film and screen production.

This paper highlights the immense potential of the co-production treaty between India and New Zealand and underscores the significant economic and educational opportunities that can emerge from further engagement between both sides in the screen industry. Through the efforts of Ms Petrina D'Rozario, Head of Screen Canterbury NZ, this research provides valuable insights into how we can build stronger connections with Indian producers, foster skill development, and leverage both India and New Zealand's attractive financial incentives for international productions.

I hope this paper serves as a catalyst for future collaboration between our countries, creating a thriving and mutually beneficial screen industry that benefits both India and New Zealand.

Neeta Bhushan
(Neeta Bhushan)

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EXECUTIVE SUMMARY

The purpose of this paper is to explore the opportunities and potential economic benefits that would result from increasing the number of Indian productions to Waitaha Canterbury in the first instance and Aotearoa New Zealand in the second. We have a co-production treaty with India that is currently, rarely utilised. Petrina D’Rozario, the manager of Screen CanterburyNZ, embarked on a trip to Mumbai and Hyderabad to meet with influential producers and film professionals with the purpose of understanding their appetite for rebuilding our screen production relationship. She also explored opportunities for our countries to collaborate in the education space which could provide unique skill development opportunities for students in both countries. We explore the shared history of both countries, the development and recent economic position of the New Zealand and Indian screen industries, as well as information on the current NZ financial incentive - a critical piece to the international attraction puzzle. We then breakdown feedback from interviewees to provide a snapshot of key drivers and the tactics needed to meet Indian production needs.

INTRODUCTION BY PETRINA D’ROZARIO



Prior to joining Screen CanterburyNZ in 2022, I worked in the Indian film industry for over a decade, including as COO of Purple Pebble Pictures for Priyanka Chopra. I instinctively wanted to build a stronger relationship between the New Zealand and Indian screen sectors, and voiced my intention to reach out to my screen sector contacts to discover key factors for attracting them to Aotearoa for filming purposes. I discovered a book written by Sekhar Bandyopadhyay who cited an article by Rebecca C.M. Kunin titled “A Stormy Affair” which intrigued me. The story of New Zealand’s relationship with India reads much like a dramatic love story that ends on a “to be continued” note, much like a series you want more of!

The story starts with a strong attraction that led to over 100 Indian films being shot in Aotearoa New Zealand between 1993 and 2003. After this, production all but completely stops. In the 10 or so years since, we average an Indian production every other year, if that, and very little interaction between our two great nations in regards to screen. The point of this project is to uncover what happened to cause this breakdown and more importantly to ascertain what steps, if any, can be taken to reignite this once thriving relationship.

2024 BEES SAAL BAAD (TWENTY YEARS LATER)

In this paper, we will outline the initial research conducted into revitalising the screen production relationship between India and Aotearoa New Zealand, with a focus on Waitaha Canterbury specifically. There is no doubt that India is a bankable co-production partner from a revenue perspective, so I flew to India to meet with producers, directors, guild managers, and other decision-makers to determine what it would take to re-establish a working relationship. With an extensive network of connections, I was uniquely positioned to personally contact experienced producers of mid to high-budget screen content in India; specifically in Mumbai and Hyderabad.

A questionnaire including 45 inquiry points was designed by Get Marketing to support gathering information on the background of the interviewee, how they identified a filming destination, what it would take for them to consider Ōtautahi Christchurch and Aotearoa New Zealand as viable filming destinations, and ways to make New Zealand more visible to decision-makers based in India.

My first stop was Mumbai, which is the capital city of the state of Maharashtra and India's most populated city. Mumbai has a long and storied history of filmmaking and is where 'Bollywood', or more appropriately, Hindi Cinema has its base. Professional screen practitioners are highly skilled and considered global innovators in screen-related technology. WētāFX's primary competitor, Prime Focus, is based in Mumbai, where over 850 films are made in the region per year.² They are at the top of visual effects worldwide and are potentially a good fit to develop a professional and educational information and training exchange.

The second location, Hyderabad, is the capital of southern India's Telangana state. It is also renowned for its film production expertise and output. It is the home of Ramoji Film City which is an integrated film studio facility that covers 674 hectares of land making it the largest film studio complex in the world.

I was able to successfully leverage my network by scheduling meetings with 27 individual producers and filmmakers in Mumbai - including the head of the producer's guild. I hosted a group meeting consisting of 20 additional producers on behalf of RFONZ (Regional Film Offices of New Zealand) members to establish the benefits of filming in various centres throughout New Zealand.

Afterwards, I headed south to Hyderabad where I conducted meetings with 12 different producers and through the Telugu Chamber of Commerce, was able to set up another group meeting with 15 producers. Many suggestions were made around how to develop an effective partnership, with nearly every producer agreeing on what would make New Zealand an attractive filming destination.

LET'S CAPTURE THE HEARTS OF A BILLION PEOPLE!

A STORIED HISTORY

India and New Zealand have an established history going back over 30 years with the first reports of Indian location shoots occurring in the mid-1990s. At the time, the combination of the low New Zealand dollar and the extensive alpine region around Central Otago made the South Island an optimum site for Indian filmmakers.

Between 1993 and 2003, over 100 Indian crews shot parts of their films in Aotearoa with the majority of these crews coming from the South Indian film industry based in Chennai and Hyderabad. As of 2024, these numbers are still exceptionally low and we continue to average hosting 1 production every 24 months. Indian film 'Kaho Naa Pyaar Hai' (Say It Is Love), filmed around Queenstown and Christchurch in the late 1990's. It opened with record numbers at the box office making it the top grossing film of 2000 in India. It is estimated that half of India's population - over 500,000,000 people - have seen this film, which showcased the South Island as both a filming location and a tourist destination. The years 2001 to 2002 saw a sharp increase of Indian visitors to New Zealand and by 2002, over 17,270 Indian tourists visited the South Island - a significant increase from the approximately 4000 Indian tourists in years prior. By 2001 student numbers rose to over 1000 and by 2002, those numbers topped 1700. New Zealand raced ahead of Canada to become the fourth most popular destination for Indian Tertiary Students. All of these outcomes can be attributed to that one film.

A FILM DESTINATION TO "RULE THEM ALL"

Aotearoa New Zealand has an incredible reputation worldwide for "punching above its weight" when it comes to the films we make. Some of the world's most successful filmmakers hail from our shores including Sir Peter Jackson, Taika Waititi - ONZM, Dame Jane Campion, Lee Tamahori, Andrew Adamson - MNZM, and Niki Caro - MNZM, to name just a few. All have produced content with a uniquely New Zealand flair while engaging and enthralling international audiences.

'The Lord of the Rings' trilogy is arguably the most famous content that has been filmed here and has become synonymous with Aotearoa itself. The stunning locations and scenery on show are as much a character as Frodo himself. The imaginative use of land around both the North and South Islands single-handedly created a tourism boom that still has an effect in this present day. The annual tourist influx to New Zealand grew from 1.7 million in 2000 to 2.4 million in 2006 - which is over 40% - an increase directly attributed to the film franchise³. Since 2004, an average of 47,000 international visitors per year visit various locations associated with the trilogy⁴, while 1 out of 6 cite 'The Lord of the Rings' as why they've chosen New Zealand as a destination⁵.

Tourists aren't the only people attracted to Aotearoa as a direct result of screen production activity. Several international filmmakers now call New Zealand home including James Cameron, the second-highest revenue grossing director of all time. Cameron initially set himself up in Wellington for production of Avatar and stayed on for Avatar: The Way of Water and will continue to stay for three upcoming sequels. Avatar is the highest grossing film of all time with a worldwide gross of \$2,923,706,026 USD and Avatar: The Way of Water is in third place with a worldwide gross of \$2,320,250,281 USD⁶.

The main quality that brought him to New Zealand was the technical expertise on offer at WētāFX, which he has called "the best in the world"⁷. This venture initially brought in more than \$100 million NZD to the Wellington economy, of which \$100,000 per week was spent on accommodation, taxis, and food alone⁸ - an unarguably huge economic boost. The production of Avatar: The Way of Water in addition to Avatar has seen the creation of thousands of jobs and a total of over \$500 million injected into the economy⁹. Avatar 3, the sequel to Avatar: The Way of Water is currently in post-production and scheduled for release in 2025 with two additional Avatar sequels slated for production and delivery in 2029 and 2031, respectively. It is likely that the economic benefit will top \$1.2 billion by the release of the third sequel. Cameron's films are a significant contributor to the New Zealand film industry's GDP of \$3 billion NZD, annually.

NOT JUST A 'PRETTY FACE'

New Zealand is known globally for raw, unparalleled beauty and the close proximity within which, completely different geographical features can be located. It is often a key driver in attracting international productions and is at the heart of most domestic location shoots traveling between islands. We have some of the world's most diverse and remote yet accessible scenery, however, it's critical to note that our beautiful landscapes were not what initially caught James Cameron's eye. The technical expertise of WētāFX whose partnership with Wētā Workshop - designers and manufacturers of creatures, specialty props, and specialty costumes - has set a global standard that engenders respect and more importantly, confidence.

There are a handful of companies around the globe that can achieve the innovative, outstanding, award-winning visuals that WētāFX has created. At the top of deal-tracking intelligence tool Tracxn's list is Prime Focus located in Mumbai, India¹⁰ with a score of 65/100. Tracxn rates these companies by looking at attributes like the "founder's profile, funding raised, type of investors, peer recognition, growth achieved, & market potential. It assigns significant weight to growth, innovation and quality of execution in order to identify breakthrough companies."¹¹ Second on the list is Visual Data (Burbank, California USA) with a score of 53/100, third is Coffin Communications (Guro-gu, South Korea) scoring 32/100, with WētāFX rounding out the top four with a score of 33/100.

Considering WētāFX takes fourth position on the list, it's interesting to note that though the second place option is located in his resident state, California, Cameron still chose to come to Aotearoa, entrusting the team at WētāFX with the development and execution of his vision. Technical expertise was his first consideration, but money was his second.

SHOW ME THE MONEY

Cameron was asked to be the keynote speaker at the annual SPADA (Screen Production and Development Association) conference in November of 2023. Cameron was interviewed by John Campbell and the two spoke for nearly an hour about the incredible and vibrant production ecosystem that has been created in Aotearoa. However, Cameron made it clear that even though the innovation and technical skill of WētāFX team members was the initial draw, it was the New Zealand Screen Production Rebate for International Productions that gave him the final push to Aotearoa. In December of 2013, the rebate scheme was pushed from 15% to 25%, a move that ensured Avatar would come to and stay in New Zealand. He would not have been able to convince 20th Century Fox to agree to being based in Wellington without the rebate.¹²

New Zealand has two production rebate schemes. The New Zealand Screen Production Rebate for New Zealand Productions¹³ (SPR) and The New Zealand Screen Production Rebate for International Productions¹⁴. The purpose of the domestic rebate scheme is quoted as follows:

- To build the sustainability, scale and critical mass of the domestic film industry and support the development of New Zealand creatives.
- To provide cultural benefits to New Zealand by supporting the creation of New Zealand content and stories.”

The purpose of the NZPR for International Productions is “to incentivise the production of foreign and domestic large budget films, television and other format productions in New Zealand in order to provide economic and industry development benefits to New Zealand.”

The International rebate also allows for a Post-production, Digital, and Visual Effects (PDV) rebate the purpose of which is to “specifically foster capacity and new business development for large budget PDV Productions in New Zealand.”

The Qualifying New Zealand Production Expenditure (QNZPE) outlines “eligible spend incurred by the applicant on the production in New Zealand. In general, this means:

- Services provided in New Zealand;
- The use of land located in New Zealand;
- Goods purchased, hired or leased in New Zealand, provided they are sourced from within New Zealand;
- Goods sourced from overseas, provided those goods are not otherwise available in New Zealand, are located in New Zealand during the making of the production and are purchased, hired or leased from a New Zealand Resident who typically supplies that type of good.
- QNZPE also includes the fees and expenses of non-New Zealand residents who work on the production in New Zealand, provided (in the case of non-cast members) they work on the production for at least 14 days in total.”¹⁵

The QNZPE is the mechanism that ensures that before a rebate is given to an international production, they must establish exactly how they intend on utilising New Zealand people, products, and services where possible, or they won’t be eligible to receive the rebate. The NZSPG for international productions plays an absolutely critical role in attracting high-value projects from countries that generate large amounts of screen content, such as India.

A POWERHOUSE OF ALL THINGS SCREEN

India is a filmmaking powerhouse. In 2023, it was third globally in box office sales with revenue of \$1.50 billion USD¹⁶, behind only the USA/Canada with a combined revenue of \$9.07 billion USD, and China whose revenue tops out at \$7.71 billion USD. India, however, has the highest box office admissions at cinemas so consistently has the world's largest cinema-going audience.¹⁷ India produces over 2750 films per year with an average budget of \$15,802,131 which is fifth in the world.¹⁸ Over 2.5 million people are employed in supportive or indirect roles.¹⁹

"Revenue in the Cinema market is projected to reach US\$4.63bn in 2024. Revenue is expected to show an annual growth rate (CAGR 2024-2029) of 5.50%, resulting in a projected market volume of US\$6.05bn by 2029. In the Cinema market, the number of viewers is expected to amount to 653.2m users by 2029. User penetration will be 38.7% in 2024 and is expected hit 43.5% by 2029²⁰."

"The Film, TV and Broadcasting sector has usually outperformed India's GDP. A FICCI-EY report of 2021 shows that the media and entertainment sector in India is expected to reach INR1.73 trillion (GBP18bn) by 2021 and then grow at a rate of 13.7% to reach INR2.23 trillion (GBP23bn) i.e. NZ\$46B by 2023. Television is the largest segment and is expected to account for 40% of India's media market by 2024... India currently ranks first worldwide in terms of annual film output and is the world's second largest TV market after China."²¹

To reiterate, re-invigorating our relationship with India for both location filming and co-production purposes is certainly worth exploring as the revenue-earning potential for Waitaha Canterbury and Aotearoa is high. We have, in the past, experienced regular production activity coming from India, but despite a co-production treaty being signed in 2011, only one film has been co-produced in the last 12 years and location filming has dropped down to one production every other year.

Nitin Tej Ahuja, CEO of the Producers Guild of India explains "While New Zealand is there [in the minds of people] it's not an unknown country, especially with its Cricket relationship; and while Kaho Na Pyaar Haan (Say It is Love) was a hugely popular film, and films like Lord of The Rings and The Power of Dog goes to show that it's a very film friendly and beautiful location, one assumes it's not lucrative enough"

He explains that the reason the UK is one of India's most popular filming destinations is primarily due to its incentive scheme - it has a very low threshold. In many other countries, New Zealand included, the thresholds are high. Larger spending thresholds cater to higher budget films, typically financed by Hollywood studios, which aren't viable for the majority of Indian producers. High spending thresholds in conjunction with travel distance and general lack of infrastructure make Aotearoa less attractive.

Nitin goes on to explain, 'it's all a commercial game, and if it's financially worth your while you would go there, unless of course it's a demand of the script where the visuals demand for a specific location. If it's just a look of a European country... a generic look, then we would go where we get the best deal!'

UK, Fiji, and Australian incentives dominated most conversations with producers. Thirupathi Venkatesh, better known by his stage name Rockline Venkatesh, has been an Indian actor and producer in the Kannada film industry (South India) since 1992. He was able to shed light on his experience of filming in New Zealand during the high production years between 1997 and 2003. He went about finding suitable locations for his films in the following manner:

"Having produced about 50 films, I love filming in foreign locations, and I look for scripts that cater to this, unless it's a rural India story. But we are famous for song sequences in foreign locations and that took me to New Zealand in 2002 and we shot in Christchurch and Auckland, amongst the 4 locations, with the help

of a local guide. While tourist spots are famous, I avoided them and looked for unexploited locations even if that meant we needed to travel 2 to 3 hours everyday from the city for 2 shots... the cost factor is the main reason [to not return]. I have shot three films in Switzerland and there is no country like Switzerland and their cooperation extended to filmmakers for locations - a very film friendly country. We need the same support from New Zealand.

On hiring local crew:

"While we film only 10-15% of the film abroad, we prefer to take our own HODs [Heads of Department] and technicians given the language of the film and the continuity of what has [already] been shot. We hire locals for specific requirements where there is a skill gap and we require their expertise."

He was able to share his thoughts on what would attract him and other producers like him to film in New Zealand once again:

"You need to attract us and tell us why we should come to your country. We know of its... unimaginable natural beauty... this needs to be showcased by you. As producers our first thought of New Zealand is one - costly; two - it's too far. And when producers are in New Zealand, support us for (sic) locations as the rebate is not attractive compared to Canada and Australia, so our last choice is New Zealand. In place of cash incentives offer us [free] locations, internal transport, accommodation, airlines, partnerships for equipment - especially for excess baggage."

The UK introduced a revised incentive scheme for audio-visual expenditure credit (AVEC) or video-game expenditure credit (VGEC) as follows:

- Film, high-end TV and video games will be eligible for a taxable credit at a rate of 34% (equivalent to 25.5% under the previous system)
- Children's TV, animated TV and animated film will be eligible for a taxable credit at a rate of 39% (equivalent to 29.25% under the previous system)²²

Australia has followed suit by increasing its Location Offset from 16.5% to 30%.²³

As many countries are aggressively marketing their offerings to India and countries around the globe, New Zealand - and especially Waitaha Canterbury - must find ways to remain top of mind. Venkatesh suggested having someone on the ground in India advocating and marketing the regions, landscapes, and resources.

NITIN TEJ AHUJA, CEO OF THE PRODUCERS GUILD OF INDIA

As CEO of the Producers Guild of India, Nitin is charged with championing the cause and spearheading the development of the film, television and new media production sector in India. His responsibilities include focusing on policy matters, copyright protection, government regulations, taxation, production incentives available nationally and internationally, cinema tourism, international co-production treaties and exchange programs.

He joined the Guild after a career spanning more than two decades in which he worked across various sectors in the Media & Entertainment industry including film, music, television, radio and publishing.

"Indian films should not be seen through the prism of Hollywood projects in terms of budgets, QPEs etc. However, to offset that are the sheer volumes of productions in India - almost 2000 films produced each year, and over a dozen streaming platforms (including international majors like Netflix, Prime and Apple) that offer decent budgets..so even if NZ can attract a small fraction of production, it's a worthwhile investment. Not to mention the huge knock-on effect it would have in popularising the country on a mass level to Indian and the potential tourism uptick."

CREATIVE INSPIRATION FIRST, MONEY SECOND, LOGISTICS THIRD

How a filmmaker or a storyteller from any discipline generates a story idea is as unique as each individual creative. A story may need to take place in the mountains as it is critical to the plot; it may also be set there to generate a feeling in the audience or to highlight the emotional state of the characters. In some cases, these points can be negotiated as the same creative outcomes can be achieved in the forest for example, but in some cases the location is critical and can't easily be changed. This is an example of how the creative process can drive where a film is shot and is very difficult to influence from an external position.

It is typically after an idea is scripted, producers attached, and the logistics of pre-production underway, that a producer or production manager will begin sourcing locations by contacting location scouts and screen offices for support. Developing a more proactive approach to attraction requires developing a marketing plan that encompasses relationship development in the first instance and ongoing communications in the second, to ensure that the region on offer stays top of mind.

After relationships have been built, understanding film production workflows becomes crucial to solving problems in ways that best support the production team. A robust understanding of the creative, financial and logistical issues they are facing is the best way to ensure initial and repeat engagement, and is at the core of why film producers often work in the screen attraction space. The ability to problem solve in real and meaningful ways, with quick turnaround times, is essential to achieving successful outcomes for all involved.

We are 'selling' Waitaha Canterbury, specifically Ōtautahi Christchurch, in the first instance and the rest of Aotearoa in the second, to producers and filmmakers based in India, which means we need to understand two very specific factors - Indian production workflows and Indian culture.

VISION MEETS REALITY

Having a strong creative vision for a specific location is one thing, and is often at the heart of great cinema, but there are several countries competing for business in the location space. Understanding what problems producers need to solve and also understanding how your location provides those solutions is critical to landing on someone's short list. Knowing these key drivers is critical to developing effective communication and marketing strategies as well as establishing a baseline for expectation management.

Key drivers for Indian Filmmakers are as follows:

- Creative fit
- Robust, competitive incentives that have an easy distribution pathway
- Overall financial viability
- Ease - the process must be simple and easy from beginning to end
- Availability of support people or 'fixers' (typically someone who speaks both languages and understands both cultures)
- Honesty of fixers, crew members, and the support team at the destination
- Availability of affordable production premises, accommodation, and transportation
- Quick turnarounds on visas, permitting, and other permissions
- Capability and expertise of film crew available at destination
- Safety and security

Countries like the UK and Australia that have leapt ahead, have recognized the value in attracting Indian productions. Both countries have put measures in place to specifically address key drivers motivating Indian filmmakers and screen professionals to large success. We can look deeply into their methodologies to glean insights and then tailor them to suit our outcomes.

COMMUNICATION IS THE KEY

The typical communication methods will likely be unsuccessful when attempting to build relationships with successful, working Indian filmmakers. It isn't likely that an email or phone call will be returned if there hasn't been an introduction by someone they know and respect; certainly social media will have no effect. Having an established reputation or coming from a government or professional organisation that is known to them may yield results but both the Head of the Producer's Guild in Mumbai and a producer who is a member of the Producer's Council in Hyderabad made it clear that the best pathway to communicating with their members en masse is by developing a relationship with those professional producer organisations. Indian businesses are relationship-based first and foremost - no matter what size. It is critical to understand this point to make any progress in further discussions.

COMMUNICATION TACTICS & CHANNELS

Based on the information given by multiple producers and the Head of the Producer's Guild in Mumbai, I'm recommending these tactics and channels for consideration.

- Develop a showreel that is bespoke for the Indian market
- Generate assets such as photographs and infographics that highlight information relevant to the Indian market
- Update the current lookbook and include information that is relevant to the Indian market
- Create a presentation utilising the above-mentioned assets that can be given to the main Producers guild in every Indian state, individually
- Create a newsletter that is aimed at producers, directors, and other key creatives in India that goes out to the various Producer's guilds on a regular basis
- Ensure that all communications answer the question "What's in it for them" very clearly
- Treating each individual with respect and care while respecting cultural norms is critical
- Staying in regular contact is highly important for staying top of mind
- Develop an Indian Film Festival that screens Indian features, documentaries, and short films - there was a great deal of interest in this suggestion

EXTERNAL FACTORS ARE EQUALLY IMPORTANT

It's one thing to communicate in a way that the Indian market is prepared to receive. It is equally important that we are able to deliver what is promised. Honesty is highly valued so it is critically important not to oversell or overestimate our capabilities. It would be far better to lose an inquiry that we are unable to facilitate effectively than to push business through that will be unlikely to end successfully. It is this phenomena that has likely played a part in the drought of productions coming to New Zealand to be filmed.

The following factors need to be looked into on a regular and ongoing basis to ensure that the support we offer is fit for purpose or to discover what changes (if any) can be made to make improvements:

- Explanation of our incentive schemes are transparent and easily understood
- Visa processing needs to be quick and easy - "it currently is not, so discussions with central government need to be robust and ongoing
- Local permitting needs to be facilitated effectively and quickly - city councils, regional councils, DOC and similar need ongoing communication from a screen office facilitator or similar to ensure this process is simple and quick
- Provide facilitation support for the Carnet process
- Maintain ongoing relationships with local property owners, managers, and accommodation providers to ensure availability of production office space and accommodation that is temporary (i.e. for a 10 month period vs. 1 year)

EDUCATION IS A STRONG ATTRACTION LEVER.

THE BUSINESS OF EDUCATION

New Zealand already has a strong relationship with India in the education sector as it's traditionally one of New Zealand's largest markets for international education. In 2019, the following statistics were collated by Education New Zealand, "India is New Zealand's second largest market for international education, making up 14% of international students in New Zealand... (behind China at 32%). There were over 17,000 international students from India in NZ... 11% of international students from India studied in Canterbury."²⁴

After the post-pandemic drop in international students, 2023 saw 69,000 international enrollments in total, a 67% increase as compared to 2022.²⁵ Market conditions are currently favorable for Indian students to consider studying in New Zealand specifically.

Indian website Shiksha collates information about various countries and is aimed at Indian tertiary students considering studying abroad. "In 2022, around 120,000 international students were enrolled across eight New Zealand universities along with its ITPs and PTEs. Out of these 120,000 students, only 2,664 were Indian-origin students. With 20,000+ vacancies opening up each year, studying in New Zealand for international students has become one of the preferred choices. The introduction of Green List Occupations in New Zealand after the pandemic has also encouraged international students to study in New Zealand and apply for full-time job roles."²⁶

A fellowship programme was announced in 2023 with joint funding of NZ\$100,000 which allowed 4 New Zealand Fellows to work with the Indian Institute Of Technology Delhi (IITD) during 2023 - 2024 with 2 Fellows from IITD to work with New Zealand universities.²⁷

India is consistently New Zealand's second largest international education market, pandemic years notwithstanding, and these numbers have led to the 'New Zealand - India Education Connect Initiative' led by Education New Zealand in February 2024. Events were held in centres throughout India

including Bengaluru, Chennai, New Delhi, and Ahmedabad. It is important to note that these New Zealand-led initiatives have not yet included a focus on screen.²⁸

All things considered, India is top of mind for many New Zealand tertiary institutions. The facets of doing business in India apply to building relationships for educational purposes as well. Some work could certainly be done in conjunction with Education New Zealand and the ties established through their current initiatives, otherwise it is critical that an initial introduction is made by a mutual or appropriate third party to ensure engagement in the first instance. Again, a person who is of Indian heritage, or a person who speaks the language and understands cultural expectations is critical in the introduction phase. Once a personal connection or relationship has been established, this third party link may not be required on an ongoing basis.

Once a connection is established, it is critical to outline what is being offered and how it will benefit students in India. How is it different or how does it supplement the opportunities they already have? What are the benefits of them coming to New Zealand? It is also critical to understand what benefits New Zealand students will receive if they study in India. Ongoing discussions around expectations, honestly and clearly laid out, is a critical piece to negotiating outcomes for students in both countries. A lack of understanding at any point during this process could create unexpected or unwanted outcomes, which would certainly affect future educational exchange opportunities.

Collated feedback on partnering with Kōawa:

- Kōawa courses are so new, it's hard to know what to expect as no students have graduated yet - this alone will make marketing the course difficult
- Many Indian students would likely do their first 2 or 3 years in India and then come to New Zealand for their last year
- It is critical that Indian students are offered guaranteed work experience and internship opportunities in New Zealand
- It is therefore critical to develop a relationship with producers - in both countries - who are willing to provide opportunities that support these students
- Most students would likely want to stay in New Zealand for at least 2 to 3 years after graduation to get professional experience and knowledge to take back to India
- A suggestion to make a July intake as students don't like waiting for 8 months before they start a course after graduating from 12th board exams in March/April
- A cross-exchange between two organisations would be an ideal way for both to understand each other and could inform course choices and pedagogy
- Cross-promotional credits would be an ideal outcome, if viable
- Student filmmakers could win the opportunity to create a short film for screening in a participating festival in India and/or New Zealand - possibly Mumbai International Festival and New Zealand International Film Festival or Show Me Shorts

A POTENTIAL PARTNERSHIP - WHISTLING WOODS INTERNATIONAL & KŌAWA

Whistling Woods International is a film, communications, and creative arts institute located in Mumbai where programmes offered vary in duration from 1 year to 4 years. Major specialisations in the Media, Communications, & Creative industries are catered for in seven schools housed on campus and include the following: School of Filmmaking, Actors' Studio, School of Animation, School of Design, School of Fashion, School of Media & Communications, and School of Music. The institute is promoted by the Indian filmmaker, Subhash Ghai, from production company Mukta Arts and Film City which is also based in Mumbai, creating potential career pathways for students.

In July 2014, The Hollywood Reporter named Whistling Woods International on its list of "The best film schools in the world"²⁹. Meghna Ghai, President of the school, speaks of the Indian film industry's history, experience, and popularity which provides a solid foundation to build an avenue for education pathways and student exchange programmes. The school currently works with several universities globally to build talent pathways and Ghai has indicated a desire to explore a partnership with Kōawa Creative Technologies Precinct to facilitate a student exchange programme. She has said, "Internships play a very important role in a student's portfolio of experience as they begin to look for work after graduating. And if the student has been exposed to different work cultures, through these exchange programmes, it definitely helps build their confidence when they enter the workforce".

AN INVESTMENT ATTRACTION OPPORTUNITY

Annapurna Studios is an Indian film production company, founded in 1976 by the actor Akkineni Nageswara Rao. It is of particular interest as Rao was a very bankable actor who chose to set up Annapurna in Hyderabad when Chennai was the city with far more production activity. Rao categorically refused to work with producers on any films unless produced in Hyderabad. Many other filmmakers followed his example which was pivotal in the development of Hyderabad as a film destination in its own right.³⁰

“Located in the heart of Hyderabad, India, the 22-acre (8.9 ha) studio mainly provides services for films, including sound stages for set construction, outdoor sets, floors, back-lots, data storage, editing, dubbing, sound effects, visual effects, digital intermediate, Dolby Vision/HDR, stereo and near field mixing, Dolby Atmos sound mixing, 5.1/7.1/9.1 sound mixing, conforming and mastering, HD/UHD/DCP mastering, and screening theaters, among other amenities.”³¹

The Akkineni family launched the Annapurna International School of Film and Media in 2011, which is India’s first non-profit film and media school. One of its biggest selling points is as a film college inside of a film studio, allowing students to learn in a controlled, hands-on environment. The parallels between Annapurna International School of Film and Media and Kōawa are significant and much can be learned from Annapurna’s successes.

A face to face meeting with CV Rao, CEO at Annapurna Studios, led to a conversation around investing in Christchurch as they are looking to expand and diversify into global markets. Currently they are doing their due diligence and visiting different countries to identify a partner. While the decision is another year away, this could be an opportunity for the ChristchurchNZ Investment team to explore.

RECOMMENDATIONS FOR NEXT STEPS

If there is any interest in continuing forward, I would recommend the creation of a SWOT analysis, followed by further research and development to assess the appetite for building this relationship in a manner that would be successful from both an Indian and a New Zealand perspective.

It is clear based on feedback from many producers that though there is an opportunity to rebuild our relationship, we aren't starting from a clean slate. We are building on the back of negative experiences - on both sides - and that will need to be addressed. We have many incredible opportunities to explore from production, tourism, and education perspectives. It could be an ideal opportunity for the ChristchurchNZ Investment and Kōawa commercial teams to explore together.

Immediate next steps:

- **Build on the communications tactics** mentioned above bespoke for the Indian market - showreel, eDM, newsletters, lookbook, presentations, locations gallery

 - **CNZ & SCNZ sign an MoU** with the Producers Guild of India, Indian Motion Pictures Producers Association, & Telugu Chamber of Commerce

 - **Host more India & NZ co-production roundtables** with producers from each country - this could be an online activity in partnership with NFDC - National Film Development Corporation India.

 - **Attend co-production markets** in India especially IFFI Goa and MIFF - both properties of NFDC

 - **Attend FICCI Frames**

 - **Be visible across the various guilds** in South India and Mumbai
- **Host an Indian Film Festival** in NZ to build a cultural understanding between both screen sectors

 - **Advocate** for more New Zealand films to be screened in India

 - **Educate New Zealand** about filming incentives in India and vice-versa

 - **Connect with Annapurna Studios** to evaluate partnership possibilities between Kōawa creative hub

 - **Explore the possibility of a student exchange** programme on short films between SCNZ, Kōawa, & Whistling Wood International

YOU WORK WITH PEOPLE, NOT COUNTRIES

OPPORTUNITY FOR 2025

- NZ to support a screen business delegation to India
 - NZ to support the NZ India International Film Festival to build co-production opportunities and build the relationship in the screen sector.
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IN CONCLUSION

The partnership between New Zealand and India could prove incredibly fruitful, primarily for us. India has an incredible filmmaking history plus a wealth of technical and creative expertise to offer. However, India is a relationship-based economy and this takes priority over all other factors. It is critical to have someone involved who can facilitate introductions and further discussions until such time both parties feel comfortable to continue on without third party involvement. We are in a unique position to build this relationship once again, as communication has been reestablished. From an economic growth perspective, it's certainly worth moving forward now that the conversation has begun, but the real question to ask is whether we're prepared to do what it takes to build correctly.

INDIAN FILM PRODUCER PROFILE

PROFILE:

Age: 50

Work: Producer, decision-makers

Family: Married, children

Location: Mumbai, Hyderabad, Chennai, Bengaluru

KEY DRIVERS

- Creative fit
 - Competitive incentives that have an easy distribution pathway
 - Overall financial viability
 - Ease – the process must be simple from beginning to end
 - Availability of support people or ‘fixers’ (typically someone who speaks a few Indian languages and understand both cultures)
 - Honesty of fixers, crew members and the support team at the destination
 - Availability of affordable production premises, accommodation & transportation
 - Quick turnarounds on visas, permitting and other permissions
 - Capability and expertise of film crew available at destination
 - Safety & security
-

GOALS

- Project produced on time, in budget
- Partners who understand film as a business
- Partners who go the extra mile in terms of logistics including visas, permitting, location support, transportation support
- To be a respected and honoured collaborator

FRUSTRATIONS OF AN INDIAN PRODUCER

- Incentives that are difficult to understand and have hidden clauses around payment
- distributions
- Slow turnaround or denials on visa applications close to project start date/s
- Local permits taking too long - 4 to 6 weeks is far too slow of a turnaround compared to most countries with an active screen industry
- Lack of transparency relating to the permitting process such as different requirements for City Councils, Regional Councils, DOC, and other similar bodies
- No support for the carnet process relating to excess baggage and other gear
- Lack of appropriate, high-quality, short-term production office availability
- Lack of infrastructure such as sound stages
- Lack of crew depth
- Lack of crew awareness around Indian screen protocols

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