

Film  
i Väst



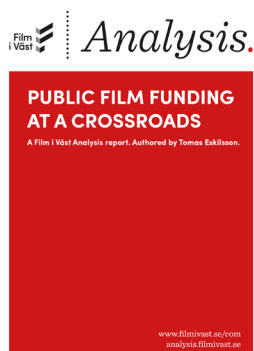
# *Analysis.*

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

### Appendix: The Nordic Region

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## ABOUT PUBLIC FILM FUNDING AT A CROSSROADS

*Public Film Funding at A Crossroads* was launched in Brussels in March 2022. 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 in *Public Film Funding at A Crossroads*. There you also find **Michael Gubbin's** report *Streaming Giants and Public Film Funding*. In May, during the Cannes Film Festival, Wendy Mitchell's study *Creative Overload*, will be published at the same web site.

### Appendixes:

- Eastern Europe (Assistant Professor **Petar Mitric**)
- Flanders/Netherlands (Producer Ilse Schooneknaep)
- French speaking Europe (Senior consultant **Philippe Reynaert** in collaboration with Xanadu) - also in French
- German speaking Europe (Senior consultant **Manfred Schmidt**)
- Greece/Cyprus (Associate Professor **Lydia Papadimitriou**)
- Ireland (Dr **Mark Rainey** et al in collaboration with the WRAP Fund)
- Italy (Senior consultant **Rickard Olsson**)
- Spain/Portugal (**Belén Álvarez** et al in collaboration with Gabeiras& Asociados)
- The Nordics (**Tomas Eskilsson, Katarina Krave, Bengt Toll**)
- UK (MD **Leon Forde** et al in collaboration with OSPI)

## THE NORDIC REGION – AN EXECUTIVE SUMMARY

Film i Väst, has in collaboration with Cine Regio AISBL (the European regional film funds' organization) and with valuable contribution from Nostradamus/Göteborg Film Festival, decided to carry out a pan European study focused on the challenges currently facing public film funding, titled *Public film funding at a crossroads*. The report was commissioned and fully financed by Film i Väst. The work with the report was led by Film i Väst Analysis, a separate unit within Film i Väst. The complete report could be downloaded at: [www.analysis.filmivast.se](http://www.analysis.filmivast.se).

The Nordics were made as the study's pilot. 110 interviews were made in two periods, January–March 2020, and December 2020–early March 2021. Follow-up interviews were made with persons interviewed during the first period in the beginning of 2021.

### Background

During the second half of the 2010s it became increasingly obvious that film policy and its current practices in Europe were at risk of becoming obsolete. This was no great surprise. Since the beginning of the new millennium the conditions have existed that would make it possible to organize production, distribution, and screening of film in a completely different way. Increased digitalisation has brought about radical changes in the physical means by which films are made, circulated, and consumed. Digitalisation has led to a crisis of identity for many media, including film.

But while crisis is often the mother of innovation, the European film policy took a far slower 'don't worry, be happy' approach. Only when the sector's globalisation was a fact, and both new and old cash-rich American-owned media companies became pivotal players in the

European sector, did alarm bells start ringing: How could Europe continue owning and controlling its intellectual property? Who would have creative and artistic control? How could independent production companies continue to exist? How could the traditional European co-production model be preserved? Which companies would carry on producing and distributing European content to cinemas? And how could the essence, diversity and undeniable cultural ethos of European film be safeguarded? Questions abounded and they remain unresolved.

All the above means that the role, focus and relevance of public input in the film industry must be reconsidered. A public film funding body may well choose to bury its head in the sand and hope to reemerge a while later into a world that is the same as before. The risk, however, is that in the meantime politicians and decisionmakers have decided that it is best to leave the head buried, and to add the rest of the body as well. This report, *Public Film Funding at a Crossroads*, examines the reasons, meaning and relevance of public input in a fast-changing world, one where the conditions for financing production, organising circulation and screening film have fundamentally changed. What should the public sphere protect, and what are its chances of success?

The sub report uses 'film' in a broad sense, referring to all audiovisual forms of story-telling.

The broad principles and values (also referred to as 'ideology' in this report) that underpin the policies of public film agencies in Europe, aim to safeguard: cultural/artistic idiosyncrasies with territorial reference; film as an art/culture form; diversity in all its senses; European ownership; independent production companies that own the underlying rights, and along with the filmmakers have artistic freedom and creative control; rights handled territory by territory; and cinemas as a central places for shared experiences.

Private sector players, however, have a highly pragmatic attitude towards the above. When offered the opportunity to make a lucrative deal with a large global player production companies and filmmakers are prepared to lose ownership, artistic freedom and creative control. The realities of the global market take precedence over any adherence to principles. This is understandable and one cannot moralize over it.

So how should public film policy be formulated and understood now, in 2025, and up to 2030? Will policy and practice follow the attitudes and approaches taken by private players in Europe? Or is there another way?

We hope that you who read the report (including the sub report) sometimes will be provoked. What is happening in our sector in Europe is challenging and will continue to be so in the future – and all good and fruitful debates need fuel not consensus given in advance.

We believe that many of the themes of the report will be discussed intensively in the coming years and that many sometimes painful reassessments will be required – including for us who have authored this report.

Our world is transforming and moving fast. The ability to be flexible, to move fast and possess analytic skills are crucial in the future. The study does not claim to offer all the answers and solutions, but rather it aims to formulate the questions and explore them. We believe that many of the themes of the report will be discussed intensively in the coming years and that many sometimes painful reassessments will be required – including for us who have authored this report.

A more extensive and complete description of the background is given in the main report.

The author and the editorial team of the sub report have deep roots in public film funding. The issues raised in this report, especially the future vitality, relevance, necessity, and attractiveness of public film funding – are central to us.

#### AUTHOR:

**Tomas Eskilsson** (Founder of Film i Väst, CEO 1992–2017, Head of Strategy 2018 –; Chairperson Cine Regio, 2021- )

#### EDITORIAL TEAM:

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**Katarina Krave** (CFO, Film i Väst, 1992–2020; Business Affairs, Film i Väst, 2020 –; Business Affairs, SVT, 2021-)

**Bengt Toll** (Head of Business Development, Film i Väst 2003–08; Deputy CEO and CEO Swedish Film Institute, 2008–12; senior consultant 2013– )

A special think tank was created for the study's framework and the interpretation of results. The Think Tank members were: **Charlotte Appelgren** (secretary general, Cine-Regio); **Thomas Gammeltoft** (CEO, True Content Entertainment); **Johanna Koljonen** (Author/Project Manager, Nostradamus/Göteborg Film Festival); and **Per Ström-bäck** (Spokesperson, Swedish Game Industry)

The study will focus on the future legitimacy, urgency, and relevance of public film funding, and specifically on selective public film funding.

The main thesis of the study is that given the changes in the external environment, public film funding must renew its argumentation and alter its offering in order to remain relevant and attractive.

The questions that we invited the interviewees to engage with con-

cern the rationale for, and legitimacy of, public film funding, but also concern broader elements in the ecosystem. Representatives of public film agencies were invited to reflect on their future role, regardless of whether it is motivated primarily by cultural or economic/business policy, or whether they identify as active initiativetakers or passive financiers – in other words, whether they consider themselves as central players for knowledge, expertise, creativity, capital and networks or principally as financiers. In this context, we were seeking responses to questions such as:

- What competences are required for the different roles? What support systems/investment models are needed if relevance and legitimacy for public film funding are to be achieved?

Below are the main questions we asked the interviewees:

- How do you view your own operation/company now, and in 2025?  
How do you view your own role now, and in 2025?
- What contemporary arguments are there as to why film is a public matter in your territory? What future arguments do you think are necessary for film to continue being considered a public matter in your territory? Do you think that the public sector in the short, medium and long term will increase or decrease its funding for film – and why do you think so?
- What role(s) do you think a public film fund might have in the future? Why these roles? What is required for a public film financier to be legitimate and relevant, now and in the future? Why?

In formulating the questions, our starting point was that funding for production, distribution and screening of audiovisual works in Europe is primarily part of cultural policy, both nationally and transnationally. However, funding for the development and production of film/audiovisual works is also often regarded as part of economic policy. A fully developed audiovisual policy combines cultural and economic policy elements – but the focus of this study is on selective film funding, which is more closely associated to cultural policy, but may also include elements of economic policy.

Historically, regional film policy is usually understood as a blend of cultural and economic policy – or, more specifically, as economic policy based on cultural policy.

The work is carried out by each individual region (eg the Nordic region). The Nordic serves as a reference and test area for the study.

The respondent list was discussed and established together with the Think Tank. We interviewed production companies of different sizes and with different focuses (50), distributors/rights management com-

panies (10), cinema owners (10), broadcasters (8), VOD-services (6), international film festivals (2), public film funds (15), others (9).

All respondents are guaranteed anonymity. We will not directly quote specific individuals. Most of the interviews were conducted over Zoom/Teams and lasted for an hour. In some cases, this meant that some relevant questions remained unaddressed. We, however, do not believe that this has influenced the results in any meaningful way, as all key perspectives were touched upon during the discussions.

The response rate has been close to one hundred percent.

In addition, more than 50 dialogue seminars and workshops have been carried out in the Nordics with more than 2,000 participants. The study's topic and questions have been central in these events.

The results are reported in such a way that both the "general" meaning and the scope of the answers are made clear. It should be pointed out that there is broad consensus around how the ecosystem is developing, how the future business models of different operators will be structured, and what function public film funding should primarily serve – both presently and in the future.

The responses of the various parts of the sector are reported in summarized form. This rapport will unavoidably include generalizations. More complex conclusions will be presented in the final report.

### **Understanding the Ecosystem and the "World" – 2025**

The rapid evolutionary change that the film and drama series industry has undergone (hereinafter referred to as the paradigm shift) was possible to forecast mid-2010s. The future development could be foreseen even if it was difficult to predict the speed of this development. This does not mean that all companies involved in producing, "distributing" and exhibition of content were able to grasp the magnitude of what was happening. The old business models were still largely in place as we approached the end of the decade.

During the pandemic the pace of change has accelerated. It has become clear to the vast majority of respondents: production companies, rights acquirers/managers, displayers, broadcasters and public financiers that we will all have to adapt to a new ecosystem. The strategies and tactics of the streaming services have been updated, and the rules governing the struggle for global and regional domination have thus been laid out.

The predictions of different respondent groups, regarding the future of the industry, and the ecosystem up until the year 2025, are presented below.

### **Production/Production Companies – 2025**

Almost all respondents believe in continued expansion in content production up until at least the year 2025. Some believe that the expansion will continue throughout virtually the entire 2020s, but the majority believe in a consolidation – whereby a number of large global and regional streaming services will either merge or cease to exist towards the middle of the decade. This will cause the increasing demand for new content to slow down or flatten. No one interviewed believes that the content production will decrease from 2025 onwards, but that a status quo will eventually be reached.

We are entering into a golden age for creators: directors, screenwriters, and creative producers. The possibilities will be endless. The same can be said about the "industry" as a whole.

The capacity problems have paradoxically become more acute during the pandemic. This may be because content production has continued uninterrupted in large parts of the Nordic region – this particularly applies to Sweden. Many are currently asking how the upcoming volume growth will be managed – where is the capacity? The shortage of producers, line producers and directors are particularly acute. The development described above have resulted in less emphasis on the necessity of production incentives from producers. This attitude might stem from the fact that the larger production companies are receiving an increasing amount of "orders" while a significant repatriation of production processes has taken place.

The number of production companies will decrease, or rather; the number of active production companies will be reduced through acquisitions and mergers.

Companies with fewer employees, a physical office space and poor production continuity have had a difficult time during the latter half of the 2010s. These problems have been exacerbated during the pandemic. Few respondents believe that these types of companies will recover. On the other hand, companies based on a brand (a director with strong international appeal), and very small companies with low overhead costs that can switch between selling their services and producing, are expected to have a fair chance to develop and even grow.

The absolute majority of respondents believe that volume and margin will be the most important things to focus on for most production companies. Ownership will be of great importance for parts of the own company's production, but not for all production undertaken. Most companies have accepted the fact that they in certain projects can operate as a "production service company" even if they initiated the film/series and are unsentimental about this. Companies that can be categorized as larger arthouse companies (producers of commercial



internationally viable arthouse) share the view that the majority of their colleagues will be operating businesses focused on volume and margin, but believe that they themselves will stick to their old "business model" for the foreseeable future. Some say this with the reservation that there are possible exceptions when artistic control is guaranteed, and the price is right.

Opinions differ regarding what stories will be told, and what genres of films will be produced, in the future. On the other hand, most agree that production companies will likely produce "local content" for a significantly greater number of streaming services. Several companies have entered into discussions with Amazon; it is believed that HBO Nordic/Max will increase their orders; Netflix has increased and will continue to substantially increase their orders in the Nordics (especially in Sweden); and it is believed that Disney+/Star are about to launch a production venture in the Nordics (alternative purchase of licensed content). Viaplay and Cmore will at least need to maintain their current volumes in order to compete.

The major global and regional streaming services aim to offer a wide range of content, in terms of genres and themes. The majority of the respondents believe that this range should include broad mainstream content, genre-specific content and niche "products" (arthouse films and series strongly influenced by arthouse film).

There is a basically total consensus around the fact that the cinema window has changed forever and will be less and less significant for the profitability of individual films. A shorter and more flexibly exclusive cinema window is considered more likely to be the norm moving forward. Many see potential in the fast-growing EST/PVOD/TVOD market. Fewer films/significantly fewer films will be produced that are primarily intended for the movie theater.

Many see potential in big "national" films, as the American "middle film" is disappearing from the movie theaters, while others are concerned by the fact that big American studio films are going to be screened exclusively at the movie theater for a shorter period of time than ever. The power of movie theaters will decrease both in terms of dictating the window structure and the ability to unilaterally determine how revenue from the sale of movie theater tickets is distributed.

Only a handful of respondents state that their focus in the future will be "films primarily intended for the movie theater". Opinions regarding which domestic films will belong in movie theaters in the future differ quite significantly. Here is a selection: major national works depicting contemporary and historically important events/traumatic events/people; WORKS by the truly great creators/artists; atmospheric, touching and thematically important films for an older audien-

ce; and children's and family films based on well-known brands and stories; films that tell a story with a theme that is important to a lot of people and that a lot of people can relate to; films that strongly impact a lot of people. Only a handful of respondents believe that films based on well-known brands/IPs are the future for Swedish/Norwegian/Danish/Finnish films intended for the movie theater. In Sweden there is a desire for strong original stories that can rebuild confidence in Swedish.

#### Distributors (rights acquirers/rights developers/rights managers) 2025

The selection within this category is, for obvious reasons, considerably smaller. The answers are ultimately influenced by the general state of the industry. The respondents include: pure "distributors"; and companies that are involved in a combination of production, "distribution", "international sales" and movie theater ownership; companies that are producers and operators in the PVD/EST/TVOD market; and companies that function as producers, "distributors" and "international sales companies".

This category of respondents generally agrees with the general picture presented above:

- Fewer films will be made for movie theaters – this may result in opportunities for national films with real audience potential to perform even better, but some respondents have expressed concerns that are the opposite of those expressed by producers.
- Movie theaters must necessarily change – the cinema experience must be developed.
- The capacity of movie theaters will decrease: there will be fewer movie theaters and perhaps fewer seats.
- The power of movie theaters will diminish.
- There will be fewer production companies that can deliver films intended for cinematic distribution.
- Growth will continue on the streaming market, but most respondents believe that this growth will be slower than the production companies have predicted.
- There is a concern that the changed business models of production companies will affect ambitions and "outcomes".
- The trend towards rapid growth in revenue from EST/PVD/TVOD is predicted to continue.
- The major operators are, to varying degrees, convinced that well-known brands/IPs will be an important part of the future business.

All respondents believe that the cinema window will remain important, but there are significant differences of opinion regarding the importance of this and how much of the revenues that will come from licensing/buy outs of managed rights. Some respondents believe that the current demand for rights/trademarks will persist after the pandemic. This belief partly stems from an analysis of the strategies the major global streaming operators are expected to employ when expanding their range – and how important exclusive new material will be.

A shift is taking place in the industry towards companies viewing themselves as rights acquirers/rights developers and rights managers rather than distributors. The smaller operators continue to view themselves as providers of competence and services that the production companies need to ensure the success of their films.

### **Exhibitors/cinema owners – 2025**

During the pandemic cinema owners have changed their perceptions regarding the efficacy of their business models, their business concepts and how the businesses should be run in order to remain relevant and successful. What was previously a distant threat is now a reality. No respondent believes that the old business model will return. The new world is here to stay.

It should be pointed out that there are subtle differences in the opinions of the cinema owners regarding this. The generalizations below provide an apt picture of the current situation.

Movie theaters will still exist in the future, but the business models of movie theaters will change. In short, the respondents have stated that:

- Movie theaters will lose their position of power with respect to distribution windows and the distribution of revenue generated by the sale of movie theater tickets.
- The exclusive distribution window will be individual and determined on a case by case basis.
- It is reasonable to assume that some films will be released in movie theaters as well as on a streaming service.
- The hope is that the majority of American studios will primarily employ an exclusive distribution window of 30–60 days. Here opinions diverge: some believe that the basic rule for all studios will be to employ a day to date model to strengthen their positions in the streaming war. Others believe that the movie theater will be central to maximizing sales within the TVOD window and to add value to SVOD releases.
- It is believed that it will be easier to agree on a longer distribution

window for films aimed at children and families.

- Studio-affiliated so-called "smaller films" (budgets up to 25 MUSD) will generally not be screened at movie theaters and will instead be available directly via each respective studio's SVOD service.

- The number of films that will have cinema premieres will decrease.
- The movie theaters must be developed and adapted to specific audiences in all aspects (especially in Sweden) to justify a significantly higher ticket price – the movie theatres will have to offer adult audiences an atmospheric experience and/or become blockbuster palaces that offer a fully immersive experience.

- Movie theaters must have multipurpose use.
- The larger operators will run fewer movie theaters. The hope is that other operators or local enthusiasts will keep movie theaters operational in certain locations.

- The seating capacity will be lower.
- Dependence on national films with audience potential will increase.

### **Broadcasters – 2025**

In general, broadcasters are experiencing a similar development as other operators and do not deviate significantly in their responses. See above.

The respondents are mainly focused on the power shifts that are taking place. Publicly funded public service companies (TV4, for example, is considered a public service company, but is not publicly funded) understand that they will no longer be the major commissioner. They basically have two options. One is to become more and more clearly niched towards locally profiled content that "no one else provides", the other is to "sleep with the enemy" in order to maximize their potential reach and success. The second model may result in the loss of exclusive rights in a territory or may result in very limited ownership of rights. There is no uniform and standardized approach to the global OTT services – this applies to both publicly funded public service companies and other operators. On the other hand, it appears to be increasingly common to collaborate with regional streaming services. It's not that black and white, however: some players consider themselves unable to cooperate with broadcasters that aren't linked to the EBU.

There is no long-term guarantee that publicly funded public service companies will be able to finance feature films in the future. And the public service companies that survive will likely be inclined towards supporting the production of niche and unique content.

### **Streaming Services – 2025**

For obvious reasons, the opinions held by streaming services differ radically from other respondents as they are not dependent on public film funding and do not unequivocally consider themselves part of the ecosystem in a specific territory. We have chosen to mainly include the answers provided by the streaming service representatives in the overall text, as the companies in this supply chain will be in a unique position to affect other operators over the next five years.

In essence, the streaming services confirm the views of the other respondents. In some aspects, the answers differ from each other. This, among other things, applies to the perception of whether there is a specific way of telling a story so that it relates to a territory and/or using themes that are clearly derived from a specific geographical area.

### **Festivals – 2025**

The “others” category primarily includes film festivals. The sample of respondents is too small in the Nordic countries. The category “others” will be summarized once all interviews have been conducted in Europe. Based on the few interviews conducted, the following can be concluded:

- The festivals are largely observing the same development as the respondent categories above.
- The development that movie theaters are experiencing is worrying. It will be increasingly important for festivals to own and operate movie theaters/showrooms in the future.
- Festivals will become increasingly important for all the films that are not traditionally distributed through movie theaters – festivals will constitute the primary market for “arthouse films”.
- The festivals will pay owners/creators higher fees for the right to screen films.
- Festivals will increasingly screen films “non-exclusively”, i.e., the individual film may be available via a streaming service in the specific territory in which the festival operates.
- The festivals offer a unique forum for conversations/intellectual conversations about specific films and film in general.

### **Public Film Agencies in General**

The attitude of public film agencies concerning the future (2025) is almost entirely based on the functions they presently have. Questions concerning how the mission statement should account for the new

power structures and the new film industry ecosystem are answered mainly through references to the mission as it is currently defined.

These respondents fail to consider what new skills the industry will require in 2025. However, one respondent clearly states that new skills will need to be acquired and that the way the institution operates will need to change in order to stay relevant.

There is a certain awareness among various agencies that the power of the own institution will diminish.

What the fusion of formats will result in is given little consideration. The majority of agencies still assume that the film industry can be defined as before and that respective agency have a special responsibility for its survival.

### **National Film Institutes – 2025**

The national film institutes are focusing on their current functions (see above). They are justifying their own existence by referring to the traditional arguments and, to an increasing extent, by emphasizing the necessity of upholding "democratic values" (freedom of speech, diversity, equality).

In general, national film institutes are observing the same changes in the world around them as other respondent groups, but they are not particularly focused on how these changes will affect their own organizations. There is less concern about the collapse of the traditional cinema window. In essence, it does not matter in which window or on what platform the content is consumed.

The concept of "platform neutrality" has no clear definition.

It will continue to be important that those seeking support own and control the fundamental rights to content, but this is not particularly emphasized.

Some institutes are championing the importance of the movie theater and of facilitating shared experiences. This is, in turn, linked to audience appeal for logical and obvious reasons.

The national film institutes don't seem to necessarily consider themselves responsible for maintaining a functioning movie theater structure in the future.

The majority of film institutes believe that public funding for films will decrease somewhat until the year 2025 – primarily due to the fact that the value of grants will not be increased.

The majority of film institutes are not particularly invested in the need for production incentives.

### **Regional Film Funds – 2025**

The reflections of Nordic regional film funds are heavily influenced by what they perceive is their mission. In essence, all Nordic regional film funds have similar missions, with one exception: Film i Väst. The objectives are linked to the image of the territory (people, environments/ settings and stories) and to help build the industry. The latter aspect of the mission is most clearly embraced by agencies operating in populated territories with existing infrastructure, often linked to television productions.

In general, the regions are observing the same changes in the world around them as others. It essentially doesn't matter in which window or on which platform the content linked to the territory is consumed. The impact is more important. However, some funds are concerned about the future movie theater structure in their own territory.

It will continue to be important that the production companies that apply for funding own and control the underlying rights to a specific project.

Most regional film agencies believe that the total available public funds for film will decrease by 2025. It is believed that these budget cuts will be modest and will perhaps mainly result in various regional film funds not receiving increased funding. In Norway and Denmark many are hoping that a larger share of national funds will be handled regionally. This is not considered likely to result in more available resources for production of feature film and documentaries – instead the funds will be allocated to drama series production.

The majority of regional film funds believe that the prime responsibility for ensuring artistic quality lies at the national film institutes. This attitude differs radically from the attitude that is prevalent among other respondent categories, who tend to question both the importance of national film institutes and the competence they possess.

Most regional film funds consider drama series to be a central component of the future business – an efficient tool to spread the image of the specific region.

Production incentives will be a central and important part of being able to compete for attractive projects in the future.

### **The responsibilities of the public sector – at present and in the future**

The respondents' opinions concerning the current and future responsibilities of the public sector are presented below. The answers have been divided into two parts; one reflects the views of the non-public respondents; the other the film agencies' thinking.

*National level – non-public respondents*

A very large majority of the respondents refer to traditional cultural policy arguments for public film funding. The need to safeguard language, territorial profile/identity, cultural heritage, artistic quality and films of public interest is consistently emphasized among those who are in favor of public film initiatives. The few respondents who are not in favor of these types of initiatives have similar concerns but believe that there are private suppliers who can fulfill this function.

Issues related to gender, diversity and other horizontal perspectives are mentioned by one or two respondents. Many primarily emphasize the importance of "inclusivity" but believe that the market will adequately handle this on its own. Virtually all major global "players" have mandatory policies regarding inclusion and diversity. The producing part of the "industry" will conform to these.

A small group of respondents refer to film policy linked dimensions of democracy (freedom of expression, diversity, inclusion).

One motive for public film funding that was not included in the questionnaires, but that was mentioned by quite a few respondents is the need to counteract American dominance. This motive is mentioned by both smaller and larger companies in the various respondent categories.

A large majority of respondents argues that the film institutes should focus on fewer areas and objectives. Outside of support for film, only film heritage enjoys significant "support". Some areas of activity can adequately be handled on the local and regional level.

A very large majority emphasize the importance of having film institutes prioritize cinema films. The term "cinema films", in this context, refers to films that are primarily made for the big screen. It is emphasized that other players (streaming services and broadcasters) will likely not safeguard cinema films. If "we" want to safeguard the great shared experiences, the film institutes must clearly prioritize cinema films.

A clear majority of respondent think that film institutes should support a smaller number of films in this pursuit. The support provided to these projects must be considerably larger than it currently is, this to ensure that films are produced that are sufficiently cinematic for the big screen.

There is some support for the idea that film institutes should continue to engage in talent development in the future, but many respondents believe that this work can be better handled by regional film funds and film resource centers. Opinions regarding what "talent development" means and what it should include differ greatly. The validity of providing general support for production of short films is



questioned by quite a few of the respondents.

Almost all respondents believe that productions commissioned by/owned by global streaming platforms should not receive national film support.

A large proportion of respondents believe that national film policy/national film institutes have a special responsibility for ensuring that artistic and creative control is retained within the "home country" and that production companies seeking support own and control the fundamental rights to the content produced.

Most respondents believe that current decision-making models must be renewed, improved, and changed to be better suited to the industry of the future. The critical attitude towards the "filmkonsulent model" that is widespread in Sweden is less pronounced in Norway and Denmark.

Relatively few respondents highlight business policy arguments for film policy. Those that do emphasize the need for contributing to the development and maintenance of a generally healthy, viable film industry with good continuity.

#### *National level – the reflections of the film institutes*

See above. Although it is clearly stated that the starting point for the study is 2025, the respondents find it difficult to detach themselves from their role as it is currently defined.

There are different views regarding what the fundamental mission is. Some feel that public films initiatives are meant to serve everyone. These respondents mean that ensuring a range of content that "reaches and concerns everyone" is core. Other respondents have a more clearly elitist perspective. To support the best works without taking into account which target groups the content reaches and concerns should be the main focus.

#### *Regional level – non-public respondents*

It exists an unsureness about what function regional film funds serve. Reference is made to economic policy starting points such as infrastructure and employment.

Most respondents understand the need for regional film initiatives as part of geographically diversifying the films that the nation produces.

Some respondents call for standardized regional requirements, i.e., ensuring that various regional film funds basically operate in accordance with the same regulations.

Many also view talent development as central to the mission of the regional film funds. It is important to understand that most respon-

dents call for radically different methods of talent development than those that are employed today. Emphasis is placed on things like innovation, the production of drama series pilots, various forms of prototype production and mentoring programs. The traditional focus on supporting production of short and documentary films is viewed as outdated by the majority of respondents. There should be opportunities for working with global streaming platforms on talent development.

A small number of respondents believe that it is necessary for the regions to take responsibility for following up on, and supporting, their filmmakers. In some cases, supporting odd artistic talent in the own territory is pointed out as particularly important.

The majority of the respondents also think it is important that the regions prioritize cinema films.

#### *Regional level – internal reflections*

In many ways, the Nordic regional film funds' own reflections are confined to their own territory and to the function they think they will continue to serve far beyond 2025.

The mission is almost always strongly connected to one's own territory and the image of this territory. This also applies to funds who work with a combination of public funds and venture capital. How important it is considered to be to have a regional economic impact varies between regional film funds. For some, conveying the image of the people, environments and stories of a territory seems to be far more important than building industry and infrastructure.

Supporting tourism and the hospitality industry is a central objective of some of the Nordic regional film initiatives.

The regions are not particularly focused on the artistic quality and commercial audience potential of the projects they support/invest in. Other interests are more central to their operations. We could refer to these interests as intraregional considerations. The systems in place in Denmark and Norway are intrinsically contradictory since relatively significant support is provided by the state. This support is provided on certain conditions. DFI and NFI are supervisory authorities. The state funds must contribute to achieving the national film policy objectives.

Virtually no respondents anticipate their functions to change significantly before the year 2025. Some express a strong desire to increase the number of drama series productions in their own territory. These individuals look to the state rather than the regions to be the driving force behind such an initiative.

### **Opinions of Public film agencies**

In summary, both regional and national public film agencies are subject to general and extensive criticism. This criticism has two clear focal points. One concerns a lack of knowledge regarding what elements the ecosystem consists of and how it really works. Some are concerned that this shortcoming will become even more obvious and problematic in the future. The second concerns a lack of dialogue. This does not refer to project-specific dialogue but to communication between parties and operators. The latter concern is widespread but is especially prevalent among major players.

In general, public film operators are considered to be less relevant and more poorly equipped for the future than they used to be.

### *National Film Institutes*

To the two focal points mentioned above, a third can be added. Working for a public national film agency is not as prestigious as it used to be and this type of employment risks becoming less and less attractive in the near future. This is in partly due to the fact that the world has become richer in opportunities for those who possess solid knowledge and attractive skills. Working for an organization that is obviously losing power and influence is not particularly attractive. The fact that national film institutes are not keeping up with wage developments in the sector is not helping the situation either. Considering the fact that an increase in content production and volume – and a strong wage development – is expected over at least the coming five years, and as the majority of respondents consider a lack of accurate knowledge of the eco-system to be a key issue, this could turn out to be a fatal problem that risks undermining general confidence in national public film agencies.

Most respondents want leaner, but significantly more competent, organizations.

Film institutes are being widely criticized for not prioritizing the key issues and instead focusing on less relevant tasks.

Most respondents think that the film institutes' interpretation of the concept of "platform neutrality" is problematic and difficult to embrace. What is meant by this? To a large extent, the support provided is not perceived as platform neutral. In this context there is an expressed desire for greater clarity and rigor.

### *Regional film funds*

Regional film funds' biggest problem in the eyes of the outside world is the perceived lack of relevant competence. This is a practically constantly recurring point of contention that is not about the incapa-

bility of single individuals in each "organization" to understand and interpret the world in which we all operate. It is an assessment of the general level of competence in the structures one encounters.

Regional film funds receive a higher approval rating from the respondents, perhaps because they actually play a rather marginal role in a wider context.

The majority of respondents believe that regional film funds will be better off than the national film institutes – regardless of whether the imagined challenges facing these organizations have to do with political changes or budget constraints. It is considered easier to justify the existence of regional film funds than national institutes.

## Conclusions

Below are some of our general conclusions based on the respondents' answers.

There is a wide-ranging consensus regarding what elements the film industry ecosystem (a broad concept) consists of and regarding how this ecosystem will develop until the year 2025. The volume increase in content production will continue over the next few years (at least until the year 2025). Streaming will be the most important and central method of consumption. The window model, as we knew it, is dead. The movie theaters' power over, and central importance for, feature films, is steadily declining. Various players involved in production, disseminating and distribution are merging and will continue to converge. But what's perhaps most important is that power is shifting within the industry. Global (American-owned) tech and content companies will be central to content production in our respective languages from now on and for the rest of the 2020s. Regional streaming platforms must follow suit if they want to remain competitive. Public film financiers will be crucial to guaranteeing the production of cinema films in the languages of their respective countries, that are characterized by their respective countries' "temperament" – this applies to both ambitious artistic films and films intended to reach and concern a larger audience. Public film financiers should and can play a role in ensuring that the artistic and creative control over specific films stays in the territory.

Almost all respondents fear that there will be less money available in the post-pandemic public systems. The vast majority of respondents conclude from this that the public sector must be given a clearer, more specific function. If the public sector is to have a productive role to play public films financiers will have to be pickier about which projects to support and will have to invest more money into fewer films.

Fragmented financing models are already becoming less attractive and will continue to lose relevance as we progress towards the year 2025. It will become more common to start a financing process with the help of contacts or streaming services than with the help of any of the "usual suspects". This will restrict public film financiers and necessarily speed up the preparatory and decision-making processes. If the public sector sees it as important to safeguard shared film experiences and encourage lively conversations about their own territories' films, they will have to work closely with other possible financiers, both public and private. Together, they must ensure that producing companies, creators and other key people can operate in a predictable environment. Film institutes, major regional film funds, traditional broadcasters and key acquirers/managers/developers must tear down their ivory towers and meet in cafes and bars to find common ground – this way, we can ensure that both ambitious artistic films and films with wider public appeal continue to be produced and screened at movie theaters.