**New Zealand Screen Production Rebate for International Productions**

**Application for Final Certificate**

**(incorporating the 5% Uplift Points Test)**

**1 November 2023 Criteria**

This application form should be read in conjunction with the [NZSPR Criteria for International Productions dated 1 November 2023](https://www.nzfilm.co.nz/resources/nzspr-criteria-international-productions) (the **Criteria**) and the [5% Uplift Guidance](https://www.nzfilm.co.nz/resources/5-uplift-guidance-document). Capitalised terms used in this application form have the definitions set out in Appendix 1 of the Criteria. By submitting this final application, you agree to be bound by the terms of the Criteria.

Do not use this form if:

* applying for an **Interim Rebate**
* the production is **not** applying for the 5% Uplift

If either or both of the above apply, please use the [standard Final application form for the International Rebate](https://www.nzfilm.co.nz/resources/final-application-form-nzspr-international-productions).

**Bundled productions:** a separate application form must be completed for each production within a bundle. (See clause 11 of the Criteria for more information on bundling.)

By submitting this application, the applicant agrees:

* to be bound by the terms of the Criteria;
* to comply with the [NZFC’s Code of Conduct](https://www.nzfilm.co.nz/resources/nzfc-code-conduct); and
* that the terms of the [NZFC Privacy Policy](https://www.nzfilm.co.nz/privacy-policy#:~:text=The%20NZFC%20and%20our%20third,unauthorised%20access%2C%20modification%20and%20disclosure.) will apply to all personal information submitted as part of its application.

This application form has five sections:

* Section 1 – Applicant Information
* Section 2 – Production Information
* Section 3 – Qualifying New Zealand Production Expenditure (QNZPE)
* Section 4 – 5% Uplift
* Section 5 – Statutory Declaration
* Section 6 – List of Supporting Documents

If you have any questions about this form, please contact nzspr@nzfilm.co.nz.

**Submitting your application:**

* Send via email/file sharing link to nzspr@nzfilm.co.nz; or
* Send via USB drive to:

Co-Production and Incentives Team

New Zealand Film Commission

PO Box 11546, Wellington 6142 / Level 3, 119 Ghuznee Street, Wellington 6011

Once the NZFC has received all applicable documentation and has confirmed the application is complete, a dated acknowledgement letter will be sent to confirm the start of the assessment process.

**Confidentiality**

Information that you supply to the NZFC or an independent consultant may be provided to the Rebate Panel, Inland Revenue Department (IRD), Ministry of Business Innovation and Employment (MBIE), Ministry for Culture and Heritage (MCH) and other independent consultants where reasonably necessary during the application and approval process.

Once an International Rebate has been approved and paid, the NZFC or MBIE can publish or announce the following information:

* the names of successful applicants;
* the amount of the QNZPE incurred by each applicant; and
* the Rebate amount paid to each applicant.

The NZFC will use reasonable efforts to maintain the confidentiality of the information provided by you. The NZFC, Rebate Panel, IRD, MBIE and MCH are government entities, which are subject to various disclosure requirements, for example disclosure of information under the *Official Information Act 1982*. None of them will be liable for any disclosure it believes (acting reasonably) it is required to make.

You should clearly indicate those parts of the application that you regard as commercially sensitive and confidential. In processing a request under the *Official Information Act 1982*, the NZFC or relevant New Zealand Government department or agency will use best efforts to consult with you prior to a decision on release of the documents, but you should be aware that your designation of information as commercially sensitive or confidential will not automatically result in that information being withheld by the NZFC or other government department or agency.

Statistical information provided in this application may be used by New Zealand Government ministries, departments and agencies. These ministries, departments and agencies will usually comprise: the NZFC, MCH, IRD, MBIE and Employment and Statistics New Zealand.

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| Section 1 | Applicant Information |
| Date of application:      Full name of applicant entity (Registered name):      Registration number:      Registered address:      Business/mailing address:      New Zealand GST Number:       |
| Contact person: Role of contact person:  | Business phone: Mobile phone: Email:  |

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| **1.1 Exit Survey** |
| The applicant must complete an online exit survey about their experience of making a screen production in New Zealand. This information is used for research and marketing purposes and, unless the applicant agrees otherwise, it will be treated confidentially, and only non-identifying or aggregated information will be made public.The NZFC will not begin processing a Final application until the NZFC has received a complete exit survey. Please use the link below to complete the survey: [New Zealand Screen Production Rebate – International Exit Survey](https://www.research.net/s/screen-grant) |

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| **1.2 Registration & Provisional Certificate** |
| Did the applicant register the production and receive acknowledgement from the NZFC in respect of that registration in accordance with clause 26 of the Criteria?**YES [ ]  NO [ ]** Did the production apply for a Provisional Certificate in respect of the 5% Uplift?**YES [ ]  NO [ ]** If NO to either or both of the above questions, the production is not eligible for an International Rebate and 5% Uplift. |

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| **1.3 Special Purpose Vehicle** |
| Is the applicant a special purpose vehicle established principally in relation to making the production?**YES** [ ]  **NO** [ ] If NO, please indicate which exception under clause 12.2 of the Criteria applies:[ ]  12.2(a) Series[ ]  12.2(b) Repurposing[ ]  12.2(c) Bundling**Note:** an applicant must have its own GST and payroll registration numbers and its own bank account. The applicant’s GST and payroll returns must not be grouped with any other entity for tax purposes.  |

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| **1.4 Residency Status** |
| Complete the following in relation to the Special Purpose Vehicle (SPV) |
| **Names of directors or partners** | **Citizenship of directors or partners** | **Country of permanent residence**  | **Address of directors or partners** |
|       |       |       |       |
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| **Names of shareholders or general partners** | **Citizenship of shareholders or country of incorporation (if a company)** | **Country of permanent residence**  | **% beneficial interest in the company or partnership** |
|       |       |       |       |
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| **Note:** you must supply a Company Extract (from the [New Zealand Companies Register](https://companies-register.companiesoffice.govt.nz/)) with your application. |

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| **1.5 Responsible Entity** |
| Was the applicant the entity responsible for all activities involved in making the production in New Zealand or, for the PDV Rebate, all PDV Activity on the production in New Zealand?**YES** [ ]  **NO** [ ] If NO, please provide details:  |

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| **1.6 Previous Entity** |
| Did the applicant take over responsibility for making the screen production (or undertaking PDV Activity) from another production entity? **YES** [ ]  **NO** [ ] If YES, please specify the previous entity (or entities) below. The relevant legal agreement confirming the transfer of responsibility must also be included as an **attachment.**  |
| Registered name:  Registered address:  Registration number:  **Note**: the audited expenditure statement must indicate which amounts relate to expenditure of a previous company (or companies). |

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| **1.7 Other Rebates and New Zealand Incentives** |
| Has the production received or applied for production funding from any New Zealand Government agency? Has the production received or applied for the New Zealand Rebate, Large Budget Screen Production Grant or Screen Production Incentive Fund, or any tax incentives?If the answer is YES to either, then the production is not eligible for an International Rebate.  | **[ ]  YES [ ]  NO****[ ]  YES [ ]  NO** |

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| Section 2 | **Production Information**  |
| Title of Production:      *Working Title(s) - if applicable:*  |
| SynopsisProvide a brief synopsis of the production: **Note:** If the production has not been released to the public or international marketing for its imminent release has not occurred, the NZFC may request a copy of the screen production or a dated selection of footage. |

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| **2.1 Production Overview** |
| **Format****[ ]**  **Feature film (theatrical release)**  *NB: if you are shooting more than one film simultaneously or concurrently, please see clause 8.3 of the Criteria.***[ ]**  **Television or other non-feature film (please specify below)***NB: if you are shooting more than one film simultaneously or concurrently, please see clause 9.3 of the Criteria.* **[ ]** Scripted series **[ ]** Unscripted series  **[ ]** Scripted single programme (including feature-length content not intended for theatrical release) **[ ]** Unscripted single programme (including feature-length content not intended for theatrical release) On what platform will it be first released?  |
| **Length of Production**What is the total running length of the completed production (in minutes)? If a series, what is the total number of episodes? |
| **Excluded Formats**Does the production fit into one of the following categories?* an advertising programme or commercial
* a discussion programme, current affairs programme, news, a panel programme or a programme of a like nature
* pornography
* a training programme
* an interactive digital game (other than transmedia content as per clause 17.3(b)(iv) of the Criteria)
* a production of a public event, including a sports event
* for television or other non-feature film productions only, a programme principally made for the New Zealand market

**YES [ ]  NO [ ]** If YES, the production is not eligible for the New Zealand Screen Production Rebate**.** |
| **Production Dates**Date of first day of official pre-production: Date of commencement of Principal Photography in New Zealand: Date of completion of Principal Photography in New Zealand:Date of Completion of production: *(this is not the final transaction date)***Note:*** if the production is not yet completed, use an estimated date.
* Final applications must be submitted within **six-months** after the date of Completion. Late Final applications may not be accepted.
* Completion means when a production is **first** in a state where it could reasonably be regarded as ready to be distributed, broadcast or exhibited to the general public in any form or format. Refer to the definitions in Appendix 1 of the Criteria for more details.
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| **2.2 Cast and Crew** |
| You must provide with your application a list of cast and crew that worked on the production that includes the role, permanent residency and citizenship of each person. **Note:*** “Permanent Resident” differs from “Resident” – please ensure this data is captured correctly.
* Excel is the preferred format for this list.
* contact details for cast and crew are not required.
* the collection and provision of any personal information must comply with [NZFC's Privacy Policy](https://www.nzfilm.co.nz/privacy-policy#:~:text=The%20NZFC%20and%20our%20third,unauthorised%20access%2C%20modification%20and%20disclosure.).

For all personnel travelling to New Zealand to work on the production: a travel schedule showing arrival and departure dates and the nationality of each passenger is also required. |
| Has the applicant, to the best of its knowledge, complied with all applicable New Zealand immigration laws relating to the employment of non-resident cast and crew who worked on the screen production?**YES [ ]  NO [ ]** If NO, please provide details:  |

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| **2.3 Credit and Promotional Materials** |
| Please note that the completed production must include an on-screen end credit and NZFC logo. The current NZFC logo can be obtained by contacting nzspr@nzfilm.co.nz. Please note, unless otherwise agreed with the NZFC, the logo should only be used in conjunction with the end credit text:***The filmmakers acknowledge the assistance of the New Zealand Government’s Screen Production Rebate*****Note:** proof of compliance with the credit and logo requirements is required – this can be met by attaching a screenshot that shows the credit and logo, or by supplying a copy of the production. The applicant must also provide promotional materials to the NZFC in accordance with the [Promotional Materials Schedule](https://www.nzfilm.co.nz/resources/promotional-materials-schedule) on the NZFC website. The NZFC may wish to use promotional material from the production on the [NZFC website](https://www.nzfilm.co.nz/international/made-new-zealand). Please ensure any restrictions on the use of supplied materials, contact details for permissions, image credits, embargoes and other considerations are included with your application. In exceptional circumstances, the NZFC may waive one, or both, of these requirements. If you wish to apply for a waiver of the credit and/or promotional materials requirements, please include a letter with your application outlining why you are unable to provide a credit and/or promotional materials. **Note:** * applicants claiming points in section F2 of the 5% Uplift test should deliver materials in accordance with the agreed film marketing partnership.
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| **Section 3** | **Qualifying New Zealand Production Expenditure (QNZPE)** |
| **GST:** The International Rebate is calculated in relation to amounts that are net of New Zealand Goods and Services Tax (GST). Therefore, all figures in this application should be quoted net of GST. **Non-accrual basis of expenditure:** to be QNZPE, an expenditure item must have actually been incurred and paid by the applicant on the making of the production prior to the date the final application is submitted.  |

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| **3.1 Expenditure Threshold** |
| Check all that apply:**[ ]**  5% Uplift - $30 million or more **[ ]**  Bundled production – please provide details:  *QNZPE for this production:* *Format (feature/series/telefeature/pilot):* *Title(s) of other production(s) in the bundle:* |

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| **3.2 QNZPE Overview** |
| Total Expenditure | NZ$  |
| Total QNZPE | NZ$  |
| Total Above The Line Costs claimed as QNZPE | NZ$  |
| Date of first QNZPE transaction*(this is the not the date of any prior development expenditure incurred by another entity)* |  |
| Date of final QNZPE transaction |  |

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| **3.3 General Ledger** |
| The general ledger(s)\* for the production must be provided and must, at a minimum, include the following details in relation to each cost:* date
* description
* amount of expenditure
* details of each service provider/vendor
* whether such expenditure is QNZPE or non-QNZPE
* for an Official Co-production, whether such expenditure is an exclusion from TPE
* when the good or service or land was used in the making of the production
* whether the expenditure is payroll, petty cash, accounts payable or a journal
* date when, or period of time over which, the item was used on the production

The general ledger provided with the application must match the one supplied to the auditor.\* Please provide a separate ledger, or ledgers, for expenditure incurred and paid in a foreign currency and/or expenditure incurred by an entity other than the SPV. **Note:** * Foreign currency expenditure must be converted into New Zealand dollars on a monthly basis at the [mid-month exchange rate published on the IRD website](https://www.ird.govt.nz/managing-my-tax/overseas-currency-conversion-to-nz-dollars) for the month in which the payment was made.
* Expenditure incurred by an entity other than the SPV must be transacted through the SPV if included in the QNZPE claim. Reimbursement via inter-company invoice or journal are acceptable.

A final production cost report and a balance sheet (a trial balance is acceptable if a final is not available) must also be included with your Final application. These documents must match the GL and audited expenditure statement. |

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| **3.4 Audited Expenditure Statement** |
| All costs claimed as QNZPE must be presented in an audited expenditure statement. [An Expenditure Statement template is available here](https://www.nzfilm.co.nz/resources/nzspr-template-expenditure-statement-international-productions) or contact nzspr@nzfilm.co.nz to request a copy. The expenditure statement must include details of:* total expenditure
* QNZPE
* Non-QNZPE
* foreign currency expenditure

All expenditure must be identified in New Zealand dollars. |
| If exclusions are made to the claimed QNZPE during the Final assessment, your auditor needs to be made aware of this. If you would like the NZFC to send a copy of the Final Certificate on your behalf, please check the box below.[ ]  **I authorise the NZFC to send a copy of any approved Final Certificate issued as a result of this application directly to the production’s auditor as specified below.** |
| Name of auditor:       |
| Company name:       |
| Email:       |
| Phone:       |

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| **3.5 Above The Line Costs** |
| To ensure you meet the requirements of clause 17.4(o) of the Criteria, you must provide a breakdown of your calculation of Above The Line (ATL) Costs. This breakdown must include a short description of each of the goods and services included in your calculation of Above The Line Costs.**Note:*** Above The Line Costs are capped at 20% of QNZPE.
* Above The Line Costs are defined in Appendix 1 of the Criteria.
* Contracts for Above The Line cast and crew are required with all Final applications.

Sample calculation of claimable Above The Line Costs:

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| Claimed QNZPE | 50,000,000 |  |
| Claimed ATL Costs | 8,000,000 |  |
|   |  |  |
| Adjusted Amount | 42,000,000 | *claimed QNZPE-claimed ATL Costs* |
| Claimable ATL Costs | 10,500,000 | *adjusted amount/80\*20* |

In the above example, claimed ATL Costs do not exceed the cap. |

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| **3.6 Goods sourced from overseas** |
| Please identify all goods sourced from overseas that you intend to claim as QNZPE **and** explain why the goods meet the requirements of clause 17.2(b) of the Criteria.**Note:** you must attach to this application, evidence supporting your explanation for each good/category of goods. |
| **Name or category of good(s)** | **Explanation** | **Name of New Zealand Supplier(s)** |
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| **3.7 Non-Arm’s Length Expenditure** |
| [Please download and complete the non-arm's length expenditure template](https://www.nzfilm.co.nz/resources/nzspg-template-non-arms-length-expenditure) or contact nzspr@nzfilm.co.nz to request a copy.Non-arm’s length expenditure means all costs paid to entities or persons who provided goods, services or land in making the production and who are associated with the applicant, or any of its associated entities. You must also include with your application, supporting documentation such as contracts, contract variations, timesheets, invoices and/or other agreements for all non-arm’s length expenditure claimed as QNZPE.Refer to clause 21 of the criteria for more information about the Rebate Panel’s assessment of non-arm’s length expenditure. |

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| **3.8 Assets** |
| Did the applicant acquire any assets for use on the production in New Zealand? **YES** [ ]  **NO** [ ]  If YES, please either:1. attach a schedule of depreciation in relation to those assets; or
2. if no assets have been retained at the date of this application, please attach a schedule providing information on the disposal of those assets, including date of sale and sale price.
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| **3.9 Major Supplier** |
| Does 75% or more of the QNZPE claimed in this application relate to goods or services provided by the same supplier/vendor? **YES** [ ]  **NO** [ ]  If YES, please attach a copy of the supplier/vendor agreement and copies of all invoices issued to the applicant by that supplier/vendor.The NZFC may contact the major supplier/vendor to obtain a signed confirmation letter regarding goods and/or services provided in New Zealand by that supplier/vendor. |

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| **3.10 Historical Costs** |
| Has the production incurred any costs that were paid more than ten years prior to the start of Principal Photography or PDV Activity (historical costs)? If YES, then please specify what costs: **Note**: Historical costs cannot be claimed as QNZPE unless the Rebate Panel approves such costs. Refer to clause 6 of the Criteria for other excluded historical costs. | **[ ]  YES [ ]  NO** |

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| **3.11 Inland Revenue Requirements** |
| A copy of your application will be provided to the Inland Revenue Department (IRD) to check the quantum of the claimed QNZPE against their records. Refer to the checklist in Section 6 of this form for required documents.The IRD may contact you directly if they require any additional information. |

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| Section 4 | 5% Uplift |
| Before completing this section, you should read the [NZSPR Criteria for International Productions dated 1 November 2023](https://www.nzfilm.co.nz/resources/nzspr-criteria-international-productions) and the [5% Uplift Guidance](https://www.nzfilm.co.nz/resources/5-uplift-guidance-document). To qualify for the 5% Uplift, an applicant must obtain at least 40 points out of a potential 85 points.**Note:*** the three points in section A1 are the **only** mandatory points in the test – **all** other points are optional.
* where referenced, a “Qualifying Person” is defined as a New Zealand Citizen or New Zealand Permanent Resident.
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| **5% Uplift Points Test** | **Points Available** | **Points Claimed** |
| **A - Sustainability** |
| A1 - Sustainability Action Plan and Sustainability Report (mandatory) | 3 | 3 |
| A2 - Sustainability officer | 2 |  |
| A3 - Carbon emissions review | 2 |  |
| **Total Section A (minimum of 3 points required in A1)** | **7** |  |
| **B - New Zealand production activity** |
| B1 - New Zealand studio lease | 2 |  |
| B2 - Previous QNZPE | 2 |  |
| B3 - Associated content | 1 |  |
| B4 - Shooting in New Zealand | 2 (0-2) |  |
| B5 - Shooting in Regions | 2 |  |
| B6 - Picture post-production in New Zealand | 3 (0 - 3) |  |
| B7 - Sound post-production in New Zealand | 3 (0 - 3) |  |
| B8 - Digital or visual effects in New Zealand | 3 (0 - 3) |  |
| B9 - Concept design and physical effects in New Zealand | 3 (0 - 3) |  |
| **Total Section B** | **21** |  |
| **C - New Zealand personnel** |
| C1 - Cast | 2 |  |
| C2 - Crew | 1 |  |
| C3 - Māori | 1 |  |
| C4 - Above The Line crew | 9 (0 - 9) |  |
| C5 - Below The Line crew  | 4 (0 - 4) |  |
| C6 - More Below The Line crew | 4 (0 - 4) |  |
| C7 - Lead cast | 3 |  |
| C8 - Supporting cast | 3 (0 - 3) |  |
| C9 - Casting | 2 (0 - 2) |  |
| C10 - Lead cast or Above The Line crew is Māori | 2 (0 - 2) |  |
| **Total Section C** | **31** |  |
| **D - Skills and talent development** |
| D1 - Masterclass | 2 |  |
| D2 - Educational seminars | 1 |  |
| D3 - Attachment positions | 2 |  |
| D4 - Internships | 1 |  |
| **Total Section D** | **6** |  |
| **5% Uplift Points Test (continued)** | **Points Available** | **Points Claimed** |
| **E - Innovation and infrastructure** |
| E1 - Transfer of knowledge of production method or technology | 2 |  |
| E2 - Commercial agreement for creation or development of new production method or technology | 3 (0 - 3) |  |
| E3 - Investment in New Zealand infrastructure | 3 (0 - 3) |  |
| **Total Section E** | **8** |  |
| **F - Marketing, promoting and showcasing New Zealand** |
| F1 - Premiere | 3 (0 - 3) |  |
| F2 - Film marketing partnership | 3 |  |
| F3 - Tourism marketing partnership | 3 |  |
| F4 - Bespoke partnership with Tourism New Zealand | 3 |  |
| **Total Section F** | **12** |  |
| **TOTAL (minimum of 40 points required, including 3 in A1)** | **85** |  |

**Please provide further detail on the points claimed in the 5% Uplift Points Test and provide attachments where requested. Only complete the sections for which you have claimed points.**

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| **A - Sustainability** |
| **A1 - Sustainability Action Plan and Sustainability Report** Please **attach** the Sustainability Report for the production. The report should include:* a completed carbon emissions report with your production’s Carbon Footprint;
* a review of the Sustainability Action Plan, including a written summary or narrative evaluating the effectiveness of the measures taken to mitigate the identified impacts on the environment and any other impacts on the environment that arose during production.
 |
| **A2 - Sustainability officer**Please **attach**:* A report from the production’s sustainability trainee/intern that specifies:
* how many hours of training they undertook with the experienced sustainability officer; and
* the key learnings of the trainee/intern; and
* that they are New Zealand based;
* the behind-the-scenes video (mov or .mp4 is preferred);
* if delivered as a webinar, a recording of your seminar, or if delivered in person, a report of the seminar; and
* your sustainability officer’s summary of the production’s learnings in your final Sustainability Report.

Provide the name of the production’s sustainability officer, the date they were appointed and a short summary of their previous experience:       |
| **A3 - Carbon emissions review**Please **attach** the verification report, assurance report, or review documentation that you received from the service provider. |

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| **B - New Zealand Production Activity**  |
| **B1 - New Zealand studio lease**Please **attach** written confirmation from the landlord of the studio facility that you (or your Related Entity) and the landlord have executed a lease for that studio facility for a duration of not less than three years.Provide the name of the studio facility:       |
| **B2 - Previous QNZPE**Provide the names of previous productions made in New Zealand, corresponding approved QNZPE and the date of Final Certificate for the relevant rebate for each of those previous productions in reverse chronological order (with the oldest first):

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| **Name of production and (if applicable) name of New Zealand Creative Producer** | **Total Approved QNZPE (NZ$)** | **Date of Final Certificate\*** |
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\*This is the date of the Grant Approval Letter/Final Certificate the applicant (or any Related Entity of the applicant) or the New Zealand Creative Producer received from the NZFC in respect of that production. The oldest date must be no later than 5 years prior to the date of this application. |
| **B3 - Associated content**1. Is the production a sequel to, prequel to, or a spin-off from, a previous production? If so, please specify:

      1. Why do you consider it to be a sequel or prequel to, or a spin-off from, a previous production (as applicable)? In answering this question, provide a synopsis of the previous production:

      1. Provide the details of that previous production, such as the title, production dates and production base in New Zealand:

       |
| **B4 - Shooting in New Zealand**Please **attach** the production schedule showing the number of days that Principal Photography occurred and how many of those occurred in New Zealand.1. What was the total number of shooting days?
2. How many days were carried out in New Zealand (whether in a New Zealand studio or on location)?

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| **B5 - Shooting in Regions**Please list region(s) below and the number of Principal Photography days that were carried out in the region(s):

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| **Region/Location** | **No. of Principal Photography days** |
|       |        |
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| **B6 - Picture post-production in New Zealand**1. What was the total amount of expenditure on picture post-production?
2. Please list all GL codes used to calculate this total:

               1. Of this expenditure, how much is expected to be QNZPE?
 |
| **B7 - Sound post-production in New Zealand**1. What was the total amount of expenditure on music (including composing, scoring, performing, recording but excluding source music), voice recording and/or sound post-production?
2. Please list all GL codes used to calculate this total:

               1. Of this expenditure, how much is expected to be QNZPE?
 |
| **B8 - Digital or visual effects production in New Zealand**1. What was the total amount of expenditure on digital or visual effects production?
2. Please list all GL codes used to calculate this total:

               1. Of this expenditure, how much is expected to be QNZPE?
 |
| **B9 - Concept design and physical effects in New Zealand**Concept design and physical effects includes creature design, special effects, mechanical effects, specialist prosthetics, models, special props and costumes supplied by specialist companies rather than by the crew working on the production - e.g., art department crew. It does not include fees for the production designer or for personnel in art department, wardrobe or hair and make-up.1. What was the total amount of expenditure on concept design and physical effects?
2. Of this expenditure, how much is expected to be QNZPE?
3. Please list the company/companies supplying concept design and physical effects and the associated GL code(s):

|  |  |  |
| --- | --- | --- |
| **Company** | **Description of Services** | **GL Code(s)** |
|       |       |        |
|       |       |        |
|       |       |        |
|       |       |        |
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|       |       |        |

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| **C - New Zealand Personnel** |
| **C1 - Cast**Refer to items 9, 10, 29 & 30 on the List of Supporting Documents in Section 6 of this form. Additional individual contracts may be requested during the assessment process.1. What is the total number of cast (including lead and supporting cast referred to below)?
2. How many cast are Qualifying Persons?
 |
| **C2 - Crew**Refer to items 9, 10, 29 & 30 on the List of Supporting Documents in Section 6 of this form. Additional individual contracts may be requested during the assessment process.1. What is the total number of crew working on the production worldwide?
2. How many crew are Qualifying Persons?
 |
| **C3 - Māori**Please **attach** a list of the names of those crew members that are Qualifying Persons and have stated that they are Māori. Please also provide the information the crew member provided when stating they are Māori.What is the number of crew members that are Qualifying Persons and who have stated that they are Māori?      Individual contracts may be requested during the assessment process.**Note:** please ensure all crew are informed of the purpose of collecting this data and that their participation is optional. The collection and provision of any personal information must comply with [NZFC's Privacy Policy](https://www.nzfilm.co.nz/privacy-policy#:~:text=The%20NZFC%20and%20our%20third,unauthorised%20access%2C%20modification%20and%20disclosure.). |
| **C4 - Above The Line crew**Refer to items 9, 10, 29 & 30 on the List of Supporting Documents in Section 6 of this form.Please provide the names of Qualifying Persons contracted for Above The Line roles in the table below. Where there are multiple people carrying out the same role, refer to the guidance on who to include.**Note:** claimed personnel must receive a credit for their role on the production.

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name** | **Citizenship** | **Country of permanent residence**  |
| Director(s) |        |        |        |
| Producer(s) |        |        |        |
| Executive Producer(s) |        |        |        |
| Associate Producer(s) |        |        |        |
| Co-Producer(s) |        |        |        |
| Writer(s) |        |        |        |
| Showrunner(s) |        |        |        |

 |
| **C5 - Below The Line crew**Refer to items 9, 10, 29 & 30 on the List of Supporting Documents in Section 6 of this form. Individual contracts may be requested during the assessment process.Please provide the names of Qualifying Persons for Below The Line roles in the table below. **Note:** claimed personnel must receive a credit for their role on the production.

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name** | **Citizenship** | **Country of permanent residence**  |
| Director of Photography |        |        |        |
| 1st Assistant Director |        |        |        |
| Editor |        |        |        |
| VFX Supervisor |        |        |        |
| Costume Designer |        |        |        |
| Composer |        |        |        |
| Production Designer |        |        |        |

 |
| **C6 - More Below The Line crew**Refer to items 9, 10, 29 & 30 on the List of Supporting Documents in Section 6 of this form. Individual contracts may be requested during the assessment process.Please provide the names of those Qualifying Persons that have been contracted in the table below. **Note:** claimed personnel must receive a credit for their role on the production.

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name** | **Citizenship** | **Country of permanent residence**  |
| 2nd Assistant Director |        |        |        |
| Supervising Art Director |        |        |        |
| Financial Controller |        |        |        |
| Production Accountant |        |        |        |
| Sound Designer |        |        |        |
| Sound Editor |        |        |        |
| Sound Mixer |        |        |        |
| Special Effects Supervisor |        |        |        |
| Line Producer or Unit Production Manager |        |        |        |
| Art Director |        |        |        |
| Hair |        |        |        |
| Makeup |        |        |        |
| Stunt Coordinator |        |        |        |
| Choreographer |        |        |        |

 |
| **C7 - Lead cast**Refer to items 9, 10, 29 & 30 on the List of Supporting Documents in Section 6 of this form.Please provide the names of Qualifying Persons contracted for a lead cast role in the table below. **Note:** claimed personnel must receive a credit for their role on the production.

|  |  |  |  |
| --- | --- | --- | --- |
| **Role/Character Name** | **Actor’s Name** | **Citizenship** | **Country of Permanent Residence**  |
| Lead role or character |        |        |        |
| Lead role or character |        |        |        |
| Lead role or character |        |        |        |

For each role listed, state why they are considered a lead character:                |
| **C8 - Supporting cast**Refer to items 9, 10, 29 & 30 on the List of Supporting Documents in Section 6 of this form. Individual contracts may be requested during the assessment process.Please provide the names of Qualifying Persons contracted for a supporting cast role in the table below.**Note:** claimed personnel must receive a credit for their role on the production.

|  |  |  |  |
| --- | --- | --- | --- |
| **Role/Character Name** | **Actor’s Name** | **Citizenship** | **Country of Permanent Residence**  |
| Supporting role or character |        |        |        |
| Supporting role or character |        |        |        |
| Supporting role or character |        |        |        |

For each role listed, state why they are considered a supporting character:                |
| **C9 - Casting**Refer to items 9, 10, 29 & 30 on the List of Supporting Documents in Section 6 of this form. Individual contracts may be requested during the assessment process.Please **attach** written confirmation from the casting director or casting associate (as applicable) that they did have the opportunity to present New Zealand actors for lead and supporting cast roles at a time when casting decisions for those roles were still being made.Provide the name of the Qualifying Person that has been engaged as a New Zealand casting director or casting associate in the table below. **Note:** claimed personnel must receive a credit for their role on the production.

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name** | **Citizenship** | **Country of permanent residence**  |
| Casting director  |        |        |        |
| Casting associate |        |        |        |

 |
| **C10 - Lead cast or Above The Line crew is Māori**Please set out which lead cast and/or above-the-line role crew member (from C4 or C7) is Māori, and include information that person provided when stating they are Māori:     Individual contracts may be requested during the assessment process.**Note:*** claimed personnel must receive a credit for their role on the production.
* please ensure cast and crew are informed of the purpose of collecting this data and that their participation is optional. The collection and provision of any personal information must comply with [NZFC's Privacy Policy](https://www.nzfilm.co.nz/privacy-policy#:~:text=The%20NZFC%20and%20our%20third,unauthorised%20access%2C%20modification%20and%20disclosure.).
 |

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| **D - Skills and talent development** |
| **D1 - Masterclass**Please **attach** a report about the masterclass held and the survey responses received from attendees. At a minimum, the report should include:* the date, duration and location of the masterclass;
* an overview of its content;
* who presented the masterclass;
* which professions or worker in the New Zealand screen sector it was tailored to;
* any additional feedback and/or learnings not included in the survey responses.
 |
| **D2 - Educational seminars** Please **attach** a report about the educational seminar(s) held. At a minimum, the report should include:* the date, duration and location of the seminar(s);
* an overview of their content;
* who presented the seminar(s);
* which level of education they were tailored to (primary, secondary, tertiary);
* the names of the institution(s) presented to;
* any feedback received from attendees and/or institutions.
 |
| **D3 - Attachment positions**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Attachee Name** | **Citizenship** | **Country of Permanent Residence**  | **Attachment Role** | **Duration of Attachment** |
|        |        |        |        |        |
|        |        |        |        |        |
|        |        |        |        |        |
|        |        |        |        |        |

Please **attach** a summary from the production company of the duration of each attachment and a report from each attachee outlining their key benefits and learnings. |
| **D4 - Internships**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Intern Name** | **Citizenship** | **Country of Permanent Residence**  | **Role/Department** | **Duration of Internship** |
|        |        |        |        |        |
|        |        |        |        |        |
|        |        |        |        |        |
|        |        |        |        |        |
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|        |        |        |        |        |
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|        |        |        |        |        |

Please **attach:*** A report from the production company that includes:
* the number of hours of work and the number of rotations undertaken for each intern;
* the number of hours spent in Pre-Production or post-production for each intern;
* a link to, or copy of, the production’s health and safety policy that includes the availability of an external support entity for an intern;
* confirmation that the production paid each intern the living wage or higher; and
* a brief summary of the key learnings that the production considers the interns have gained.
* A report from each intern that includes:
* the number of hours of work and the number of rotations undertaken;
* the number of hours spent in Pre-Production or post-production; and
* a summary of the key benefits and learnings that the intern considers they gained from the attachment.
 |

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| **E - Innovation and infrastructure** |
| **E1 - Transfer of knowledge of production method or technology** Please **attach:*** a written summary of the training provided by the production to the applicable crew, including commentary from the applicable crew on what they gained from the training
* a report about the workshop held (include the date, duration, location and presenters); and
* the survey responses received from workshop attendees

Provide a description of the production method or technology and explain how it differs from what is generally used or experienced by New Zealanders working on (international or domestic) productions in New Zealand:      How was the production method or technology used in the production?      |
| **E2 - Commercial agreement for creation or development of new technology or production method**Please **attach** a written report or confirmation from the New Zealand entity as to the intellectual property or benefit gained under the commercial agreement and the New Zealand entity’s ability to exploit that intellectual property or benefit. The report should also include:* a description of the new production method or technology and explain why it’s considered ‘new’
* evidence of the value of the commercial agreement, or written confirmation of the portion of fees or value attributed to the creation or development work.
 |
| **E3 - Investment in New Zealand infrastructure**Please **attach** written confirmation from the New Zealand vendor that it has entered into an agreement to take ownership of the applicable infrastructure or ancillary facility for a period of not less than 3 years. This attachment should include:* a description of applicable infrastructure and/or ancillary facilities in which the investment was made; and
* evidence of the amount of investment.
 |

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| **F - Marketing, promoting and showcasing New Zealand** |
| **F1 - Premiere**When and where did the premiere take place?      Which Above The Line cast or crew from the production attended?      Which press organisations attended?       |
| **F2 - Film marketing partnership** Please **attach** a written report on the production’s marketing partnership. The report should include:* a summary of the activities delivered against the agreed proposal, including dates;
* the results of those activities;
* any additional activities delivered;
* any feedback and/or learnings gained.
 |
| **F3 - Tourism marketing partnership**Please **attach** written confirmation from Tourism New Zealand that includes:* a summary of the activities delivered against the agreed proposal, including dates;
* the results of those activities;
* any additional activities delivered;
* any feedback and/or learnings gained.
 |
| **F4 - Bespoke partnership with Tourism New Zealand**Please **attach** written confirmation from Tourism New Zealand that includes:* a summary of the activities delivered against the agreed proposal, including dates;
* the results of those activities;
* any additional activities delivered;
* any feedback and/or learnings gained.
 |

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| Section 5 | Statutory Declaration |

**The applicant must complete the Statutory Declaration below to accompany this application certifying that the content of the application is true and correct. This should be completed by an officer of the applicant or a person authorised by the applicant in writing to do so.**

I, (1)  , of (2)

do solemnly and sincerely declare on behalf of (3)

that the information contained in this application for the New Zealand Screen Production Rebate, and the documents attached to it, are correct and true in every particular and I make this solemn declaration conscientiously believing the same to be true and by virtue of the New Zealand Oaths and Declarations Act 1957.

(4)

Declared at

This  day of

Before me,
 (5)

(6)

1. Here insert name of person making the declaration. This person should be authorised to make the declaration on behalf of the applicant company.
2. Here insert address and office held in the applicant of person making the declaration.
3. Name of applicant.
4. Signature of person making the declaration.
5. Signature of person before whom the declaration is made.
6. Here insert name and title of person before whom the declaration is made. This must be a ‘prescribed person’ - Barrister and Solicitor of the High Court of New Zealand, Justice of the Peace, Notary Public, Member of Parliament, Registrar of the District Court. If the declaration is made outside New Zealand please refer to [section 11 of the *Oaths and Declarations Act 1957*](https://www.legislation.govt.nz/act/public/1957/0088/latest/DLM316109.html).

|  |  |
| --- | --- |
| **Section 6** | **List of Supporting Documents** |

**PREPARING YOUR APPLICATION:**

* Attachments should be named and numbered, as per this checklist.
* Please send attachments as separate files (do not combine into one PDF).
* All documents must be provided in **English.**
* Once the NZFC has received **all** applicable documentation listed above and has checked the application, you will be sent a dated acknowledgement letter, which indicates the start of the application process.

\* All these documents should be as at the same date

|  |  |  |  |
| --- | --- | --- | --- |
|  |  | **Attached** | **N/A** |
| **Section 1 - Applicant Information** |
|  | Completed application form including the statutory declaration. | [ ]  | [ ]  |
|  | Completed online exit survey ([NZSPR – International Exit Survey](https://www.research.net/r/screen-grant?sm=YWES5u73JpgySOteFXhzSo4FcAZFG%2bHHnHiRbtCY8AY%3d)). *Check ‘Attached’ once the online survey has been submitted.* | [ ]  | [ ]  |
|  | A Company Extract (from the [New Zealand Companies Register](https://companies-register.companiesoffice.govt.nz/)) dated within a week of the date of this application, or verification of a foreign corporation with a fixed establishment in New Zealand for tax purposes. | [ ]  | [ ]  |
|  | Fully executed Production Services Agreement or other document verifying the level of responsibility of the applicant for the making of the production in New Zealand, or for carrying out the PDV Activity in New Zealand. | [ ]  | [ ]  |
|  | Any agreement relating to the transfer of the production from a previous production entity or entities. | [ ]  | [ ]  |
| **Section 2 - Production Information** |
|  | Production schedule (including post-production where applicable). *Daily Progress Reports (DPRs) and call sheets to be provided upon request.* | [ ]  | [ ]  |
|  | Final one-line shooting schedule. *Not required for PDV applications.* | [ ]  | [ ]  |
|  | Proof of distribution or exhibition arrangements*. This can be in the form of a deal memo or letter of confirmation from the distributor or broadcaster on official letterhead.* | [ ]  | [ ]  |
|  | Final list of production credits.  | [ ]  | [ ]  |
|  | Final list of cast and crew showing role, **permanent** residency and citizenship of each person. *Excel preferred. Not required for PDV applications.* | [ ]  | [ ]  |
|  | Cast and crew travel schedule showing all arrival and departure dates from New Zealand and nationality of person travelling ([template available here](https://www.nzfilm.co.nz/resources/template-travel-schedule) or contact nzspr@nzfilm.co.nz to request a copy). | [ ]  | [ ]  |
|  | Proof of the required on-screen end credit and logo, as per clause 35. *Screenshot preferred.*  | [ ]  | [ ]  |
| **Promotional material**(Please refer to the [Promotional Materials Schedule](https://www.nzfilm.co.nz/resources/promotional-materials-schedule) on the NZFC website for full details).  |
| 1.
 | Publicity Stills: At least 12 high resolution publicity stills with captions and any required image credits (JPEG, TIFF or PNG preferred). *Half to include behind-the-scenes production activity emphasising New Zealand’s role in the production, and the other half featuring scenes from the completed film.* | [ ]  | [ ]  |
|  | One sheet artwork/posters including electronic copy (JPEG, TIFF or PNG preferred). | [ ]  | [ ]  |
|  | Trailer(s). | [ ]  | [ ]  |
|  | Press kit/production notes | [ ]  | [ ]  |
|  | Electronic Press Kit (EPK). *Note: Items not cleared for New Zealand promotional use may be removed.* | [ ]  | [ ]  |
|  | Schedule of any restrictions on the use of supplied promotional materials, including contact details for permissions, image credits, embargoes and other considerations. | [ ]  | [ ]  |
| **Section 3 - QNZPE** |
|  | Expenditure statement in Excel ([template available here](https://www.nzfilm.co.nz/resources/nzspr-template-expenditure-statement-international-productions) or contact nzspr@nzfilm.co.nz to request a copy).\* | [ ]  | [ ]  |
|  | General ledger of **audited** production expenditure in Excel (this must match the GL provided to the production’s auditor).\* *Provide separate ledgers for expenditure incurred in a foreign currency, or currencies, and expenditure incurred by an entity, or entities, other than the SPV.* | [ ]  | [ ]  |
|  | Where not provided under item 20, schedule of foreign currency expenditure claimed as QNZPE converted at appropriate exchange rate. | [ ]  | [ ]  |
|  | Balance Sheet (a trial balance sheet is acceptable if the final is not available).\* | [ ]  | [ ]  |
|  | Final production cost report. | [ ]  | [ ]  |
|  | Final production budget. *A post-production and/or VFX budget is acceptable for PDV applications.* | [ ]  | [ ]  |
|  | Schedule of all payments made to non-resident cast and crew showing portion claimed as QNZPE. | [ ]  | [ ]  |
|  | Schedule of any non-recoverable advances paid to any cast or crew member (where all or part of that person’s fee is claimed as QNZPE). | [ ]  | [ ]  |
|  | Auditor’s report (from an NZFC approved auditor) including the audited expenditure statement signed or stamped by the auditor. | [ ]  | [ ]  |
|  | Breakdown of calculation of Above The Line Costs. | [ ]  | [ ]  |
|  | Fully executed Above-The-Line cast contracts. *Generally understood in the industry as ‘star(s)’/ core cast members within an ensemble cast.* | [ ]  | [ ]  |
|  | Fully executed Above-The-Line crew contracts. *Generally understood in the industry as Executive Producer(s), Producer(s), Director(s) and Writer(s).* | [ ]  | [ ]  |
|  | Supporting evidence for inclusion of overseas-sourced goods claimed as QNZPE. | [ ]  | [ ]  |
|  | Schedule of non-arm’s length expenditure with relevant supporting documentation ([template available here](https://www.nzfilm.co.nz/resources/nzspg-template-non-arms-length-expenditure) or contact nzspr@nzfilm.co.nz to request a copy). | [ ]  | [ ]  |
|  | Asset register. | [ ]  | [ ]  |
|  | Major supplier/vendor agreement and copies of all invoices issued to the applicant by that supplier/vendor. *Only required where 75% or more QNZPE relates to goods or services provided by the same supplier/vendor.* | [ ]  | [ ]  |
| **IRD requirements** |
|  | Schedule of payments to non-resident contractors where non-resident contractors withholding tax has not been deducted because a certificate of exemption was issued, or they qualified under the 92-day *de minimus* rule. | [ ]  | [ ]  |
|  | Schedule of GST exempt or zero-rated expenditure which has been claimed as QNZPE (e.g., air travel into New Zealand). | [ ]  | [ ]  |
|  | Schedule of GST expenditure which is NOT claimed as QNZPE. | [ ]  | [ ]  |
|  | Schedule of payments for non-resident equipment rentals which have NRCWT deducted from the payment, or a special tax rate certificate (‘STRC’) is held, where a specified rate has been deducted. | [ ]  | [ ]  |

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| **Section 4 – 5% Uplift** (Refer to the [Guidance Document](https://www.nzfilm.co.nz/resources/5-uplift-guidance-document) for further detail on specific sections) |
| A1 | Sustainability Report.  | [ ]  | [ ]  |
| A2 | A report from the production’s Sustainability trainee/Intern. | [ ]  | [ ]  |
| A2 | Behind-the-scenes video on the production’s sustainability measures. | [ ]  | [ ]  |
| A2 | Recording of sustainability webinar or a written report on the sustainability seminar. | [ ]  | [ ]  |
| A3 | Carbon Emissions Review Report supplied by carbon auditor/service provider. | [ ]  | [ ]  |
| B1 | Written confirmation of New Zealand studio lease. | [ ]  | [ ]  |
| B4/B5 | Where not provided under item #6 above: a production schedule/calendar showing the number of days Principal Photography occurred and how many of those days occurred in New Zealand. | [ ]  | [ ]  |
| C3 | Information provided by Māori crew. (The collection and provision of any personal information must comply with the [NZFC's Privacy Policy](https://www.nzfilm.co.nz/privacy-policy#:~:text=The%20NZFC%20and%20our%20third,unauthorised%20access%2C%20modification%20and%20disclosure.).) | [ ]  | [ ]  |
| C9 | Written confirmation from the Casting Director or Casting Associate (as applicable) in respect of New Zealand casting opportunities. | [ ]  | [ ]  |
| C10 | Where not provided for C3, information provided by Māori ATL cast/crew. (The collection and provision of any personal information must comply with [NZFC's Privacy Policy](https://www.nzfilm.co.nz/privacy-policy#:~:text=The%20NZFC%20and%20our%20third,unauthorised%20access%2C%20modification%20and%20disclosure.).) | [ ]  | [ ]  |
| D1 | Report on the masterclass(es) held and survey responses from attendees. | [ ]  | [ ]  |
| D2 | Report on the educational seminar(s) held and any feedback received from the attendees/educational institution(s). | [ ]  | [ ]  |
| D3 | A report on the attachments from the production **and** reports from each individual attachee outlining their key benefits and learnings from the attachment. | [ ]  | [ ]  |
| D4 | A report on the internships from the production **and** reports from each individual intern. | [ ]  | [ ]  |
| E1 | A written summary from the production of the training provided to the crew, including a report about the workshop and any survey responses received from attendees. | [ ]  | [ ]  |
| E2 | A written report or confirmation from the New Zealand entity as to the intellectual property or benefit gained. | [ ]  | [ ]  |
| E3 | Written confirmation from the New Zealand vendor. | [ ]  | [ ]  |
| F2 | A written report on the film marketing partnership from the production. | [ ]  | [ ]  |
| F3/F4 | A written report from Tourism New Zealand. | [ ]  | [ ]  |