

Film  
i Väst

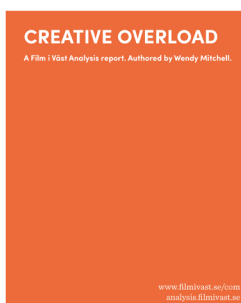
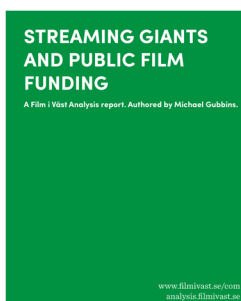
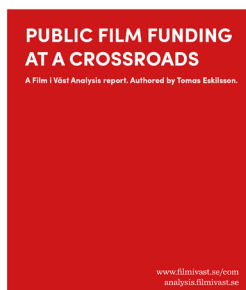
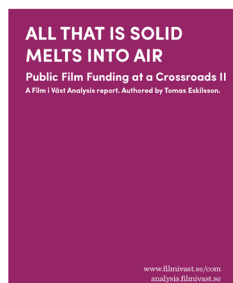
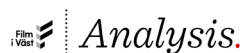


# *Analysis.*

## **PUBLIC FILM FUNDING AT A CROSSROADS II**

Appendices

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## ABOUT PUBLIC FILM FUNDING AT A CROSSROADS

*All that is solid melts into air* – *Public Film Funding at A Crossroads II* was launched in Venice in August 2022. Along with the first report *Public Film Funding at A Crossroads* it can be downloaded at [www.analysis.filmivast.se](http://www.analysis.filmivast.se). Here you also find the ten territorial reports, executive summaries, with strong links to the main topics. There you also find **Michael Gubbin's** report *Streaming Giants and Public Film Funding* and **Wendy Mitchell's** study *Creative Overload*.

Appendix 1	Topics for the interviews
Appendix 2	Survey to filmagencies
Appendix 3	Status of Article 13's transformation across Europe
Appendix 4	Presentation of the experts

### Focus group

Eastern Europe (Assistant Professor **Petar Mitric**, Producer Joanna Szymanska)

French speaking Europe (Senior Consultant **Vincent Leclercq**, Senior Consultant Philippe Reynaert)

German speaking Europe (Senior Consultant **Manfred Schmidt**)

The Nordics (**Katarina Krave**)

UK (**Bengt Toll**, Associate Professor **Lydia Papadimitriou**)

### Close-up

Flanders (Producer **Ilse Schooneknaep**)

Italy (Senior Consultant **Rickard Olsson**)

Netherlands (Senior Consultant **Doreen Boonekamp**)

Portugal (Visiting Professor **Nuno Fonseca**)

Spain (Journalist **Irene Jiménez**)

French speaking Belgium (Senior Consultant **Philippe Reynaert**)

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### **Appendix 1** Topics for the interviews

#### **PUBLIC FILM FUNDING AT A CROSS-ROADS II – A BRIEF PRESENTATION**

*Public Film Funding at A Crossroads II* (PFFC II) aims to deepen the discussion around some of the most crucial issues for public film and audiovisual policies and for public film agencies in the mid- and long-term future. We have also included some of the most discussed and debated questions in the sector.

PFFC II should bring additional knowledge and insight that complements PFFC and paves the way for PFFC III that will focus on answers (linked to the overall thesis and questions (see PFFC)), recommendations and suggestions.

PFFC II will be based on interviews with approximately 300 key persons in Europe's film- and audiovisual sector, on dialogue with our territorial reporters, on lengthy carefully moderated meetings with focus groups of experts, and on a questionnaire survey. We will continue to do workshops and dialogue seminars around the study's topics across Europe and add insight from those to the report.

It is our strong belief that reflections, discussion and debates about the purpose/s, relevance and attractiveness for public film funding will grow in importance over the next couple of years.

#### **THREE FOCUS AREAS**

How do private and public stakeholders interpret external factors impact on the audiovisual industry/sector (inflation, the risk for stagflation/recession, the cost crisis for households around Europe, political instability, authoritarian and illiberal tendencies, Russia's ambition to create a multipolar world/the war in Ukraine etc.)?

### ***Purpose for public policies and operations***

- Purpose for public selective film funding in the mid-term future given the paradigm shift, the content boom, the change of power structures and the unprecedented growth of available capital
- Arguments/necessity/urgency? Reality cheque: what obstacles exist for selective public film funding to maximize its purposes? What strategies need to be developed to maximize the outcome of selective film funding in the mid-term future?
- Priorities and scope – to deal with market failures (in a cultural policy context) or something different: why is public support essential and necessary for different audiovisual expressions and formats?
- Selective vs automatic? How create a consistent argumentation for public ‘film funding’?
- Public film funds in transition? Do they need to change? In what aspects and how? How build strengths and deal with weaknesses?
- (How should public film agencies deal with the perceived lack of competence about the evolving ecosystem, the lack of speed in decision making, the lack of predictability, and the impression of over bureaucratisation?)
- Proactive or reactive (media chronology/window model, capacity...)?
- Can and if so how can public film funding continue to be urgent and attractive after the paradigm shift?
- Do ‘we’ fund too many films meant for traditional cinema distribution?

### ***How should we (‘public film agencies’ and ‘the industry’) relate and act in the transformed eco system***

- Public film agencies relation to and with streaming giants?! Do they need and how can they cohabite?
- How can ‘they’ cooperate and on what terms; pro and cons for public film agencies to operate in the Grey Zone
- IP, independent producer, creative and artistic control – sustainable definitions in the transformed ecosystem
- Grey or black and white principles regarding IP (ownership and/or control), independent producer, creative and artistic control for public film funding? Principles for the industries relation with streaming giants? Or no principles? Regulations? Harmonisation?
- How will business logics and business models continue to evolve as a result of changes in the ecosystem/the paradigm shift? How will this affect public film funding?
- AVMS(D) paragraph 13 status, implementations; OECD’s two pillar solution and AVMS(D), paragraph 13; levy vs investment obligation – a reflection

### ***The market and the audience***

This part evolves around how we will and ‘should’ consume ‘film’ in the mid-term future and depending on the answers what public film funding need to do to make that happen.

We have more and more content that we potentially can watch. Each week offers a massive amounts of premieres targeted for different audience categories. The question is if it is possible for the individual to identify what ‘window’ offers what title. The movie theatres way to handle the situation is to concentrate on fewer titles and give them better curation and a substantially bigger capacity. This is in itself a challenge for public film funding with its strong links to the cinema experience.

- Is the movie theatre crucial to secure strong shared experiences also in the mid-term future – and if so what is a strong shared experience... and if yes on the first what need to be done by public bodies and private players (read cinema owners) to secure that?
- How handle the overproduction of small cinema films with limited or very limited possibility to reach an acceptable audience via the traditional distribution model?
- Bigger support to fewer local cinema films – the way forward given the paradigm shift and changes in the business models for movie theatres?
- How will we define ‘film’ in the future, how will cinemas define ‘film’ in the future
- Cinema/the movie theatre as the church in the middle of every town/village or a luxury chapel for the cultural elite in bigger cities? The movie theatre in the mid-term: cultural venue or film palaces? And if it is important also in the future with domestic cinema films – how do you enlarge the audience? And if less is more how do you then secure capacity for home market films?
- The window model/the media chronology – friend or enemy when one should maximise the outcome for each publicly supported title (film; drama series etc.)
- Public service broadcasters are under attack. What should be PBS scope when it comes to different forms of content? Do we need PBS to fund drama series and other form of content based upon storytelling on cinematographic ground?
- Platform neutrality and the question how we should secure how each title with support/investment from a public film agency maximize its outcome measured in this context as audience reach – the window model a prison or a necessity to reach and maximise the audience?

### **TO EUROPEAN PUBLIC FILM FUNDING AGENCIES**

The report *Public Film Funding at A Crossroads* (PFFC) was published in the beginning of March 2022 and has since been presented and discussed at several events around Europe. One explicit aim of the study was to create a platform for discussion and debate about film policy and its practices around Europe in the light of the extreme and rapid changes the industry has gone through the last decade.

The themes, issues and recommendations presented in PFFC are primarily to be seen as a foundation for further reflections, and therefore regular updates regarding the major changes in the ecosystem; film policies; and film agencies practices is required.

*Public Film Funding at A Crossroads II* (PFFC II, to be published late spring 2023) aims to deepen the discussion around some of the most crucial issues and topics for public film and audiovisual policies and for public film agencies in the mid- and long-term future.

PFFC II will be based on interviews with 100+ key persons in Europe's film- and audio-visual sector, on dialogue with our territorial reporters and with focus groups of experts. We will continue to do workshops and dialogue seminars across Europe and add insight from those to this second report.

It is our strong belief that reflections, discussion and debates about the relevance and attractiveness for public film funding will grow in importance over the next couple of years.

The attached questionnaire aims to give a broad overview on public film agencies take on some of our study's main topics. The survey will be a very important supplemented to our interviews.

The questionnaire takes approximately 15 minutes to complete. We appreciate if we can have your answer latest February 1, 2023. All answers are of course anonymized.

The reports are commissioned by Film i Väst and made in collaboration with Cine Regio

The PFFC report can be found at [www.analysis.filmivast.se](http://www.analysis.filmivast.se)

For questions concerning the survey and the study please contact Tomas Eskilsson [tomas.eskilsson@filmivast.se](mailto:tomas.eskilsson@filmivast.se) Katarina Krave [katarina.krave@filmivast.se](mailto:katarina.krave@filmivast.se) Bengt Toll [bengt.toll@toll.se](mailto:bengt.toll@toll.se)

## **Appendix 2** *Survey to filmagencies*

### **THE SURVEY**

Please note that all answers will be anonymized, and the results will be presented aggregated.

1.

To be able to encompass and fully understand the great shift that has taken place over the last ten years we have used the terms “old world” and “new world”. The old world describes the ideology behind the European traditional funding system dependent on a mixture of private and public funding.

What of the following, mark one or more, has most relevance to your present operation?

- Film as an art form
- Diversity in all its senses
- Cultural and artistic freedom
- Strong cultural references
- European ownership
- Independent production companies owning underlying rights (IP)
- Rights handled individually territory by territory/ nation by nation
- The cinema theatre as a central place for shared experiences
- Prefer not to answer

2.

The “new world” is used to describe what has happened in the industry after the American based platforms established themselves in Europe.

What of the following, mark one or more, does in your in your opinion best characterize the way the streaming giants operates?

- All global rights acquired by the commissioner
- Artistic and creative freedom is mostly restricted
- The attractiveness of local content
- Demand for generic storytelling
- Royalties for directors, scriptwriters and cast members
- Production companies being turned into service providers
- Speed in decision-making, no bureaucracy and huge earning potential
- Prefer not to answer

3.

Today the old-world ideology creates a red line in Europe that streamers should not cross. At the same time there is a growing need to find

ways to coexist. A large part of the production that takes place in Europe of today is commissioned and financed by the global streamers. The purpose and perspective of a regional and/or national public funder or broadcaster could very well be obtained by coproducing with a streamer but that means giving up parts of one's principals.

Looking five years ahead. What of the following will, in the view of your organization, be the most likely scenario:

- It will mostly stay as it is today and the red line will prevail
- It has changed dramatically
- Broadcasters will lead the way
- European production companies working for streamers will be eligible for support
- Parts of the rights will stay with the producer
- Regional agencies will reach special agreements with streamers to empower their regions
- Prefer not to answer

4.

One finding in our first report was a practice we have called the “grey zone”. The red line has been crossed or at least stretched when public film agencies, broadcasters, global and transnational streamers, and producers agree to give and take to coproduce.

Has your agency been involved in any such agreements?

- Yes
- No

If yes, what were the main arguments for doing so? Mark one or more of the following.

- Our producers benefit from it
- In order to ensure production in the region
- To help reach maximum production value
- Initiating new types of support mechanisms to facilitate coexistence
- Prefer not to answer

5.

Looking five years ahead, considering the present situation for the traditional European cross border coproduction, which of the following does best describe your view? Mark one or more.

- It will stay the same
- There will be an increasing amount of co-productions
- There will always be a market for regional co-productions
- A model for reciprocity will create new possibilities for co-productions



- Documentaries will be even easier to co-finance
- There will be even fewer co-productions than today
- The broadcasters will show less and less interest in co-productions
- There will be no market for European co-produced features
- We will not support minority co-productions at all
- Prefer not to answer

6.

In our consultations for the first report, Public Film Funding at a Crossroads, we noticed quite a strong criticism against national and regional agencies from all parts of the industry. They were concerned with the way the agencies worked and pointed at

lack of competence, no real knowledge of the fast changes in the industry and complained about bureaucracy, no predictability and slow handling processes.

We agree in part and have started a process of restructuring looking at:

- Competence
- Bureaucracy
- Predictability
- Handling processes
- We find most of the criticism as irrelevant
- Prefer not to answer

7.

In your view, looking five years ahead from now, what has become of the streaming market?

Mark one or more of the following.

- The streaming economy has grown in Europe
- SVOD remains the leading output
- AVOD has become much more important
- Netflix is no longer sole spearhead
- More, locally based, niche platforms have taken up the competition
- The global giants compete with broader content: news, sport, reality shows
- Consolidations and mergers rather than new big newcomers
- More European public broadcasters have set up their own platforms to compete
- Number of productions commissioned by global streamers is still very high
- The global streamers have lost their ground
- The number of productions commissioned by the global streamers has gone down

- Cinemas, broadcasters and local platforms have grown on the big one's expense
- Prefer not to answer

8.

The position of the movie theatres and cinema films in Europe has undergone significant and dramatic changes over the last years. The changes started already before the pandemic kept audiences away from the theatres. And they have not yet fully returned.

The big challenge ahead is in short – who is going to watch what where.

How do you imagine the situation for movie theatres and the cinema films in your region/country five years from now?

- In five years the theatres are back and beyond pre pandemic figures
- The situation has become even worse than today
- Theatres have shut down in large numbers
- The box office revenues are non-existence to the art house cinema
- Ticket prices are too high, movies in theatres have become an exclusivity
- We have introduced support mechanisms to keep theatres open
- We have introduced measures to reduce to number of films produced
- Prefer not to answer

9.

Scarcity of work force, lack of capacity, is an issue in most European countries. A fast change is needed not to slow production down.

What of the following is in your opinion necessary measures to take and who's responsibility is it to take them?

- Increase regional education and initiate local career ladders
- The industry itself must solve the problem
- Capacity is a sole responsibility for the national level and its educational systems
- Public agencies must initiate mechanisms that actively put pressure on the industry
- Prefer not to answer

10.

Do you think that the present expressed purpose for your operation is well suited to meet the challenges in the new economic and cultural environment?

- yes
- no

If no, who must initiate the necessary adaptations?

- The owner
- The operation itself
- The policy makers
- Prefer not to answer

11.

As of today, more than 30 European countries have introduced Incentives of various sorts aimed at production of audio visuals. 25%-30% of eligible spend is the rates offered in most cases but there are examples of much higher rates and there is a tendency that the offers are increasing. There has recently been a growing concern raised over the present situation. In your opinion, mark one or more of the following.

In your opinion, mark one or more of the following:

- The growing Incentives may pose a threat to the selective film funding systems
- The Incentives and the public funding systems supplement each other
- In the long run regulation of the European Incentives is inevitable
- Prefer not to answer

12.

Please use the following space for any comments to the survey

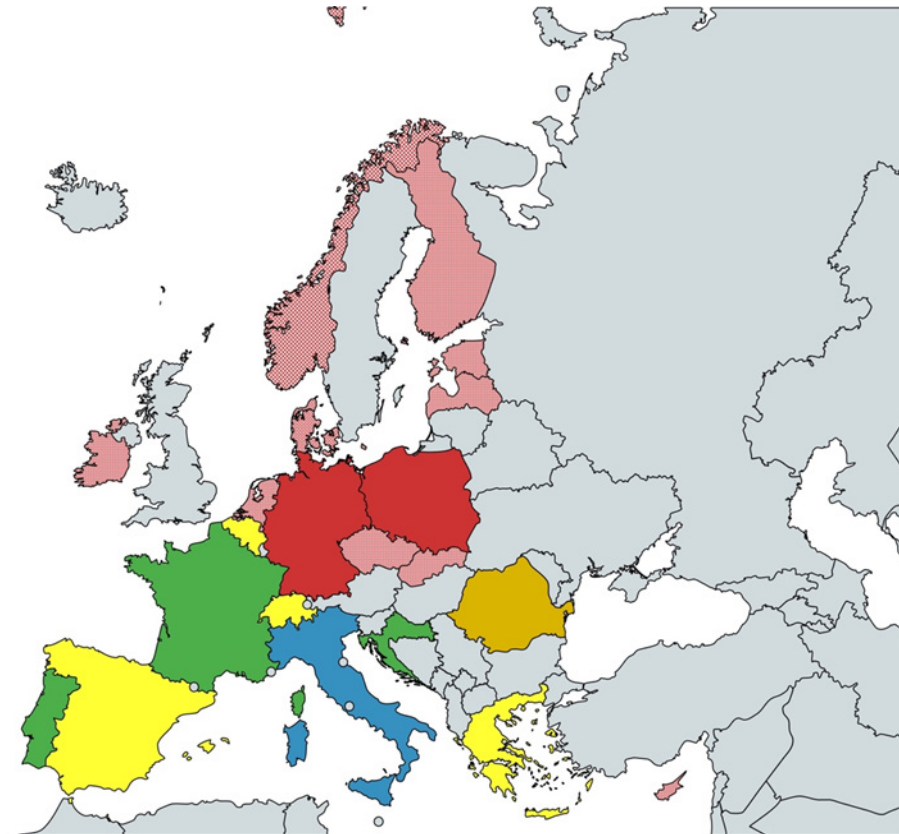
### **Appendix 3** *Status of Article 13's transformation across Europe*

#### **Obligations for streaming services to invest in local European content**

Obligations for streaming services to invest in local European content

- Levy only
- Levy and Direct investment obligation
- Direct investment obligation only
- Direct investment obligation or Levy
- Levy (sometimes partly Direct investment obligation)
- Under negotiation

Created with mapchart.net



The map adapted from Mitric, P (2023), *The End of European Co-production?: Independent Producers and Global Platforms in European Film in the Streaming Era*. Palgrave Macmillan

## Appendix 4 Presentation of the experts

### AUTHORS

#### Belgium/Flanders

Producer **Ilse Schooneknaep**, Finders Keepers. After a master in Communication Science (University of Brussels), a Master in Film Studies (University of Kent) and a Fulbright Scholarship in the US, Ilse Schooneknaep started her research career at the VUB with the Mecetes project. She's currently finishing her Phd on the digitalization of film distribution and European audiovisual support mechanisms designed to boost distribution. She currently puts her academic research into practice as a creative producer while teaching film and copyright law at the RITCS film school.



#### France/French-speaking Europe

**Vincent Leclercq**, founder of VLQ Consulting, based in Paris, specialized in strategic thinking and change management. Started as director and producer of documentaries. CEO of Pictanovo, the Northern France Film Agency, during 10 years then joined the Centre National du Cinéma (CNC) as director of audiovisual and then director of transformation.



Senior Consultant **Philippe Reynaert** in collaboration with Xanadu. Teacher in the 70's, film critic in the 80's, adman in the 90's and head of an audiovisual fund (Wallimage) during the first 20 years of the 21st century, Philippe Reynaert was also the founder and chairman of Cine-Regio, the European Network of Regional Film Funds and the cinematographic face of the Belgian public TV (RTBF) for 30 years. Today he acts as audiovisual adviser in the frame of Xanadu, his own consulting company.



#### Italy

Senior Consultant **Rickard Olsson**. Rickard is a film industry consultant and freelance producer, based in Turin, Italy, and with over 25 years of experience in various positions for companies, programs and institutions across the European audiovisual sector. He holds a master's degree in audiovisual management and regularly serves as advisor for international markets, funds and festivals.



#### Netherlands

**Doreen Boonekamp** (1968) is a seasoned chief executive officer and supervisory board member with a demonstrated history of working



in the screen industries since 1990. She has extensive experience in policy and executive collaboration at governmental and EU level, evaluation and funding of film and tv content, talent & skills training and film festivals. She currently is active as an independent strategy and public policy advisor. Among her roles, she currently chairs the Platform ACCT Film/AV "chain table", leading the dialogue to achieve better working conditions for professionals in the Dutch audiovisual production sector. From October 2009 till October 2019, she was the CEO of the Netherlands Film Fund. Prior to this, she served as the Director of the Netherlands Film Festival for a period of 8 years. She previously also worked for the Netherlands Film Festival and the International Film Festival Rotterdam holding different positions. She is a member of the European Film Academy and has earned degrees in Art Management from HKU – University of the Arts Utrecht and in Public Administration from the University of Amsterdam.

### **Portugal**



**Nuno Fonseca** is a visiting professor of Production and Film Policy and Law at the Film and Theatre School (ESTC-IPL, Lisbon) and, for more than twenty years, a senior advisor for international affairs, policy, funding and coproduction at the ICA (the Portuguese national film agency). He has participated in the drafting of national and international policy and legal instruments, including cash and tax rebate systems and coproduction and codevelopment funds. He has also a wide experience in international coproduction funding and project evaluation. He represents its country in Eurimages, and he has been a member of several expert or working groups at European level. Previously, he was an advisor of the Secretary of State for Culture (1997 - 2000), after a technical career in an EU institution in Luxembourg. He translated literary and philosophical works and wrote creative texts for radio and other media.

### **Spain**



**Irene Jiménez** is a trade journalist, focused on the Spanish film and TV industry, since 2006. Co-founder of online media Audiovisual451.com, she covers national and international events and also writes for London based magazine *Television Business International*.



With a Degree in Audiovisual Communication from the University of Navarre, **Mar Izquierdo** worked for 12 years in the film industry as Production Coordinator, particularly in international projects, also combining it with television programmes in Spain, Portugal, Italy and Greece, in the role of Production Manager. In 2016, she returned to



Donostia/San Sebastián to become a member of the production team of DSS2016EU European Capital of Culture, where she carried out tasks for the project's production logistics. Since then, she has combined the production of a variety of cultural projects such as dFeria, Jazzaldia, concerts, etc. In 2020, she became a member of the management team of the EGO (Basque Youth Orchestra), and also fulfilled production coordination and stage management functions. Finally, in 2021, she started working at Zineuskadi as a Coordinator, managing grants and the Zinema Euskaraz project, among many other tasks.

### ***Germany/German-speaking Europe***

Senior Consultant **Manfred Schmidt**. 1969–81 Berlin “Maxim Gorki” Theatre. 1981–88 free-lance author and dramatic adviser. 1988–90 script analyst and author DEFA studios. 1990–92 deputy chief editor. 1992–98 deputy programme director for culture and science Broadcaster MDR. 1998–2016 CEO Mitteldeutsche Medienförderung. Lecturer and consultant. Member Artistic Board SCRIPTEAST, Expert Committee IDM Film Fund South Tyrol and Selection Committee Vienna Film Fund.



### ***Greece/Cyprus***

**Lydia Papadimitriou**, Liverpool John Moores University. Lydia Papadimitriou is Reader (Associate Professor) in Film Studies at Liverpool John Moores University. Her research focuses on different aspects of Greek and Balkan cinema, with particular emphasis on screen and media industries. She has published on issues related to film financing, co-productions, (digital) distribution, and film festivals, among others. <https://www.ljmu.ac.uk/about-us/staff-profiles/faculty-of-arts-professional-and-social-studies/liverpool-screen-school/lydia-papadimitriou>.



### ***Eastern Europe***

**Petar Mitric** is Assistant Professor at the Section of Film Studies and Creative Media Industries at the University of Copenhagen. He has published widely in European film policy and co-edited the book *European Film and Television Co-production: Policy and Practice*. He has also collaborated as a consultant with many European organizations, including the Czech Film Fund, Film i Väst and TorinoFilmLab.



Producer and development executive, industry activist, **Joanna Szymanska** is a graduate of Film Studies and Law. Alumna of international workshops including: EAVE, ACE and Torino Script Lab (Story Editing). In her 15+ years career she produced numerous shorts,



feature-length fiction films and international co-productions. She is a founding member of Polish Producers Guild and a former member of European Film Academy Board (term 2017-2023). She is currently working on her PhD at Lodz Film School.