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Australia's multi-million dollar game development industry is now stronger than ever. But is our growth sustainable? GameSpot AU checks out the challenges the industry is facing and asks the question: do we really need a local game industry in the first place?

Despite the millions of dollars we spend as a nation every year at the cinema, not many Australians would guess that there's a local industry even more lucrative than film. The fact that video games are now making more money in Australia than the cinema box office would come as a revelation to many, and even more so that a whole local industry exists behind their development.

Yet the video game development industry in Australia is growing bigger every day-- with video games continuing to grow in popularity and the industry's growing international reputation and commercial successes, the industry has the capacity to become the dominant force in the Australian entertainment landscape. But despite the profitability of video games in Australia, there is very little government money actually spent on their making. The games development industry, like all creative industries, needs to be invested in.

Australian developers currently mainly work as fee-for-service contractors, making games by commission from international publishers--coming up with an original game from scratch would cost an Australian developer upward of A\$10 million, something that only government funding would allow to happen. This lack of financial support, along with an ever pervasive skill shortage and only a fraction of the recognition of other entertainment industries, is limiting the full potential of the Australian industry.

Local developers and industry bodies such as the Game Developers Association of Australia (GDAA) have continually pushed for federal government funding--without success--as a way to secure the industry's future growth and its competitiveness on a global scale through the successful development and commercialisation of its own original intellectual property (IP). The industry now fears that without government support the industry cannot prosper, increasing the skill shortage already present and forcing more and more home-grown talent to move overseas. With such a predicament to face, it seems worthwhile to ask the question: does Australia really need a games development industry to begin with?

Show Me the Money

Australian game development studios are renowned throughout the world for producing high-quality games. Just in the past few years, studios throughout the country have been at the helm of some big game releases. Krome Studios has produced Viva Pinata:Party Animals, Star Wars: The Force Unleashed, and Ty the Tasmanian Tiger; Infinite Interactive has Puzzle Quest; Take Two Australia worked on BioShock; Creative Assembly has Medieval: Total War; while Team Bondi has the upcoming LA Noire. Unfortunately, this hasn't been enough to attract the attention of the Federal Government.



BioShock was worked on locally by 2K Australia in Canberra.

Advertisement for the movie 'Babylon A.D.' featuring a character's face and promotional text: 'SHOW US YOUR CAGE FIGHTING SKILLS FOR YOUR CHANCE TO WIN A PLAYSTATION 3 OR XBOX 360!' and a list of scores: 'noodlymince 1884198', 'joe88 1469409', 'Andrew01 430908'. It ends with 'BEAT THESE SCORES AND WIN'.

In April 2007, a very public **debate** broke out between the local game development industry and the local film industry over funding. The GDA called for a federal government grant and the same tax break and 40 per cent rebate being offered to the local film industry. The Screen Producers Association argued that the local film industry shouldn't have to share any of their funding with the video games development industry because video games, unlike films, have little or no social and cultural value. Geoff Brown, a member of the Screen Producers Association, appeared on the ABC's 7.30 Report (on an episode which aired on April 26, 2007), and had this to say about government concessions afforded to the local film industry: "Those concessions, as they currently stand, are primarily for film and television production and they're there to serve the government's social and cultural objectives. The extent to which we can say games fall into that category, we think is problematic to say the least."

This comment sparked heated debate amongst Australia's gaming community. The local film industry is well funded by the Federal Government, with six separate bodies in place, such as the Film Finance Corporation and the National Film and Sound Archive, as well as further tax breaks designed to attract private investment and big overseas productions. This kind of government commitment is something the Australian games development industry is in dire need of.

In 2007, total film gross in Australia was A\$895.4 million, with only four per cent of that total amount coming from Australian-made films. By comparison, Australian game hardware and software sales reached A\$1.3 billion in 2007. The Australian Bureau of Statistics (ABS) conducted a report into Australia's digital game development services earlier this year and found that at the end of 2007, 45 businesses in Australia were involved in the provision of digital game development services, employing over 1,400 people and generating a total income of A\$136.9 million. Of that income, 79.1 per cent was earned from overseas sources, while government funding contributed a mere 1.2 per cent of the total: this is what the GDA has been fighting to change. The GDA has petitioned the Federal Government on five separate occasions to date, submitting countless papers, reviews and proposals for funding with zero success--a baffling response given the industry's current profits and exponential growth rate.



Infinite Interactive's Puzzle Quest is one of the most successful Australian-developed games in recent years.

The GDA was formed in late 1999 by some of Australia's leading developers, with the purpose of increasing the profile of the Australian interactive game industry both locally and internationally. Throughout the years it has grown into the peak representative body for the Australian industry. Tom Crago is the current President of the GDA and also heads up the representative board that is comprised of CEOs from some of Australia's leading game developers. Crago is also the head of Melbourne-based developer Tantalus. He says it is important that Australia keeps its own games development industry.

"It has taken time, but Australia has arrived as a premium destination for game development," Crago said. "We're pretty good at making games in this country, and in a way we always have been. That, for me, seems like a good reason to back it [the games industry]."

Currently, Australian developers get money from development deals and fee-for-service work on licensed titles. This will very likely remain the case until developers have enough funding to work on original IP, which Crago believes is what really drives value. "We've always had to survive by being profitable at what we do," he said. "If we were treated the same way as the film industry by the Federal Government, investors would rush in. This would mean that all Australian companies could grow, potentially tripling the size of the industry and access to talent would flow through our training institutions as they realise the full potential of the industry as an employer of their graduates."

Due to the rapid growth of the industry, the skills shortage is as serious as ever. The same ABS study shows that at the end of June 2007, there were 1431 people employed in the local video game development industry--34.3 per cent artists and animators, 29.1 per cent programmers, and 14.8 per cent managerial and administrative.

"It's about spreading the word that we are a serious and mature industry," Crago said. "Gamers need to ensure that their voices are heard more loudly. Already Australians are spending more money each day on interactive entertainment than they do on movie tickets, and yet for the most part our collective voices go unheard."





Currently, Australian developers get money from development deals and fee-for-service work on licensed titles.

Having already formed a strong bond with universities and colleges offering video game-specific courses, the GDAA will now turn to spreading the message in high schools. "It's really important that parents look at our industry positively, and are prepared to encourage their kids to pursue a career in games."

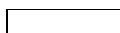
This endeavour to educate and change outdated perceptions will also be useful in convincing the Federal Government to take a serious interest. Whether the government still believes the industry to be too young, or simply just an industry for children, remains to be seen. "What's really disappointing is that, in the case of federal government support and recognition, we are currently wasting such precious time," Crago said. "Each day that we don't grow our industry is a day lost to other countries whose governments understand the value of getting behind it."

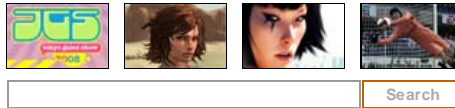
"However, we feel there's a chance that the current Government may see the world differently, and to date our discussions with them have been productive."

So far, the GDAA has been submitting appeals for industry funding to the Minister for Broadband, Communications and the Digital Economy, Senator Stephen Conroy. When pressed why the Federal Government has donated so little funding to the advancement and growth of the local game development industry, Conroy pointed GameSpot AU to a number of government initiatives that the industry already has access to, including the R&D tax concession, the Commercialising Emerging Technology program, Export Market Development Grants, and Enterprise Connect. Yet it is clear that the industry bodies such as the GDAA do not agree that enough has been done. On October 30 this year, the Federal Government will host a roundtable with representatives of the digital games industry including the GDAA, IEAA, and the Australian Interactive Media Industry Association. Conroy says this meeting will enable the government to learn more about the industry.

"We will be able to establish a more coherent approach across government and thus allow the sector to be appropriately considered among broader budget priorities," he said. "The meeting will also be an opportunity to discuss a number of issues facing the industry, such as skills and infrastructure."

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The digital economy

According to Conroy, the Federal Government made an election commitment to examine issues confronting the games industry, including whether it should be able to access the Producer Offset currently available to the film and television industry. He says Australian video games developers need to be viewed outside of their own sector as important contributors to the Australian digital economy.

"It is encouraging to see the job creation and production activity that the digital games industry is generating," Conroy said. "Digital games are an integral part of the digital economy. They create a fun and inviting environment that increases consumer familiarity and confidence in digital technology and digital economy mechanisms."

According to Conroy's department, video games are closely linked with broadband take-up, with around 28 per cent of Australian gamers regularly playing with others online. The Minister believes games developers are important participants in the digital economy, and says there is good evidence that an Australian industry should exist. "The sector is among the most active in the Web 2.0 space with management of online forums and communities becoming a very significant component of digital game marketing," he said.



Game uptake is closely linked to broadband penetration.

A report produced for the GDAA in 2006 showed that over half the companies in the industry were less than five years old and over 70 per cent expected to increase their investment in intellectual property over the next three years. "This shows that games aren't a fringe activity anymore; it's a worldwide industry worth billions of dollars," Conroy said.

Conroy counts himself as a gamer; among his favourites are the original Space Invaders, Donkey Kong, Frogger and Lady Bug. "I don't get much time to play them anymore but note that the advances in game technology are absolutely breathtaking."

If the roundtable meeting proves a success, federal government funding will also mean more international recognition for the Australian game development industry, enticing more overseas publishers to look at investing time and money in Australian developers. Leading the charge in this respect is North American-based publisher THQ, who has been developing its Australian branch since 2003, acquiring Australian developer Blue Tongue Entertainment in the process. Since becoming part of THQ, Blue Tongue Entertainment hired more than 80 staff and has just finished developing the anticipated Nintendo Wii game, **de Blob**.

Vice President of THQ Australia, Steve Dauterman, says the Australian games development industry is a talent-driven industry that can easily compete on the global level.

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Dauterman said. "The challenges are greater but the potential for the Australian development community is most certainly there."

Dauterman got his start in product development at George Lucas' company Lucasfilm Games (which later became LucasArts Entertainment Company), where he spent 10 years working on games ranging from the Star Wars titles to the Monkey Island series. He came to Australia in 1999 with Electronic Arts before joining THQ in his current position.

"When I got to Australia the industry was still a pretty small business," he said. "There were a few successful developers like Auran and Atari, but that was it. But there certainly was a lot of very passionate young development talent."



de Blob may have originally come from Utrecht in the Netherlands, but the new Wii game was designed and built here.

Now overseeing some 200 people in games development in Australia, Dauterman strongly believes that it is important for Australia to have its own industry and aim for original IP whenever it can. "It is critical that we develop original IP. Our team at Blue Tongue in Melbourne has done an absolutely brilliant job of developing the de Blob IP into what will be a worldwide recognisable brand. Original IP that is successful will be identified with the studios that build it, and I am very proud of Blue Tongue for this."

Yet the Australian industry's growth goes hand in hand with the skill shortage that is currently posing a threat to its future potential. Many, including Dauterman, agree that the only way to rectify the situation is to make the Australian industry more attractive to investors, the government and students. "Our business is 100 per cent people and talent driven," Dauterman said. "The industry needs to support the universities and institutions that are building the talent pipelines that feed our companies. A concerted effort needs to be made to attract skilled talent from overseas to help augment the younger talent in Australia with the more experienced talent overseas. But I'm hopeful that this will happen. The industry is already established here, and while relatively small it is well recognised outside Australia as a haven for passionate talent."

Building local talent

Growth of the Australian games development industry has proven stronger in some states than others. The 2007 ABS study of Australia's digital game development services shows that developers with a head office in Queensland accounted for 40.4 per cent of the total income of the industry and 48.6 per cent of employment, while Victoria accounted for 33.2 per cent of income and 33 per cent of employment. This geographical disparity is mirrored in the strength of the educational institutions that are responsible for providing the industry with its talent--Victoria and Queensland remain the two states with the most number of video games development-specific courses in the country. Private colleges such as the Academy of Interactive Entertainment (AIE) and QANTM College focus specifically on interactive entertainment courses, aiming to deliver graduates who need no further training. According to Ian Gibson, CEO of AIE, the lack of development-specific colleges has greatly contributed to the skill shortage facing the Australian game development industry.



Getting more skilled graduates is key for the Aussie industry's development.

"What we lack are whole faculties dedicated to game development," Gibson said. "Most universities offer subjects rather than full courses in this area, and these are often attached to IT faculties, meaning most students have to go through a whole IT degree if they want to learn how to make a video game. What's more, students studying programming and those studying game design never get the chance to work together because these subjects are part of different faculties. What we need are more unified degrees that offer real pathways for students."

The AIE offers both arts and programming courses, developed in conjunction with over 30 game developers in Australia. Student intake has been slowly growing in the last few years, with around 40 students enrolling in each of the college's two campuses in Melbourne and Canberra, there are also plans to open a new campus in Sydney next year. The college advertises throughout state high schools, national media and television as well as having various initiatives such as pathway programs for final year high school students who can choose to study games development at the college during the evenings. According to Gibson, AIE programming graduates have a 95 per cent employment rate while design graduates have a 65 per cent employment rate. "We're trying to get more students enrolled in the programming places, where the real shortage is."

Dawn Riley, National Academic Coordinator of QANTM College, agrees. In her role overseeing the college's three campuses in Brisbane, Melbourne and Sydney, she has found that there is a higher need for games programmers than games design. "Our programming graduates seem to get snapped up pretty quickly," she said.

QANTM offers four video games programming and animation courses with a traineeship aspect that sees final year students working with a local developer. Like the AIE, QANTM works closely with local game developers, who often visit students to answer questions and give demonstrations. Riley says the only way to attract more talent to the industry is to educate students and parents alike about what's involved.

"If we're going to rectify the current skills shortage in the industry, we need to educate. Students coming in to study game development need to know that it's not game playing but game making. It's surprising how many don't realise that. Sometimes it's the parents that are the problem, because they don't see game development as a serious career for their kids. Once we talk them through the export value of the Australian games industry they see it in a different light."

Following in the footsteps of private colleges like the AIE and QANTM, more universities around Australia have begun to introduce or expand courses in video game programming and design. The problem that remains is getting these courses up to scratch.

"Most of these courses do not have sufficient depth," Professor Yusuf Pisan from the University of Technology in Sydney said. "This results in graduates who do not have sufficient skills to make a long-term contribution to the games industry. This results in the poaching of employees from one company to another, which is not a sustainable model. While every company wants to hire experienced employees, the industry as a whole needs to make space for new graduates, otherwise it will end up starving itself to death."

Last year Professor Pisan led an international multi-university effort to produce the 2008 IGDA Curriculum Framework that provides educational institutions with general guidance in what should be taught in a games development course. He is currently working towards a local project that, if successful, will see local game developers actually structuring educational programs at universities. He says a lack of communication and collaboration between the educators and industry has led to the current skills shortage that is stunting the growth of the industry.

"The games development industry is expanding and needs more competent people," he said. "Educators need input from industry explaining their needs and a better understanding of game companies and pipelines."



Skilled graduates are an essential building block to create an Aussie industry.

The successful recruitment of new talent is vital if the Australian game development industry hopes to grow. Queenslander Troy Smith, 19, is hopeful his skills will land him a good job in the industry. Halfway through his Diploma of Multimedia at the Sunshine Coast TAFE, his plan after graduating is to look for a development position in animation in the Brisbane area.

"I'm hoping that by the end of the year I'll have done some good work with the Unreal Editor and Flash, so that when I do graduate I'll have something of a folio to show off," Smith said. "I want to show potential

employers that I have an interest in the industry as well as the skills to back up the interest."

Smith says his parents were sceptical about his decision to pursue a career in the games development industry, but came around in the end. "I think the sales figures for GTA IV might have changed their minds; that and the fact that the industry in Australia is definitely growing. Electronic Arts' buyout of Pandemic, the success of Puzzle Quest and BioShock, the amount of money that was thrown at Fury--this all points [to] an increasing interest in the industry here [in Australia]. I doubt it'll ever be as good as the US and Japan, mostly because Australia is still such a small gaming market compared to other countries. Add that onto the comparatively prehistoric view on gaming by the Australian government, and the case for developers setting up shop here starts to get weaker."

Smith says that game studios could also do more to attract students by teaching them about what's involved in making a game before they embark on studying an area of game development, which they may not find fruitful after graduation. "I'd prefer to stay in Australia to work, but if I'm not successful then there are a lot of opportunities elsewhere, especially in the US and Canada."

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Aussie Exports

The lack of opportunities in the Australian development industry to work on higher-quality and bigger name games titles has, over the years, pushed much home-grown talent overseas. This is something that the current industry is trying to stop, and in effect reverse the poaching of talent from overseas to work on Australia shores, which would then ensure rapid growth and prosperity.

Australian Andrew Wilson created a name for himself in the overseas games development industry overseas when he left Australia four and a half years ago to head up Electronic Arts' EA Sports Football division as Executive Producer in Vancouver. "I wanted to build games with real budgets and bigger teams, so that they could turn out to be quality products," he said. "I moved because the budget I had in Australia meant the games I wanted to build would not turn out as good as I wanted them to. I managed to convince someone that I knew what I was doing and here I am."

Born in Geelong, Wilson grew up in Queensland and moved to Sydney where he studied law. While working at a restaurant he met the then EA Pacific President, to whom he professed his love of video games. Not long after this meeting, Wilson found himself working at an EA studio on Queensland's Gold Coast where he was responsible for poaching licences from international surfers for an upcoming surfing title. He was there for three years before the studio shut down.



One of EA's biggest global franchises-FIFA-is headed by Aussie expat Andrew Wilson.

"At the time I entered the development industry there was a global phenomenon happening--the concept of the super studio," Wilson said. "Emerging big studios with big investments were popping up all over the world, and because Australia was such a long way away it was tough to get involved."

Skill shortages preyed on the industry's growth even then--some 30 to 40 per cent of people working with Wilson at EA in Queensland were brought in from overseas. Wilson says this is something that hasn't changed over the years. "The skills shortage is present in the worldwide games development industry, not just in Australia," he said. "Vancouver has more video game developers per capita than any other city in the entire world and EA has over 2,000 people building video games out there. It just comes down to the ability to attract talent."

Wilson thinks this is a challenge for Australia given its geographic location. "I know that there are a lot of people who would love to come to Australia and work, and they often ask me why I left in the first place. I left because the opportunities to work in bigger studios were overseas and compensation was more handsome and I was able to mix with more people that do what I do."

Wilson is passionate that the Australian industry will grow even more over the coming years. "When I first started in the industry, Australia and New Zealand were operating on a cost basis, so it was cheap for US companies to come down here and develop their games. In my opinion that switch was flipped a few years ago. That's been the real improvement for the local industry--publishers now come to Australia

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because we're quality developers, not just a cheap place to make games.

"As a result, when I'm looking at development, I'd love to bring it out to Australia. The reality with video game developers is that most people don't really mind where they live nearly as much as what they work on. They want to build great games, and work for the best people. As Australia starts to build local talent, a snowball effect will happen to a point where it will become easier and easier to get people down here to work. We're starting to deliver unbelievable product, and attracting development talent is only going to get easier. That's the kind of thing people will move across the world for."

Another Aussie who tried his luck overseas is Chris Ansell, 33, who is the Director of Studio Marketing for Radical Entertainment, and is also based in Vancouver. Ansell studied economics and marketing at the University of Wollongong, but left Australia 11 years after starting out in the industry working for Sony.

"I knew that I didn't want to market fast moving consumer goods since it's hard to get me excited about selling soap or corn flakes," Ansell said. "I asked myself what I loved most and the answer was immediate--games. I called Sony in Sydney and I offered my services for free for two weeks as a way to get my foot in the door and get some invaluable work experience. Over that time, the team there realised they needed a game guru who could help in the PR department, and the rest is history."

After scoring a position with Vivendi Games in Singapore, Ansell moved on to work with Radical, where he offers support to the studio's development teams on the essential marketing assets required to successfully launch video games. "The chance to actually sit within a large studio and support their needs was too good to pass up. In addition, the chance to work on Radical's incredible new original IP and work with the super-talented Crash Bandicoot team was a major sweetener."



Australian studio Krome developed the PS2 and Wii versions of global hit The Force Unleashed.

Ansell believes that Australia needs its own games development industry, though he acknowledges the uphill battle facing the industry when it comes to attracting talent from overseas. He says the country is still a long way away from bringing the mass market into the world of gaming. "Australia has incredibly skilled people. Good policy would dictate a great need for supporting innovative development of software that drives new business to the Australian economy. The level of talent from Australian shores though is equal to the best in the world, so it's really got everything to gain as long as the support is there from the government. Singapore and Korea have both benefited greatly from strong direct support of local interactive entertainment initiatives by governmental bodies."

Ansell says the skills shortage in the Australian industry is symptomatic of the same general concerns globally, where only mass market acceptance of game devices in the living room will ultimately expand the size of the labour market. "I think as our generation moves into positions of authority over the next 10 to 20 years, our familiarity with video games as a true art-form will also help lure talent away from more traditionally accepted industries. It won't be long until even our politicians will have all played or experienced games like Guitar Hero at least once."

Lessons learned

The message from the GDA's Tom Crago and other industry leaders seems to be that the industry's future prospects--with the injection of some government funding--are positive. Without this support, it can still be a rough environment for games development companies in Australia. One developer that found this out the hard way was Auran, whose studio closure last year sent **shockwaves** throughout the industry. Counted as one of Australia's biggest development studios at the time, Brisbane-based Auran was just two months into the release of its original IP--massively multiplayer online game **Fury**--when it announced that it would be going into voluntary administration and laying off all employees. Eight months later, Fury's servers were shut down. Auran CEO Tony Hilliam says the message to learn from Auran's example is loud and clear.

"The biggest lesson I learnt from this is don't bite off more than you can chew, and don't start something you can't finish," Hilliam said. "For the industry as a whole, the lesson is that unless you have the budget, the skills, the marketing dollars and a gap in the market to aim at, then don't try and take on the big boys. Find your niche or stick to work for hire."

This is good advice from a man who knows what can happen when a studio gets too eager about creating original IP. At the time of its release, Fury was one of the most ambitious games to come out of an Australian games studio, and was the first game to feature the coveted 'Australian Made' logo on the box. The game, which received lukewarm review scores globally, reportedly cost close to A\$15 million to make. Undoubtedly, there was a lot riding on it for Auran.

"We tried to create a product that would be 'best in class' in an area that no one else had succeeded--the perfect player-versus-player game," Hilliam said. "There was definitely a combination of factors why Fury failed: budget, business model, design flaws, competitive market, and pressures to release before we

were ready, and even the psyche of the player base we were targeting. That's quite a list."

Although Auran Developments no longer exists, Hilliam continues to work at Auran Games, developing the long-running **Trainz** franchise which is still operational. He says the first few months were the toughest to deal with.

"I actually spent the first few months trying hard not to have a total mental breakdown. It was a very hard blow to see years of effort turn to dust, but over time I realised that we had done all we could to make it work."



Fury is a sad example of an original Aussie IP failing.

Hilliam agrees that Auran could have done with more government financial support when making Fury, something that could help local development studios from suffering the same fate as Auran. "Money was a big problem. Ultimately we released the game before it was polished enough to stand up in today's competitive environment. A government HECS scheme [similar to that of university students] would be a good initiative for the industry, where we could pay the income tax back out of our revenues."

The Federal Government only stepped in to support Auran when it was too late, paying the outstanding staff entitlements when Auran Developments shut down. If the same money had been present some six months prior, the studio might have managed to pull through.

"The industry needs money, there's no doubt about that. Whether it comes from government directly or indirectly by encouraging investment, it is definitely needed for the industry to survive."

This thought is echoed by GDA President Tom Crago, who believes that with a tax-offset similar to that of the Australian film industry, the video game development industry could triple in size within a short period of time. "The big caveat here of course is access to talent, but if we can overcome that obstacle the sky really is the limit," Crago said. "It is conceivable that in time we could have as many developers employed here as in other hubs like Canada and South Korea. There is absolutely no reason why that can't be the case. And we could emerge as a leader in certain areas."

"In such a dynamic industry, though, this concept of 'what we're good at' is likely to be far from static. It will always be driven forward by those Australian companies who are innovating and who, absolutely, are the equal of developers anywhere in the world."

Do you agree or disagree? Leave us your comments below and tell us what you think about the future of the Australian games development industry.

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