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Submission to Australia's New National Cultural Policy

Supporting Australian Cultural Organisations Delivering Diplomacy Abroad

Down Under Film Festival (Europe)

Down Under Film Festival (DUFF) was founded by Australian film enthusiasts living in Berlin. It is a volunteer-run organisation that presents a curated program of Australian and First Nations films to international audiences in Europe. Since our founding, we have grown from a single event in Berlin to a multi-city festival, most recently expanding to Copenhagen in 2024 with the support of DFAT's Cultural Diplomacy Grant. Our mission is to promote Australia's screen culture abroad, support emerging Australian filmmakers, and open new export pathways for Australian creative work.

We welcome the development of a new National Cultural Policy and urge the Government to address a critical structural gap: **the absence of sustained, reliable funding for small and mid-sized organisations delivering cultural diplomacy outcomes on behalf of Australia.**

Challenge: A funding blind spot for international film festivals

DUFF falls between the mandates of Australia's two primary cultural funding bodies. **Screen Australia does not support film festivals operating abroad**, and Creative Australia does not support film festivals or films, referring organisations like ours back to Screen Australia. The result is a structural gap in which an organisation actively promoting Australian screen culture internationally has no natural funding home.

Independent and arthouse Australian films, and in particular First Nations stories, are least likely to secure commercial international distribution. For many of these works, DUFF is their only pathway to international audiences. We are not duplicating work that others are doing; we are filling a gap no other organisation is filling.

Meanwhile, initiatives such as G'Day USA receive considerable Government support, yet Australia's cultural diplomacy focus remains concentrated on the US and UK. Europe - Germany and Scandinavia in particular, a region with strong appetite for independent and arthouse cinema - represent a significant, underdeveloped opportunity for Australian screen exports.

Opportunity: Cultural diplomacy as national infrastructure

Governments globally are increasingly recognising arts and culture as soft power infrastructure - the British Council, Alliance Française, and Goethe-Institut are established models. Australia currently lacks an equivalent sustained mechanism for screen culture abroad. DUFF is filling that void, informally and without guaranteed support.

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Australian embassies and diplomatic missions actively seek to partner with us because our festival directly supports their cultural and public diplomacy mandates. We are delivering foreign policy outcomes on a volunteer basis.

Furthermore, DUFF has secured partnerships with major Australian brands including Tourism Australia, Adina Hotels, and Qatar Airways — demonstrating that our festival generates measurable exposure for Australia's tourism and business sectors. The Australian Government is, in effect, receiving a significant promotional return on minimal investment. That investment should be formalised.

Recommendations

1. Close the funding gap between Screen Australia and Creative Australia for internationally operating Australian film festivals.
2. Establish dedicated, multi-year funding for Australian cultural organisations operating internationally, distinct from competitive general grants.
3. Broaden cultural diplomacy beyond the US and UK to prioritise high-potential territories including continental Europe and Scandinavia.
4. Strengthen coordination between the Office for the Arts, DFAT, and Screen Australia to support organisations already delivering cultural diplomacy outcomes.
5. Recognise volunteer-led organisations as at-risk cultural infrastructure and develop operational support mechanisms to ensure their sustainability.
6. Consider establishing a dedicated Arts and Culture Ambassador to champion Australia's creative sector on the world stage.

Australia's screen culture is world-class. With consistent support, DUFF can do far more — for Australian filmmakers, for First Nations storytellers, and for Australia's standing in the world.

For more information:
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Watch 2025 Event Hightlights

s47F

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National Cultural Policy: Pan Macmillan Australia Submission

From: Managing Director, Pan Macmillan Australia and New Zealand

To: The Australian Federal Government / National Cultural Policy

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Introduction & Corporate Heritage

As Managing Director of Pan Macmillan Australia and New Zealand—one of the nation's leading trade publishers and a long-standing member of the Australian Publishers Association—I welcome the opportunity to outline our industry's vital economic and cultural footprint.

Pan Macmillan Australia is part of the Holtzbrinck Publishing Group, a privately held global enterprise. Locally, we focus intensely on the Australian and New Zealand markets. Operating from offices in Sydney, Melbourne, and Auckland, alongside a nationwide network of representatives, we employ 77 dedicated professionals. We have proudly maintained an Australian presence since 1904, celebrating our centenary in 2004, and remain deeply committed to our local heritage.

While we are part of a multi-national group, Pan Macmillan is frequently the **largest publisher by value of Australian authors** in any given year. We launch, nurture, and sustain the careers of local writers who go on to achieve immense international success. Our roster includes household names such as:

- **Fiction & Children's:** Liane Moriarty, Jane Harper, Sally Hepworth, and the current Australian Children's Laureate, Andy Griffiths.
- **Uniquely Australian Non-Fiction:** Les Carlyon's seminal works *Gallipoli* and *The Great War*; Neale Daniher's inspirational *When All Is Said & Done*; , Nagi Maehashi's record breaking cookbooks *Dinner* and *Tonight* and Eddie Jaku's globally resonant story of survival and hope, *The Happiest Man on Earth*.

Broader Cultural & Economic Impact

Our publications regularly transcend the printed page, making highly successful transitions to stage and screen. These adaptations feed directly into Australia's broader creative industries, expanding the audience for local stories well beyond our shores.

Economic Footprint: We estimate that the screen and stage ventures derived from our titles alone have generated a broad gross revenue of **AUD $700 million to $1.1 billion**.

Major Adaptations Include:

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- **Feature Films:** *The Dry* and *Force of Nature* (Jane Harper); *The Book Thief* (Markus Zusak); *Tomorrow, When the War Began* (John Marsden).
- **Streaming & Television:** *Big Little Lies* (Seasons 1 & 2), *Nine Perfect Strangers*, *The Last Anniversary*, and *Apples Never Fall* (Liane Moriarty); *The Survivors* (Jane Harper); *The Family Next Door* (Sally Hepworth); *The Messenger* (Markus Zusak).
- **Stage Productions:** *Prima Facie* and *Inter Alia* (Suzie Miller); *The Book Thief* (Markus Zusak); and the massively successful *Treehouse* series adaptations, including *Just Macbeth*, *The 13-Storey Treehouse*, and its subsequent iterations (Andy Griffiths).

Supply Chain & Retail Partnerships

Our commitment to Australian literature translates into significant, tangible support for the domestic supply chain, manufacturing, and retail sectors.

1. Domestic Manufacturing (IVE Group)

We are one of the largest print customers in the country. We proudly support Australia's major domestic printer, IVE Group—an entity we actively introduced to the book manufacturing industry, subsequently investing in the technology and staff required to scale operations.

- **Volume:** IVE Group produces s47(1)(b) for us annually.
- **Employment:** Our business directly sustains **9 dedicated staff** at IVE, with an additional **20 personnel** providing interconnected production, technology, and transport services.

2. Supply Chain Innovation (The Distribution and Logistics Company)

When the gaming sector experienced a downturn, we helped pivot and introduce a new distribution partner to the book industry: The Distribution and Logistics Company.

- **Volume:** They move approximately s47(1)(b) for us each year across Australia and New Zealand, utilising freight services via Team Global Express.
- **Employment:** As one of their top three clients, our volume secures a workforce of **83 full-time employees and 20 casual staff** at their Sydney facility.

3. Retail Contribution

Over the last three years, Pan Macmillan has put an average of s47(1)(b) through Australian retailers' tills. We support over **1000 retail outlets** across every sector, from small independent bookshops to major Discount Department Stores (DDS). In regional Australia, these department stores are frequently the *only* physical locations where families can buy books. This retail network is backed by one of the largest sales teams in Australian publishing, with representatives on the ground in every state and territory.

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Macroeconomic Pressures & Structural Challenges

These contributions are being maintained in an environment characterised by escalating structural costs and concerning societal trends. Between 2020 and 2025/26, cost increases have significantly outpaced both our own corporate growth and broader industry averages:

- **Production & Paper Costs (+25% overall since 2020):** The cost of paper—purchased via our printers from the Norske Skog Mill in Tasmania—continues to climb. Simultaneously, the manufacturing process has driven up the cost of necessary carbon offsets, adding a baseline 5–10% to production.
- **Distribution & Freight Surges (+10% baseline, plus 2026 spikes):** Domestic distribution costs rose 10% over the five years to 2025. In 2026, severe geopolitical volatility in the Middle East has triggered a sharp surge in fuel surcharges.
- **Labour Investment (+10%):** Outlays for salaries and staff costs have risen 10% as we continue to invest heavily in the welfare and retention of our people.

Beyond immediate financial pressures, two overarching crises threaten the long-term viability of the Australian literary ecosystem: **declining literacy** and the **uncompensated exploitation of intellectual property**.

The Literacy Crisis

Data from the *Australia Reads* study and the Australian Bureau of Statistics (ABS) outlines a stark, worrying picture of declining reading habits:

- **44%** of Australians struggle with low or very low literacy.
- **30%** of Australians have not read or listened to a single book in the past 12 months.
- There has been a **7% drop** in children's reading participation—falling from 79% in 2018 to 72% in 2022.
- The broader economic impact of low literacy to the Australian economy is estimated at **AUD $44 billion annually**.

Conversely, the data proves that recreational reading is a powerful preventative health and social tool. Reading fiction for just five minutes reduces stress by up to 20%. Regular readers report significantly lower rates of anxiety and depression, experience less loneliness, and are 57% more likely to possess a deeper awareness of other cultures.

Strategic Solutions & Government Action

The Australian Federal Government has a vital, historic opportunity to partner with the industry to address these dual threats. We propose action on two critical fronts:

1. A National Reading Campaign

The decline in literacy, particularly among children and adolescents, requires a co-ordinated, federally funded initiative. Twenty years ago, the government's highly successful **Books Alive** campaign proved how effectively targeted funding can stimulate national reading habits.

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We urge the Government to launch a modernised, annual **National Reading Campaign** focused on Australian authors and literary events. This scheme would reinforce the 'reading habit' for millions, delivering measurable educational and social cohesion outcomes. Furthermore, it offers a crucial, healthier alternative to screen time and the documented harms of social media exposure for vulnerable demographics like teenagers. We would warmly welcome the opportunity to co-design and implement this reality with the Federal Government.

Books are the most empowering tool we possess to help citizens realise their aspirations. This is a lived truth for me: arriving in Australia from South Africa as a nine-year-old child in the early 1980s, literacy was the gateway to my future. It is an opportunity every young Australian deserves.

2. Protection of Intellectual Property & Copyright

The Australian Government has established itself as a global leader in holding major international technology companies to account, ensuring they pay fairly for the content they appropriate and monetise. We must now apply this leadership to the generative AI and tech landscape.

Creating a robust legislative framework that ensures copyright holders and authors are fairly compensated for the use of their work is imperative. Without it, investment in Australian voices and stories will artificially dry up. The Australian Publishers Association, alongside the Australian Society of Authors, views this legislative protection as a non-negotiable safeguard for our literary ecosystem.

Getting this framework right will protect local jobs, secure creative investments, and preserve Australia's cultural voice for decades to come.

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EndemolShine Australia
We are Banijay

SUBMISSION

National Cultural Policy Consultation 2026

Submitted to:	Office for the Arts, Australian Government
Submitted by:	Endemol Shine Australia
Date:	24 May 2026
Contact:	culturalpolicy@arts.gov.au

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THE SUBMISSION IN ONE PARAGRAPH

Revive's aspiration — that Australian stories should be told, that Australian artists should thrive, that Australian culture should be expressed and valued — is one ESA endorses without reservation. This submission makes a single argument: those ambitions cannot be achieved by cultural policy alone. They require, alongside the NCP, a National Creative Industries Policy with the industrial infrastructure, the investment architecture, and the economic ambition to take Australian creative work to a world audience. Without it, Revive remains a statement of what Australia values. With it, it becomes a vehicle for what Australia can achieve.

ABOUT ENDEMOL SHINE AUSTRALIA

Endemol Shine Australia (ESA) is one of Australia's largest screen production companies, producing scripted drama, unscripted entertainment, and internationally distributed formats for Australian broadcasters, global streaming platforms, and audiences in over 100 countries. ESA has a direct and material stake in the policy settings that determine whether Australian creative work reaches a world audience — and whether the economic value of that work is retained in Australia.

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REVIVE

Revive is structured around five pillars. ESA endorses the intent behind each of them, and notes that the most commercially and globally significant of those pillars — Strong Cultural Infrastructure and Engaging the Audience — point directly toward the argument this submission makes.

REVIVE'S FIVE PILLARS — AND THE GAP

First Nations First: Recognising First Nations stories at the centre of Australia's arts and culture.
A Place for Every Story: Reflecting the breadth and diversity of Australian stories and storytellers.
Centrality of the Artist: Supporting artists as workers and celebrating them as creators.
Strong Cultural Infrastructure: Providing support across the institutions that sustain arts, culture and heritage.
Engaging the Audience: Ensuring Australian work finds and builds its audiences.

The gap: Revive articulates what Australia wants to create and who should create it. It does not yet articulate how Australian creative work reaches the world, who owns the value when it does, or how Australia attracts the investment required to compete in a global content market worth hundreds of billions of dollars. That is the gap a National Creative Industries Policy must fill.

Revive's fourth pillar, Strong Cultural Infrastructure, commits the Government to sustaining the institutions that support Australian arts and culture. ESA submits that this pillar, taken seriously, demands more than sustaining existing institutions. It demands building the industrial infrastructure — the incentive architecture, the IP framework, the investment vehicles, the co-production treaty network — that makes Australian creative work viable in a worldwide market. Revive names the destination. It does not yet provide the engine.

Revive's fifth pillar, Engaging the Audience commits the Government to ensuring Australian stories find their audiences. ESA submits that in 2026, the audience for Australian creative work is not primarily domestic. It is global. The platforms are global. The capital is global. The competition is global. Engaging that audience requires the industrial and commercial framework that this submission calls for: not as a replacement for Revive's cultural objectives, but as their necessary precondition.

THE PRIMARY ARGUMENT: CULTURAL POLICY NEEDS A COMMERCIAL VEHICLE

Every nation that has successfully taken its creative work to a world audience has done so through a deliberate combination of cultural policy and industrial policy. The two are not in competition. They are, when properly designed, the same project expressed with different instruments.

The United States

The United States has never had an explicit national cultural policy in the Australian sense. What it has had, for over a century, is an industrial policy for its creative sector, built through studio structures, distribution infrastructure, intellectual property law, trade policy, and the

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systematic deployment of diplomatic and commercial leverage to open markets for American content worldwide. The result is the most commercially dominant creative economy in human history. American stories reach every screen on earth not because they are better stories, but because the industrial infrastructure behind them is unmatched.

Australia cannot replicate that model at scale. But it cannot afford to ignore what it demonstrates: that cultural reach, at the level that matters, is an industrial achievement as much as a creative one.

The United Kingdom

The UK has operated, for decades, an explicit and well-resourced industrial policy for its creative industries running alongside its cultural policy frameworks. The BFI, the BBFC, the Audio-Visual Expenditure Credit at 25.5%, the Independent Film Tax Credit at 39.75%, a network of over 50 co-production treaties: these are industrial instruments, not cultural ones. They exist to make the UK a competitive destination for international production investment and to ensure that when British creative talent succeeds globally, Britain captures the economic value.

The result is a screen industry that contributes tens of billions of pounds annually to the UK economy and exports British stories, British talent, and British IP to every major market in the world. The cultural ambition and the industrial architecture are inseparable. One without the other produces either good intentions without reach, or production volume without cultural distinctiveness. The UK has both because it built both deliberately.

Korea — The Most Instructive Evidence

Korea is the most important comparator for Australia, because Korea's starting point most closely resembles Australia's own. In 1997, Korea had no meaningful global creative presence. The Asian financial crisis was the shock that triggered a national response: a deliberate, sustained, institutionally embedded decision to build a world-class creative industry from the ground up.

What followed over thirty years — through the Korea Creative Content Agency, through content quotas as cultural protection, through the integration of K-drama into trade and diplomatic strategy, through the Hallyu Industry Promotion Act — was the construction of an industrial infrastructure that turned Korean creative talent into a global phenomenon. The Korean Wave did not emerge from cultural policy alone. It emerged from a nation that decided, at the highest level, that its creative industries were a strategic national asset and built the framework to capitalise on them accordingly.

THE KOREAN LESSON FOR AUSTRALIA

Squid Game did not create the Korean Wave. The Korean Wave created the conditions in which Squid Game was possible. Korea's creative economy is now worth 7.5% of GDP. Netflix committed USD 2.5 billion to Korean content over a 4 year periods. Korean cultural exports are recognised in over 100 countries.

Australia has had its equivalent creative breakthroughs. MasterChef Australia holds the Guinness World Record as the most successful cooking competition in global television history. Bluey is the most-watched children's programme on Disney+ globally, and so possibly the world. These are not small achievements. They are world-class creative successes that have not been converted into world-class economic outcomes — because the industrial infrastructure to do so does not yet exist.

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THE SECONDARY ARGUMENT: THE ECONOMIC OPPORTUNITY IS ENORMOUS

ESA raises the economic dimension not to subordinate culture to commerce, but to make clear what is at stake in the decision Australia has not yet made.

THE SCALE OF THE OPPORTUNITY

The global creative industries are worth hundreds of billions of US dollars annually and growing. Screen content — television, streaming, and film — alone represents a market in excess of USD 200 billion. Music, games, publishing, and the broader creative economy add hundreds of billions more.

Australia's share of that market does not reflect its creative capacity, its production infrastructure, or its proven track record of delivering world-class content. The gap between what Australia currently captures and what it could capture — with the right industrial policy, the right incentive architecture, the right investment framework — represents one of the largest untapped economic opportunities available to this country.

We already have the talent. We already have the infrastructure. We already have the proof of concept. We need to decide to take our full share.

The decision to invest seriously in the industrial infrastructure of the creative sector would generate returns, in export revenue, in employment, in inbound production investment, in IP ownership, in the long-run appreciation of Australian creative IP. These dwarf the cost of the investment. This is not a subsidy argument. It is a return-on-investment argument. The comparators — Korea, the UK, Australia's own sporting sector — demonstrate that clearly.

THE PROOF OF CONCEPT: WHAT AUSTRALIA HAS ALREADY DONE

Australia has made a decision of this kind before.

In 1976, Australia won zero gold medals at the Montreal Olympics. The national response was not incremental. It was the Australian Institute of Sport — a comprehensive, institutionally embedded, adequately resourced decision to build a world-class sporting system from the ground up. By Sydney 2000, Australia finished fourth in the world on the gold medal table, and gain with 18 golds, 4th on the table in 2026. A nation of now, 25 million people, competing against nations three times or even ten times its size, producing results that continue to stun the world.

That outcome was not inevitable. It was chosen. It required a Federal decision, sustained institutional commitment, coordinated state-level infrastructure, and a cultural shift in what Australia believed it was capable of in sport.

THE DECISION THAT HAS NOT YET BEEN MADE

Australia made the AIS decision for sport in 1981. Korea made the equivalent decision for creative industries in 1997. The United Kingdom has been executing its equivalent decision, incrementally but consistently, for two decades.

Australia has not yet made that decision for screen, or for the creative industries more broadly. It has not made it despite having the creative talent that would justify it. It has not

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made it despite the evidence that such decisions, when made seriously, produce transformative outcomes.

The NCP consultation is the right moment to call for that decision. Not to design the full framework: that requires a more extended process and a more comprehensive engagement than a single consultation can deliver. But the decision, to signal its scope, and to ensure that the cultural policy being built here is designed with the knowledge that a parallel industrial policy can drive its survival and its success locally and internationally.

CONCLUSION

Revive's ambitions deserve to succeed. A place for every story. A story for every place. First Nations voices at the centre. Artists supported as workers. Australian culture expressed, sustained, and shared.

ESA endorses every one of those ambitions. And ESA submits that none of them will be fully achieved without the industrial infrastructure to carry them to the world.

The US built that infrastructure over a century. The UK built it over decades. Korea built it over thirty years, from scratch, with extraordinary results. Australia has the advantage of learning from all three — and of knowing, from its own experience in sport, that when it commits to this kind of national decision, it is capable of results that exceed what the size of the country would suggest possible.

The creative markets are worth hundreds of billions of dollars. Screen content alone exceeds USD 200 billion annually. Australia already has the talent. The decision to take our full share of that market — through a National Creative Industries Policy that runs alongside and supports the NCP — is the decision this consultation should precipitate.

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