

**THINKTANK
ON EUROPEAN FILM
AND FILM POLICY
THE
COPENHAGEN
REPORT**

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The ThinkTank: a summary

INTRODUCTION

When you stop and think, there are three possible ways of looking at European film.

In one way, it does not exist: in every European country, the films made in that country are in second place - often in very poor second place - to films from Hollywood. Films from other European countries tend to be almost absent.

In another way, it is like other contemporary art, enjoyed by the narrow segment of the population which appreciates it much as they might appreciate other countries' literature or cuisine.

A third way is that European film corresponds to the vision of an essential dialogue between the peoples of Europe, the main place where they meet and get to know about each other and themselves.

The ThinkTank on European Film and Film Policy is about this third way, about making a difference in people's lives, about justifying the two billion euros or so of public money that each year makes film in Europe possible.

This document is the record of the Copenhagen ThinkTank that took place in June 2006.

It is also the prospectus of for the ThinkTank going forward.

The ThinkTank was born in the summer of 2005. Working with an advisory team the inaugural three-day event was organised. Between 21 – 23 June 2006, 170 people attended, representing the film industry, funding bodies and national governments in 34 countries. Keynote speeches were given by Lord David Puttnam and Geoff Gilmore. Participants took part in working groups to consider the objectives of funding film and how these could best be achieved.

The process has begun to establish a permanent organisation to take forward the work of the ThinkTank. The Danish Government has committed core funding, and discussions with potential partners – national and regional film funds as well as other institutions dedicated to film and to the development of public policy – are under way. In the course of 2007, we will be putting in place the work programme

of the ThinkTank. First and foremost stands a series of events to advance the debates about access to film and the positive impact of film in society, and how to maximise the effectiveness of public film policy. The work includes setting up research and publication activities, and generally assisting in the development of the knowledge, skills and ideas we need to strengthen film-making. Consistent with ThinkTank philosophy, *The Copenhagen Report* is a discussion document. It poses questions, it throws down challenges and it invites argument.

The response to the Copenhagen event has been very positive and there has been great encouragement for us to continue what we have started. People keep asking when the next meeting of the ThinkTank will be. Our thinking is that we could, of course, do another meeting with lots of new people and some of the same people, and we could have the same discussions over again without advancing anything very much. Any ThinkTank activity must at its core aim at change.

We are therefore thinking about how best to address the key issues and how to involve different countries and a variety of people from all areas of the film industry: the creators, producers, distributors, festival organisers, scholars, public administrators and policy-makers, not necessarily all from the film world. The obstacle we face is that we want everyone to take part, and not just people from the 27 EU countries, but gathering all those people in the same place at the same time and ensuring that there is the opportunity for real dialogue would demand a much bigger space and more time than anyone can realistically afford. Moreover, in Copenhagen we made an uncomfortable discovery: people are not ready yet to have the discussions they would like. They do not have the information, the relevant intelligence – especially the intelligence to enable them to compare and understand what is common and what is distinctive about their industries, their markets and their cultures – to make sense of what is and is not working, what is necessary and useful. Without this intelligence, the film industry cannot thrive and public policy for film will miss the mark. We need a much greater understanding of what our common goals and differences are. The current debate is fractured and people who should be taking part in the debate – notably the creators – are mostly absent.

In 2007 the ThinkTank will begin to address these challenges. We need to secure the commitment and the support of the organisations and the people, of governments, film agencies and industry. We need to conceive and refine our ways of working. Can we, for example, help convene discussions that draw on a sufficient breadth and depth of experience and perspective, while remaining focused enough to permit practical, constructive thinking? What is the appropriate focus? Can we base the discussion on a particular country or a limited number of countries? Can we start from a specific problem? We have in mind, perhaps, discussions involving 10 countries, brought together because they share problems rather than because they are in a particular region.

As we seek solutions that are manageable, it is important that we stick to the original aim of the ThinkTank. This is how we have summarised that aim:

“The overall aim of the initiative is to assure the conditions for filmmaking, to create a space in which the films can work, and to realise the value to society of cinema. This involves

- *filmmakers better harnessing the opportunities for matching artistic endeavour with attractiveness to audiences*
- *film-funders taking greater responsibility for their creative, commercial and political decisions*
- *film-funders developing a strategic approach to their work which matches the resources at their disposal with the objectives they are pursuing.*
- *producers and industry organisations optimising the effectiveness and cohesion of the industrial framework.*

One basic assumption is that we need to work towards improving the different systems for supporting film, rather than towards one ‘best system’.”

We want to respond to the challenges David Puttnam and Geoff Gilmore posed in Copenhagen. They both considered the sources of success, and failure, of European cinema: its ability to connect with audiences and to address the issues that really matter, and its willingness to “speak the truth to power,” to re-ignite its “moral purpose”. Lord Puttnam wondered whether “we in Europe have lost our

vision”, whether “we have been so obsessively focussed on getting films made and, in particular, finding the money to get the films made, that we have neglected our sense of what kind of European cinema – or cinemas – we actually want.” Gilmore spoke of the need for renewal if film is to continue to reach its audience in the face of the economic and technological upheavals currently taking place in the market place. He proposed that our “sense of film culture, which is such an important part of film art in what exists in Europe, is also one of the anchors holding back the revitalisation that Europe so desperately needs. Because there needs to be a break. There needs to be a separation from the past.” European film “centres itself in a film culture that is not relevant anymore.”

The ThinkTank wants to get to grips with the realities of our industry rather than to perpetuate the illusions that often function as the basis of our rhetoric and the policies pursued. To prepare the Copenhagen event, we carried out a survey of the national film funds in 29 European countries. This survey revealed how in all but one case, the main funding objectives were to secure national film production and the production of quality films. More than three-quarters of the funds cited the objective to support the building of a sustainable film industry. Half invoked the objective of stimulating employment and commercial activity. However, in response to the question of how they evaluated success, the funds put most weight not on the level of audience response, not on whether the films made money, not on whether the films were distributed to other countries, but on festival selections and awards.

Other research prepared for the Copenhagen ThinkTank considered the extent to which co-producing films made it easier for the films to travel. This research, based on a sample of 344 European films selected for Berlin, Cannes, Toronto and Venice, suggests that co-productions fare no better – and probably fare worse – in the market place than single-country productions. For example, in the sample, of 21 French films distributed in Germany, three were Franco-German co-productions. Of 11 German films distributed in France, none were Franco-German co-productions. The 344-film sample covered the period 2001-2005; over the five years there were 45 official Franco-German co-productions.

In its first year, the ThinkTank took only tentative steps to contribute to the collection and analysis of data about European film. But it has already become very clear that we do not make good use of the data we have and the data we have are inadequate. This point is driven home in the paper prepared for the Copenhagen ThinkTank by André Lange of the European Audiovisual Observatory.

The ThinkTank is also about highlighting the need for high-level research. The European Audiovisual Observatory can only be as helpful as the national data it receives. The Observatory needs, the industry needs, and national film agencies need for there to be consistency and comprehensiveness in our information. How can we be sensible when, for example, we know so little about DVD markets?

In the planning for the ThinkTank, we have decided that we want to reflect on how systems can be developed in countries that have still to put film policies in place. We want to formulate solid arguments that justify public funding of film and explain why and how we protect and promote film. We need to get beyond the discussion that we tend to hear from producers about the need for more money and faster and easier access to funds. Instead we want to concentrate on what is important to society and important to film culture because this has tended to be the weakness in the argument for film.

At the core of ThinkTank thinking is that we do not only want to discuss funding but rather what films we make, how we make them and why we make them. It is a discussion that needs to involve creative people more – we have always known this and understand it is not easy to achieve. It is not just a question of inviting lots of writers and directors; we need to identify a range of people who can contextualise and generalise their experience.

When we began the work to set up the ThinkTank in July 2005, we did not know if it would fly. We now think that it can fly and we are realising how important it is. The ThinkTank is an opportunity to take more responsibility for developing policy: some people think that it is up to Brussels to decide what we should and should not do. But we need to talk about what we make and national film agencies must work with industry to find more use-

ful ways forward. Together we can take control of the discussion.

The current opportunity arises from the four-year agreement for film funding we have just reached in Denmark. The ThinkTank has been identified as a priority. At the start, the Danish Film Institute could initiate and drive the ThinkTank on its own, but future action will depend on support from the other national agencies, foundations and industry. It will be easier to identify funding for events than for the everyday and preparatory work. The Institute is happy to provide the framework for the ThinkTank but this is not about the Danish view of the world; the ThinkTank has to be genuinely international and of benefit to us all.

The ThinkTank is a new way of strengthening contributions to the formation of European film policy itself. As with society as a whole, film is subject to the fundamental technological, economic and social shifts associated with globalisation. Maintaining and adapting Europe's social and cultural values means that European film policy needs to continue to evolve. For European films to prosper there need to be rich and diverse film cultures which are receptive to films from other countries. European film-makers need to strengthen their ability to reach and connect with audiences.

To maintain public, political and economic support for film – without which there would be no film industry – film culture has to deliver more effectively in more areas that the public considers important. A film policy purely based on the twin pillars of national culture and economic competitiveness lacks in ambition. Increasingly questions such as how different cultures and countries can respect one another, how to achieve social cohesion and prevent communities – inside and outside a given country – becoming alienated and antagonistic, must be addressed. Film's ability to contribute to dealing with these questions may ultimately be as significant as its contribution to the national culture and economy.

The Copenhagen Report has six parts.

This **first part** consists of a document prepared by Gabrielle Guallar formerly of Kern European Affairs in Brussels

and now at the Centre National de la Cinématographie in Paris; it sets out her reflections on the ThinkTank and the Copenhagen event and serves as a guide to the Report. It is followed by a summary of the **next steps** being taken to establish the ThinkTank as a permanent organisation.

The **second part** pulls together the documents prepared in advance of the Copenhagen event and given to participants. The **Background** describes what we are seeking to do and why and how the Copenhagen event was structured. The **Working Groups** details who led the groups, the topics and the questions each working group addressed. The **Rules of Engagement** were those agreed with the Advisory to give participants the confidence to be open, critical and to think 'outside the box.' The **Programme** details how the work in Copenhagen was organised.

The **third part** gives a flavour of the discussions that took place in Copenhagen, beginning with the **keynote speeches** delivered by **Lord David Puttnam** and **Geoff Gilmore**: these speeches were intended to inspire the debate and to set out challenges for the ThinkTank to embrace. The working papers were prepared by the working group leaders for their groups.

The **fourth part** consists of the four **information notes** and an analysis of how films from France, Germany, Italy, Spain and the UK fared in each of the four other national markets. This analysis, like that in Information notes 2 to 4, is based on a database prepared for the ThinkTank of European films in official selection in Berlin, Cannes and Venice festivals between 2001 and 2005, plus European films selected for Toronto in 2004 and 2005. Altogether, this represents 344 titles. The assumption is that these are the outstanding European films produced in the period (there would have been some 8,000 films produced in Europe in those five years). Indeed, there will have been relatively few European films that travelled outside of their home territories that did not get shown at one or other of the major festivals. The purpose of these notes was double: to give participants some interesting data about the performance of films, production companies, sales agents and national support systems, and to illustrate the kind of data that are available and which we might want to use to support our discussions.

The **fifth part** is devoted to the survey of national funding systems carried out by the ThinkTank thanks to the active support and participation of the national film agencies in 28 European countries: the (then) 25 European Union member states, along with Iceland, Norway and Switzerland. The questionnaire that was used is provided in full along with the analysis of responses prepared for Copenhagen.

The Report concludes with details of the 170 people who took part in the Copenhagen event.

*Henning Camre,
CEO, Danish Film Institute and President,
Copenhagen ThinkTank*

The ThinkTank: a summary

REFLECTIONS ON THE COPENHAGEN THINKTANK

The ThinkTank commissioned Gabrielle Gualar of Kern European Associates to set down her reflections on Copenhagen.

The ThinkTank on European Film and Film Policy was organised by the Danish Film Institute in order to bring industry and public funding bodies together to consider effective strategies for the strengthening and reinvigorating of film in Europe.

It took place in Copenhagen on 21-24 June 2006 and gathered 170 decision-makers and industry representatives, originating from Australia, Austria, Belgium, Bulgaria, Canada, Cyprus, the Czech Republic, Denmark, Estonia, Finland, France, Germany, Hungary, Iceland, Ireland, Israel, Italy, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Norway, Poland, Portugal, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Turkey and the US.

Three questions

... Why European Film? Why European Film Policy?

In his keynote, Lord David Puttnam called for “exploding European cinema” – creating a big-bang of European film and film policy. Of course, there is not a single European cinema but rather a variety of European film cultures, languages, administrative structures, histories and policies. But across Europe, cinema **faces common challenges**:

- Very few European films reach a wide enough audience to generate sufficient revenues to make the industry self-sustaining. Such trends continue to this day, at a time when the amount of public funding is less readily available. Annually, over 700 films are produced in Europe. The majority are highly dependent on public funds. Producers, distributors and exhibitors of European films rely on subsidies to fill the growing gap between the costs of making (and making available) the films and the revenues they generate. For many producers, accessing public support has become their main role, more important than creative or organisational input.
- This trend has progressively converted the mission of public funding bodies to enabling production, with only a small role in encouraging quality and good story-telling.
- Convergence and the information and communication technologies (ICT) revolution are challenging existing film policies. The choice is clear: either film policies are updated in order to harness the digital challenge or Europe’s film cultures will be left even further behind.

The benefits of working on a Europe-wide basis include:

- Learning from experiences in other countries and sharing successful strategies
- Developing more robust arguments to justify public funding for cinema
- Going forward, to create a compelling vision for European cinema.

... Why a ThinkTank?

*"I hope you understood this was not a conference".
Henning Camre, Director of the Danish Film Institute, 24
June 2006.*

Several conferences were convened over the last decade and a half to reflect upon public support to European cinema, starting with the Audiovisual Assises in Paris in 1989 and including the 1993 Brussels conference and the 2001 Subsidy on Trial at the European Film College.

But the Copenhagen ThinkTank was not a conference. The ambition of its organisers has been to set a **new standard** for dialogue and common action. The key elements are the variety of stakeholders involved, from industry, public funding bodies and beyond, and the will to finding ways to bring them together for fruitful and result-oriented discussions.

Consequently the ThinkTank's objectives are:

- To test an innovative way of addressing European film policy – setting up a new kind of dialogue
 - Who needs to be involved in developing European film and film policy?
 - How can this debate best take place?
- To consider effective strategies for strengthening and reinvigorating European film
 - Why and how are public funds used to support European film and how could it be supported more effectively?
 - Do public policies' objectives need to be refined? Why? How?
 - Do European countries need new models of intervention? To what extent are such models "transferable" from one national context to another? What can we learn from each other?
 - How can filmmakers both improve both the artistic quality of film and prosper in the market place?
 - How can the whole "film community" (filmmakers, producers, distributors, exhibitors, educators,

and other film practitioners) become involved in reshaping European cinema and film policy to ensure that Europe gets and gets to see successful films?

- How can the new methods of delivering video be harnessed for the benefit of European cinema?

The ThinkTank was launched as a **process**, requiring an on-going interaction between stakeholders. A participant said she wished for a Socratic way of addressing European cinema policy: an interactive process of clear and bold questions & answers in order to find the best possible ways of addressing European film policy.

... Why a Blueprint?

"Spread the word!!"

Louise Vesth, a young Danish producer, speaking at the Copenhagen ThinkTank's closing session.

The ThinkTank constitutes a perfectible model which has now been tested.

Going forward, it needs to be further **examined** and **refined** with a view to be **continued** and **replicated**.

Additionally there is the idea that ThinkTank should not only take place at national and regional levels but also beyond Europe because national cinemas throughout the world are confronted with the same challenges: how to exist in a globalised "entertainment" market.

Hence the present Blueprint, which aims at presenting and reflecting upon the ThinkTank experience, to initiate a process of policy development.

In section one the Blueprint presents the ThinkTank method and reflects upon the Copenhagen experience and considers:

- **Who** needs to be brought in to enrich the dialogue and make sure it is challenging?
- What is the **organisation** that most helps a common vision to emerge?

In section two the Blueprint presents the **proposed topics** for a European film policy agenda, as they emerged from the ThinkTank experience.

An innovative way of addressing European film policy

Who needs to be involved in developing European film and film policy and how can this debate best take place?

**Fostering a challenging dialogue:
Who needs to be involved?**

The Copenhagen ThinkTank gathered a diverse group of participants – representatives from national & regional film agencies, industry experts & consultants as well as journalists.

- **Conflicting interests** arose amongst public funding bodies on the one hand and producers on the other hand. This was particularly the case in relation to the issue of "territorialisation" clauses. These were presented by producers as a barrier to many production projects, whereas film agencies present them as a condition for keeping budgetary authorities interested in financing cinema (thereby subsidising local economic activity). Another sequence, where the industry representatives would meet first and then submit proposals to agencies for a common discussion, could be envisaged.
Issue 1: How can the dialogue between film agencies and producers be improved?
- Producers had opposing standpoints in relation to the **issue of the number of films** produced annually in Europe. Some were clearly in favour of drastically reducing the volume. Others insisted on the need to keep on producing a variety of films as a way of maintaining cultural diversity and allowing new talents to be discovered.
Issue 2: Who are the stakeholders who should be taking part in order to ensure that this debate becomes more fruitful?
- **Artists** claimed they had not been given enough attention and that this failure was detrimental to the debate because artists approach the issue of European cinema's "performance" from a different perspective than producers. Whereas producers tend to focus on financial and management issues, artists focus on the framework of a story, and more generally how to bring their ideas to life.

Issue 3: How can film policy debate be re-oriented to address the questions of what films we want and how to get them?

- The **European Commission** had only had one representative present – from the Competition Directorate General (DG). The European Commission addresses film from a wide number of perspectives through many other DGs and policies (such as copyright and piracy issues, technology issues, training, the circulation of films across Europe, content regulation, film heritage and media literacy) as well as through different support programmes (including MEDIA, IST, i2010 and the Structural Funds). Issue 4: How can we best engage with the European Commission?

- Some regretted the absence of **Film School** representatives, whereas the issue of training was recurrent in the debates.

Issue 5: How should film schools be brought into the debate?

- Issue 6: It could also be argued that the ThinkTank would benefit from the contributions of **other stakeholders** such as **technology** representatives as well as representatives from the **banking and financial sectors**, not to mention from **other cultural sectors** and **social activists**.

- The **large countries** were not as well-represented in the discussion as many of the smaller ones. The large countries were criticised for not having participated enough even though their policies and the subsidies they grant set the tone for Europe as a whole.

Issue 7: How can the larger countries become more engaged in the ThinkTank?

The challenges emerging from the Copenhagen ThinkTank in relation to the scope of its participants (Who?) are the following:

- How can the ThinkTank be efficient and produce clear ideas while at the same time reflecting the variety of profiles and interests at stake when discussing European film policy?
- If the ThinkTank is not to be just a dialogue between producers and film agencies, which other categories of stakeholders can it extend its reach to?

In this respect, a list of potential contributors for the future could include:

- Talent/film directors/writers
- Producers
- Distributors
- Exhibitors
- Broadcasters and other platform operators and service providers
- Financiers
- Public bodies (national and regional film agencies)
- International bodies and authorities (European Commission, Council of Europe and the European Audiovisual Observatory)
- Political representatives
- Trade journalists
- Consultants/Advisers
- Film schools/students
- Universities and scholars
- Archives
- Other cultural sectors, including architecture, advertising, fashion, theatre, music
- Social activists (people and organisations seeking to make society better)

Proposed topics for a European film policy agenda

On the basis of the outcomes of Copenhagen ThinkTank, what are the elements for taking forward film policy discussion in Europe?

Tasks for the film agencies

The bottom line is getting film agencies to:

- Map out and re-think their objectives
- Improve market intelligence i.e. making available high-quality research and quantitative data
- Improve their processes for selecting the projects they support and for managing that support
- Share more with the film-makers the responsibility for the success of the films they support
- Think digital, in relation to both the design and implementation of film support schemes.

We first set out the basis of public intervention in film and then summarise the key propositions which emerged from the working groups.

Justification for public action

One of the Copenhagen ThinkTank objectives was to rethink public policy objectives.

Of primary importance are the general objectives of public intervention.

At a time when the public purse is under ever greater scrutiny, it is wise to look at the reasons for supporting culture – besides the “art for art’s sake” arguments.

The “public value” proposition, put forward by Professor Mark Moore of the Kennedy School of Government at Harvard, provides the basis for an exercise to identify the multiple social, economic and political benefits of film both to individuals and the community.

Professor Moore sets out the view that whereas the management of the private sector is aiming at creating value for its shareholders and employees, the managerial goals of a public sector organisation or of publicly-funded activities are less evident. In the public sector or the publicly-supported sector, the aim is to create “public value”, which is not endorsed by consumers or shareholders, as in the case of the private sector, but by citizens.

In the case of the film sector, a reflection in terms of public value requires identifying the various elements of public value created for:

- Citizens as individuals,
- The community of citizens (society and political life),
- The economy.

In the film sector, public value might for instance include:

- European films = a **symbolic** value, expressing part of the European and national heritage.
- Access to film culture = **democratic empowerment**. Cultural development is one of the conditions enabling an effective practice of democracy. Any cultural policy should aim at ensuring that every individual gets a concrete and equal access to culture, thereby acquiring the opportunity to develop his/her political conscience.

- Access to culture = **education**. Culture can act as a mind-opener. The different cultures embodied in the diversity of films acts as an incentive to discover other realities and perspectives, contributing to inter-cultural dialogue, and encouraging tolerance.
- Participation and access to film culture = reinforcement of **identity building** and a sense of belonging at national and European levels. At a time when the European integration process is questioned by many citizens, it is worth recalling that “*one does not fall in love with the single market*” (Jacques Delors) and that, where it is desired, the power of film culture to build a common sense of belonging and destiny, is notable.
- Public intervention is also legitimised as a contribution to **expected economic progress**, and can be envisaged as an investment.

The film sector is part of “creative industries”. These are expected to play an increasing role in European economies, growth, and employment. They have become a factor of economic progress, in line with labour, capital and technological factors.

The film community needs to further develop its thinking in terms of “public value” to demonstrate how supporting film is about more than enabling civil servants and producers to enjoy a nice life style.

An “eye opener”: European film agencies looking for a vision

From within each working group the conclusion emerged that film policies need to take note of major structural changes affecting the consumption of – and the resources for creating – film, and to rethink the operational tools as well as the objectives.

The following list is not exhaustive but reflects the debates that took place during the Copenhagen ThinkTank.

Harnessing the digital shift

Today one of the key drivers of change is the roll-out of digital technologies.

The era of telling the viewers when they can watch a film is coming to an end. The challenge is how to capture the audience. New forms of media consumption impose a re-thinking of the delivery of films.

Digital technology is radically transforming the production and circulation of content, leading to new applications and offerings.

In relation to Video-On-Demand (VOD), Europe is potentially well-positioned in terms of infrastructure and platform operators. There is a question whether European rightholders are as well-positioned, and whether film agencies will be able to assist the films they support to reach their audiences.

To achieve this transition, creators will be required to develop new skills and new ways of managing their activities. In particular, the following actions are required by public bodies:

- **Training** to support the introduction of new technologies, improving life-long learning and updating skills
- Assist small and medium enterprises (SMEs) – that constitute the bulk of the European film sector – to adapt and grow stronger as they get to grips with **digitisation** and **rights management**



»We should talk about the *cinemas* of Europe – not a single European cinema – in all its diversity, with the universal values we find inside each of us, which is precisely to recognise how different we all are.«

Véronique Cayla

Director-general, CNC, France



»It would be fantastic to be in a position where the European film industry could think about conquering America but, first of all, the European film industry needs to think about conquering Europe.«

John Woodward

UK Film Council, CEO

- Modernise **support frameworks** to respond to the challenges of the digital world. Support in cinema is still focused on the traditional business models. For example, films are increasingly difficult to pre-finance and traditional exploitation windows – theatrical, home video, pay-TV and free-TV – may be difficult to sustain
- Supporting the **testing and development of business models** adapted to the constraints and opportunities of the European market (with its various and localised markets due to language and culture).

The long tail theory

In October 2004, Chris Anderson presented in Wired Magazine the “long tail theory”.

With the Internet, inventory, storage and distribution costs become less significant. Therefore, it becomes economically viable to sell less popular products. Figures were published by Chris Anderson showing that in aggregation, those products sell more than the “mainstream”.

This should enable the emergence of a more sophisticated economic model for the entertainment industries – one in which the long shelf life products are allowed to take their natural course, making small but ongoing sales. This suits Internet sales because operators are no longer constrained by shelf space. In turn, this improves consumer choice and addresses the poor supply and demand matching. The theory is that this makes “popularity”, in the traditional sense, an artefact.

For Chris Anderson, this could be the end of the hit driven economics where “popularity” is often driven by high marketing expenditures and therefore typically only available to the major players.

The long tails re-establishes the concept of “word of the mouth” and viral recommendation.

Towards a sustainable and creative industry

The European film sector is fragmented and unstable. The structural difficulties of the film industry (under-sized companies, limited access to finance, issue of the variety of languages and cultures, territorialisation of rights, etc.) are common to the all parts of the value chain with the exception of broadcasting.

With regards to reinforcing the sustainability of European film companies, the following issues were raised within the different working groups:

Is there an optimal model of the European film company?

There is no “optimal European company model” but the relationship with talent and good management techniques are factors all film companies have in common.

In relation to good management practices, the key issues identified by the Copenhagen ThinkTank were:

- Cash in/Cash out i.e. understanding the relationship of income to expenditure.
- Establish good practice relationships within the distribution chain in order to make sure that the potential revenues of the film is understood and that the cost of the film will be consistent with its potential revenues.

There is no direct link between the size of a company and its sustainability and success. Good business practices are not related to the size of a company. Some argue that smaller companies are better at dealing with new talent. From an efficiency point of view, however, a certain scale is required to assure a sufficient level of content is produced/distributed/shown to mitigate the risks involved.

Public policy should think about how to encourage the creation of successful companies. One practice suggested would be to encourage larger companies to become “umbrellas” for smaller companies.

Realising the value of the rights

So many European films, once finished, are under-exploited. Creators and the public bodies that back them need to ensure the value of the films is realised.

- It will help to raise financing for both the company and the projects in an environment where public funding is scarce.
- It will help establish the links with the banks and financial institutions that will look at the company's revenue flows when they are deciding to make a loan or guarantee. Financial tools must be adapted to the peculiarities of the film sector and investments in intangible assets must be improved.

In the long term, libraries of rights are one of the conditions of the sustainability of companies, determining their capacity to attract investment to guarantee a continuity of cash and to make growth possible.

Better training for reinforcing talents and performance

- Film Schools are a fundamental part in the chain
- Investment in training people is crucial to the health of the film industry. Special mention was made of the Danish system as a good way to feed talent into the industry.

A major shift was identified over the issue of how the investment should be put into training (especially into initial training) towards support for efforts that would either link training to the industry or identify original talent.

Concern emerged in relation to the emphasis placed in some schools on the notion of "auteur", although the approach had its defenders. The point made was that filmmakers in Europe had to regain their passion for making movies as opposed to satisfying a more bureaucratic approach.

What is "success"?

To what extent is commercial success a good indicator of the industry's performance and sustainability?

A discussion took place within Working Group 3 on defining "success" for European film". In this context it was stressed that the issue of what a successful movie is remains unclear.

One perception regarding directors/producers was that too many opportunities were given in Europe to those who were systematically not achieving success. Box office results and cinema attendance are still the best measure of success – it means that the film has found a public audience and has responded to a market demand.

However, it was also stressed that:

- Using the box office as the only and sole indicator was misleading, "Critical success" may compensate for insufficient box office results, since it serves to brand a company or a director.
- Making a diverse selection of films available to the public was perceived as a success – in some cases, the fact that a film was able to expose a language or culture was in itself considered a success.

Public bodies as creative partners

Creativity emerges at the crossroads of artistic creation, technological innovation, education, partnerships between businesses and society.

Creativity cannot emerge in the traditional top-down relationship between film agencies and film-makers. Neither can it blossom in a system where the different stakeholders – film agencies, the industry, film schools and the public – are not connected.

ThinkTank paved the way that allowed a dialogue on these intersections to develop. As a result, the following suggestions have been made:

- Looking at the many ways in which the Heads of Public film funds are appointed and the terms of their employment, decision-makers should have a background in film (education, experience and training) since the impact they have on the shape of companies in Europe is crucial.
- Film agencies should be encouraged to nurture long term relationships with film companies and talent.
- Interaction between the various stakeholders: producers, filmmakers, film agencies, bank & financial institutions, film schools, technology people, and so on should be developed.
- To consider whether the film funding activity should, under certain conditions of transparency, control and public service, be based on different legal forms or innovative forms of public-private partnership.
- Public funding bodies should develop tools to track, monitor and analyse film performances to help identify:
 - What people want (audience research)
 - What the emerging trends are (in order to help create local brands)
 - Export potential
 - Digital opportunities (e.g. helping to identify and quantify new revenue streams – VOD, straight to video/DVD, etc).



»Too many films are made, without due regard for the audiences, the availability of screens, or the general future of the baby.«

Gudie Lawaetz

Managing Director, Farringdon Films, UK

The ThinkTank: a summary

THE THINKTANK – NEXT STEPS

Following the decision of the Danish government in December 2006 to make the ThinkTank a funding priority and to commit core-funding to help establish the ThinkTank as a permanent organisation, and in the wake of the Copenhagen event, we are now in a position to plan how to take forward our work.

Reaching out

For film policy to be developed and implemented effectively, one of the principal challenges is to bring into the debate a broader range of stakeholders. The experience of the Copenhagen ThinkTank causes us to focus on:

- How to involve directors and writers and other creatives
- How to involve industry people alongside producers; this includes the film heritage dimension, the critics, educationalists and all those responsible for promoting film culture and building the audience
- How to draw in people from other industries and sectors of the creative industries (e.g. from advertising, architecture, music, publishing)
- How to build the dialogue between film and the rest of the cultural sector – other arts, museums and libraries etc.
- How to make sure that people interested in social action and in public policy in general are included in the film policy debate.
- How to get the bigger countries more engaged: a surprising insight from Copenhagen was that it was relatively easier for national film agencies in smaller countries than in larger countries to persuade film industry representatives to participate in the ThinkTank initiative.

The menu of tasks that emerged in Copenhagen includes

- Getting film-funders to “think digital”
- Getting film-funders to think about what their objectives are, for example, maximising “public value”
- Identifying on what best to spend the money on the basis of clearer objectives
- Providing market intelligence as a contribution to the formulation of funding strategies and decisions
- Improving the process for selecting what projects to support and for managing that support, including who does the selecting and the managing
- Getting film-makers, distributors and exhibitors to take greater responsibility for ensuring that the public they receive contributes both to their being able to run better businesses and to the realisation of the goals for which the public money is given.

The importance of the Think Tank for Europe

The Think Tank is a new way of strengthening these contributions and of strengthening European film policy itself: as with society as a whole, film is subject to the fundamental technological, economic and social shifts associated with globalisation. Maintaining and adapting Europe's social and cultural values means that European film policy needs to continue to evolve. For European film to prosper there need to be rich and diverse film cultures, film cultures that are receptive to films from other countries. European film-makers need to strengthen their ability to reach and connect with audiences.

To maintain public support for film, both political and economic support for film – without which there would be no film industry – film has to deliver more effectively in more areas that people consider important. A film policy based on the twin pillars of national culture and economic competitiveness is not sufficient.

Increasingly questions such as how different cultures and countries can respect one another, how to achieve social cohesion and prevent communities – inside and outside the country – becoming alienated and antagonistic must be addressed. Film's ability to contribute to dealing with these questions may ultimately be much more significant than its contribution to the national culture and economy especially as the notions of national culture and national economy become, through globalisation, less clear and relevant.

Objectives for the Think Tank

The Think Tank has as its ethos and objectives

- i. Films having a greater and more positive impact on people's lives
- ii. The film industry making a greater contribution to society in terms of fostering talent and promoting artistic and economic innovation
- iii. Improvement in the operation of public funding, for example, working with funding bodies and governments to develop and implement better processes of support
- iv. Promotion and dissemination of solid and informed arguments in defence of public funding of film
- v. Encouragement and dissemination of high-quality research relating to public funding
- vi. Integration of creative people into the process of policy development and implementation.

What can the Think Tank be?

The Think Tank is conceived as an international organisation. It would be a membership organisation funded by multi-year contributions made by the members who would be national public film bodies like the Danish Film Institute. As part of the feasibility study we would also explore the Think Tank receiving support from a charitable foundation, ideally through an endowment. In this way it would enjoy long-term political independence.

The ThinkTank secretariat will initially be based in Denmark.

The ThinkTank will pursue three main activities:

- Organisation of ThinkTank workshops and major events
- A research and publication programme
- An advisory programme of projects to help establish/structure/re-structure film agencies.

Already, since the beginning of 2007, we have set in train various discussions with potential partners that point the way to we should like to the ThinkTank to go:

- Working with the Sundance Institute to establish an achieved dialogue between European filmmakers and those in the Sundance family, with a view to holding an event in New York hosted by the Museum of Modern Art
- Collaborating with national film agencies and with the Soros Foundation's Open Society Institute to build a programme to strengthen film policy-making in the transition countries of Central and Eastern Europe
- Taking forward in partnership with film funds the discussions initiated in Copenhagen to better define and more effectively pursue the objectives of public film funding by focusing on the particular challenges faced in Germany and Italy
- Launching a Fellowship programme that gives recipients of bursaries the time, space and freedom to enrich their thinking about how film could make a bigger contribution to social and political agendas

Putting in place the structures for promoting and disseminating high-level operational research that practically informs how film policies are brought to fruition.



»We can do a good a job in Europe and, if we are strong enough, if there is a European taste, made by the differences, the Americans will recognise it.«

Giorgio Gossetti

Director, Rome Film Festival



»The producers – and, very often, the directors and writers – are having to think what the state support people want to see in films rather than what the end-audience wants to see in those films. And, very often, those gatekeepers (as we call them) are not connected to the market place.«

Nik Powell

Producer, Director, National Film & Television School, Beaconsfield, UK

Organising the Copenhagen ThinkTank

BACKGROUND

Overview

The Copenhagen ThinkTank, organised by the Danish Film Institute (DFI), brought together stakeholders from industry and public funding bodies to consider effective strategies for strengthening and reinvigorating European film

The DFI invited leading European film producers and filmmakers, distributors, public funding bodies and decision-makers to join a ThinkTank to examine why and how we use public funds to support film, and how we could support film more effectively in terms both of advancing public policy objectives and improving film's artistic quality and its ability to prosper in the market place.

Three principles inform the ThinkTank initiative:

1. Filmmakers and producers need to take full responsibility for the artistic and commercial success of European film
2. Film-funders are to support – financially and with their expertise – initiatives by industry that enable practitioners to achieve their ambitions and that help establish a viable structure for production and distribution
3. Instruments, models and mechanisms need to be identified that best serve the exercise of responsibility and control over public subsidy and that deliver successful films in tomorrow's cultural and economic environment

The overall aim of the initiative is to assure the conditions for filmmaking, to create a space in which the films can work, and to realise the value to society of cinema. This involves

- **filmmakers better harness the opportunities for matching artistic endeavour with attractiveness to audiences**
- **film-funders taking greater responsibility for their creative, commercial and political decisions**
- **film-funders developing a strategic approach to their work that matches the resources at their disposal with the objectives they are pursuing.**

170 people from across Europe, Australia, Canada, Israel, Turkey and the United States took part in a series of plenary sessions and workshops. Working papers were prepared in advance to inform and underpin the discussions.

The context of the Copenhagen ThinkTank

The film ecology in Europe has the following characteristics:

- More than 700 films are produced annually in Europe, mainly dependent on the availability of public funds.
- Only very few of these films are able to get the attention of an audience either nationally or internationally and thereby generate revenues sufficient to cover their costs.
- Producers, distributors and exhibitors of European film are reliant on subsidy to fill the growing gap between the cost associated with the films and the revenues generated; for some – if not all – accessing subsidy has become their principal role, more important to their business than the development of successful creative and commercial strategies.
- The role of film funding and film policy has tended towards enabling producers, distributors and exhibitors to survive.
- In order to survive, producers need to have films in production; this leads to an over-supply of films that are “good enough” to attract public subsidy but not good enough and/or not marketed well enough to attract wider audiences and make a return.

The rising cost of supporting film and worsening results of that support, as well as the little or no progress towards the public policy objectives for which that support is given, will make it increasingly difficult to justify the current forms and level of support.

For the past two decades, the European film industry has blamed its failures on the dominance of US films that are dumped in our cinemas and that steal our audience. We have pointed to the insufficient size of national markets to sustain national film production. The response has been to use subsidy to reduce the cost of European films in the market place to a level that can be covered by that

market. In a few markets, this approach may be considered successful: the 20 or so Danish films produced each year achieve average admissions of 150,000 and a box office share of around 30%. But in most countries, the approach is an abject failure.

To confront these challenges, there needs to be a re-examination of what can be and is being achieved through the support of film. As a majority of the films that are being produced depend on public subsidy, the bodies that provide support will need to exercise responsibility – shared with filmmakers – for the outcome, and look hard at the methods used to make decisions for granting support. Then support can begin to be re-focused where it can be most effective; cogent arguments and evidence can be marshalled to show what the support is for; and practitioners, policy-makers and funders can put in place strategies and disciplines to enable them to realise their objectives.

The elements of the ThinkTank

The ThinkTank's key participants in Copenhagen were the directors of European, national and regional film funds and film professionals (filmmakers, festival directors, distributors, exhibitors) as well as policy-makers. They examined what they do, how we do it and why, in order to come up with answers to the big questions they confront:

- What are the criteria for deciding what to fund?
- Who is best placed to apply the criteria and make the decisions?
- What are the most effective ways of funding film – what mechanisms, when and where to intervene?
- How is success measured?

The conference was a staging-point in the on-going work of the ThinkTank. It was organised around a series of case studies focusing on particular funds and particular types of intervention.

Issues to be considered included:

- The relative merits of automatic vs. selective systems
- How the different types of support (e.g. training, de-

velopment, production, distribution, promotion) could best be combined

- How different funds could collaborate effectively
- The role of festivals, and how that role could best be played
- The value of supporting film, and how that value could be demonstrated.

Workshops were underpinned by working papers that provided a qualitative and quantitative analysis of the challenges, obstacles, successes and opportunities encountered.

Work Programme

The first meeting of the ThinkTank took place 21–24 June 2006 at the Danish Film Institute and at the Eigtved's Pakhus, the Conference Centre of the Ministry of Foreign Affairs, situated at the harbour of Copenhagen. The participants stayed at the SAS Radisson hotel, about 1 km away.

The Working groups

At the heart of the ThinkTank were the Working groups: each participant was assigned to one of five working groups. Each group focused on a set of issues, reviewing experiences and addressing sets of questions prepared by the working group leaders. Working groups could also break into smaller units to concentrate on specific aspects. The findings of the working groups were shared at the half-way stage and at the end of the event.

Plenary sessions

The plenary sessions were where the challenges for the working groups were set out. Renowned producer, Lord Puttnam gave the keynote. The themes were taken up in a presentation by Geoffrey Gilmore, Director of the Sundance Film Festival.

Evening programme

The evening programme provided an informal context for further discussion.

The Copenhagen ThinkTank was devised with the help of an advisory team, appointed by Henning Camre, CEO, Danish Film Institute

Jonathan Davis, Thinktank Co-organiser, Consultant, UK and Germany
Peter Aalbaek Jensen, Managing Director, Zentropa Entertainments, Denmark
Svend Abrahamsen, Director, Nordic Film and Television Fund
Peter Buckingham, Head, Distribution & Exhibition, UK Film Council
Véronique Cayla, Director-general, CNC, France
Guy Daleiden, Director, Film Fund, Luxembourg
John Dick, Managing Director, D & S Media, Brussels
Frédérique Dumas-Zajdela, Producer & President of the Agreement Commission, CNC, France
Michel Fansten, President, French Media Desk
Giorgio Gossetti, Director, Rome Film Festival
Philippe Kern, Director, Kern European Affairs, Brussels
David Kessler, Director, France Culture
Dieter Kosslick, Director, Berlin Film Festival
Philipp Kreuzer, Head of Co-production, Bavaria Film, Germany
André Lange, Director, Research, European Audiovisual Observatory
Erik Lambert, Consultant, Rome
Gudie Lawaetz, Managing Director, Farringdon Films, UK
Nadine Luque, Managing Director, Vice Versa Films, UK
Alain Modot, Media Consulting Group, France
Nik Powell, Producer, Director, National Film & Television School, Beaconsfield, UK
Alessandra Priante, Senior Analyst, Italian Audiovisual Observatory, Cinecittá, Rome
Antonio Saura, Managing Director, Zebra Producciones, Spain
Silke Schütze, Writer, Film-maker And Journalist, Germany
Neil Watson, Consultant, UK
Vinca Wiedemann, Artistic Director, New Danish Screen

The Copenhagen ThinkTank was an initiative of the Danish Film Institute sponsored by:

HUR – Greater Copenhagen Authority
Nordic Film & TV Fund
Nordisk Film Foundation
Zentropa Entertainments
Danish Film Institute



»In general, European film-making is very director-driven, and most of the directors are scriptwriters as well. So, this combination gives European film-making a very strong characteristic and handwriting.«

Roland Teichmann

Austrian Film Institute, Director

Organising The Copenhagen Thinktank

WORKING GROUPS

Leaders and Rapporteurs

Working Group 1

Raising expectations: the objectives and impacts of film funding

Leaders:

Pete Buckingham, Head of Distribution, UK Film Council
Neil Watson, Consultant, UK

Rapporteur:

Philippe Kern, Director, Kern European Affairs

Working Group 2

Realising the “brand value” of European film

Leaders:

Erik Lambert, Director, The Silver Lining Project, Rome
Albert Wiederspiel, Director, Hamburg Film Festival

Rapporteur:

Alessandra Priante, Senior Analyst, Italian Audiovisual Observatory, Cinecittá Holding, Rome

Working Group 3

Cohesion: driving success across the value chain

Leaders:

Alain Modot, Director, Media Consulting Group, France
Nik Powell, Director, National Film & Television School, UK

Rapporteur:

Antonio Saura, Managing Director, Zebra Producciones, Spain

Working Group 4

Identifying how co-production and the spend-driven funding mechanisms can contribute to film policy objectives

Leaders:

Guy Daleiden, Director, Film Fund, Luxembourg
Philipp Kreuzer, Head of Co-production, Bavaria Film, Munich

Rapporteur:

Nadine Luque, Managing Director, Vice Versa Films, UK

Working Group 5

Decision-making in funding

Leaders:

Simon Perry, CEO, Irish Film Board
Vinca Wiedemann, Artistic Director, New Danish Screen

Rapporteur:

Nuno Fonseca, Vice-President, ICAM, Portugal

Overview of the working groups

Working Group 1

Raising expectations: the objectives and impacts of film funding

Working Group 1 was devoted to strengthening European film both culturally and in the market place. It looked at film in terms of its “public value”, that is its intrinsic worth – as art and as the expression of ideas – and its instrumental effects – as a driver of innovation, creativity, media literacy, industrial capability and competitiveness. The aim was to embed film in public policy, to enhance the clarity of the objectives associated with film and the actions required to achieve those objectives.

The working group looked forwards to 2012 and the expanding opportunities for film to reach audiences and to contribute to the fulfilment of their needs and aspirations. It considered whether public policy for film was equipped to seize those opportunities, how it could adapt to take into account the changes in how films would be produced, financed and viewed. It considered not only how film funding could best be used but also the other kinds of regulatory initiative.

Issues:

What are and should be the expectations of European, national and regional film policies on the part of the public, the industry, politicians, government and other stakeholders?

Is our cinema delivering on those expectations? Can it? Do we have the right films?

Is there a mutual understanding of the potential value of film to society?

How should we express and communicate the goals and outcomes of our funding strategies? What would a film sector that was delivering on those objectives look like?

Are we putting public money in the right places in the right way, and are we taking into account the change, with the advent of digital distribution, in the way people get to see films?

Working Group 2

Realising the “brand value” of European film

For a film to be able to reach its audience, it needs to have a strong brand whereby it can be recognised and people know they want to see it. This brand is created by the film-makers and amplified through marketing and promotion: the expectations generated by the film and how the film is positioned. The elements of effective branding are located in the strategies of the distributors, the exhibitors and the bodies charged with film promotion. They are put into effect in campaigns, through the festivals, in the cinemas and via the increasing number of channels for finding out about and accessing film.

Working Group 2 analysed the possibilities for branding European film, drawing on the experiences of local and international distribution, of festivals and of cinema exhibition. It considered how branding might evolve in the changing film environment and what the challenges were for public film bodies. It looked at the strengths and weaknesses of existing marketing, distribution and promotional structures and how these could be expected to adapt.

Issues:

What are our objectives in how we position and promote our films?

Do we have the right films?

How do we promote films effectively? What are the effective strategies and policies for increasing access to and consumption of European films?

Distribution – do we have the right structures? Is distribution too fragmented? What can we do to improve the structures?

What is the role of festivals and how are they fulfilling it?

How do new platforms change the rules of the game?

Working Group 3

Cohesion: driving success across the value chain

“Cohesion” describes the strategy for creating and strengthening a film sector in which all the elements for success reinforce each other: identifying and developing ideas, along with the talent required to bring them to fruition; the structures and organisations in which that talent can work effectively; the material resources to sustain the talent. “Cohesion” is associated with “critical mass”; critical mass relates not only to the quantity of activity and opportunity but also to the ability to maintain that activity and opportunity over time.

Successful film strategies mean successful film companies. One definition of a successful film company is that it has ability to take a risk and to wait until the risk comes good. It has the means to invest in ideas and in talent. It can afford the failures and it can capitalise on success (i.e. it can keep the upside). But, crucially, such a company is not just betting and hoping, but has a clear vision, for which it can take responsibility, of what it has to do to succeed. We assume that the necessary elements of the cohesion strategy include effective training, stable and well-funded companies, a dynamic and diverse market, both nationally and internationally.

Issues:

What are the respective roles – of film companies, film schools, funders and financiers – in the development and maintenance of a thriving film sector?

What is the relationship of building a thriving film sector to the development of talent?

For a national or regional film strategy to be successful, how critical is success in any particular part of the value chain?

What is the relationship of a successful national or regional film strategy to the success of European film as a whole?

What are the terms of that success and how is that success gauged?

What are the lessons to be learnt from film companies that have achieved long-term success?

What is the relative importance in that success of continuity,

skills, professionalism, size, access to finance and access to distribution?

Does the film sector have appropriate career paths? Are there the right links with film schools?

Is the talent there? Is the funding system accessible to talent? Is talent retained and developed by the funding system?

What is the relationship between what talent wants and what funders want?

Working Group 4

Identifying how co-production and the spend-driven funding mechanisms can contribute to film policy objectives

Today co-productions are mainly driven by mere financial necessity while natural co-productions driven by creative and/or technical reasons are the rare exception.

With less financing available from the market sources, producers aim for maximum access to the various sources of public financing be it selective, automatic or fiscal support in different territories.

The objectives pursued by national and regional public funding bodies underpinning such support vary as much as they overlap. The most common main objective – to sustain a national/regional film industry – is becoming increasingly important in order to justify political support. But it may be that the main objective – to support films that people get to see – gets lost in the struggle to meet the objectives of strengthening the capabilities of the national and regional film industries.

The successful impact of public support is often only measured by effects on a strictly national/regional level. Therefore co-producing can have a negative impact on the artistic quality of a film. The main objective should be the production of better films which more people get to see and hence in the long term a more sustainable industry allowing filmmakers to benefit from producing successful films.

Issues:

What is/makes a good co-production?

Why do co-productions tend to work less well in the market

place (in terms of audiences in the majority co-production partner's country/the minority co-production partner's country/sales to and audiences in other countries) relative to 100% national productions?

What can be done to address the imbalance of co-production relations between territories?

How do the various different strings of each public funding body affect: film-makers' responsibilities, the public funders' responsibilities and the quality of the films?

How can the interests of small-country and big-country funders be reconciled?

What is the impact of automatic funding schemes (reference funding or fiscal incentives), especially on co-production?

How can automatic funding schemes be made stable?

Approximately 80% of all public funding – including tax incentives – is distributed by automatic systems. Is it healthy that there is little or no link between investment/ investor and project?

Working Group 5

Decision-making in funding

It almost goes without saying that funding bodies advance film policy objectives mainly by the way in which they allocate the money. But the way in which they allocate the money has four components: what the money is given for, who takes the decisions, how the decisions are taken, and the nature of the interaction between the decision-makers and the people to whom they give the money.

The lion's share of public funding goes to support the production of specific film projects. Most of the activity of funding bodies goes into the administration of production funding schemes. Most production funding schemes are selective: almost invariably, producers submit projects that are assessed according to established criteria and then funding is awarded, usually on the basis of subjective judgements since – invariably – there are more eligible projects and the total amount of money requested is greater than the amount in the fund.

The decision may ultimately be made by one person or by a commission. It may be made on the basis of a more or less formal review of a dossier. It may involve greater or lesser

negotiation between the funder and the applicant.

The working group considered and compared the prevailing processes for allocating funding in a number of different countries to examine the responsibilities of the decision-makers and how those responsibilities could best be discharged. It explored the relationship between the decision-making process and how the films performed, how decisions made advanced policy objectives and how the outcomes of decisions corresponded to expectations.

Issues:

What are the basic criteria for public funding across Europe?

How can one best distinguish between the qualities and results of selective funding versus automatic funding schemes?

What are the advantages/disadvantages of the single decision-maker system versus the commission system?

What competencies should be required of the single decision-maker and of commission members?

When it comes to the actual decisions, who takes responsibility, how and for what?

Are the incentives for the funders/the producers/the directors consistent and compatible?

What, apart from allocating the subsidy, is the role of the public funder and in what ways can the public funder add value to a project?

What are the best practices and the success factors in the development process and finally the film?

Organising The Copenhagen Thinktank

RULES OF ENGAGEMENT FOR THE THINKTANK

Crucial to the success of the ThinkTank is the participants' confidence that they can share information and speak their mind.

To this end we set out the "rules" according to which discussion at the Copenhagen ThinkTank was to be conducted.

1. All discussions were on an unattributable basis: no-one was to be quoted without their express permission.
2. Some participants in the Copenhagen ThinkTank earned their living as journalists but they were at the ThinkTank in their capacity as industry experts, not as reporters.
3. All information disclosed was only for the purpose of the discussion and was not to be cited outside of that discussion.
4. Any conclusions and recommendations put forward by the working groups were for the use of Copenhagen ThinkTank participants only, for them to take away and use (or not) as they see fit.
5. The ThinkTank would be publishing information, but only in keeping with these rules.

Organising The Copenhagen Thinktank

PROGRAMME

Day 1 – Wednesday, 21 June

– Venue: Danish Film Institute

- 15.00 **Welcome and introduction**
Conference chair: Henning Camre
- 15.45 **Scene-setting**
- Presentations by the working group leaders of the five main themes:
- **Raising expectations: the objectives and impacts of film funding**
(Pete Buckingham and Neil Watson)
 - **Realising the “brand value” of European film**
(Erik Lambert and Albert Wiederspiel)
 - **Cohesion: driving success all along the value chain**
(Alain Modot and Nik Powell)
 - **Identifying how co-production and spend-driven funding mechanisms can contribute to film policy objectives**
(Guy Daleiden and Philipp Kreuzer)
 - **Decision-making in funding**
(Vinca Wiedemann and Simon Perry)
- 17.15 **Key note: Lord Puttnam**
- The challenges for European cinema in the 21st Century**
followed by discussion. Moderator: Antonio Saura
- 19.00 **End of first day**
- Evening **Reception and dinner at the Danish Film Institute**

Day 2 – Thursday, 22 June

– Venue: Conference Centre

- 9.30 **Working groups (1st Session): getting-to-know-one-another**
- 11.00 **Plenary: Geoff Gilmore – Independents USA**
followed by discussion
- 13.30 **Plenary: National funding systems and their objectives**
Discussion led by Simon Perry
- 14.30 **Working groups (2nd Session)**
- Evening **Dinner hosted by Zentropa**

Day 3 – Friday, 23 June

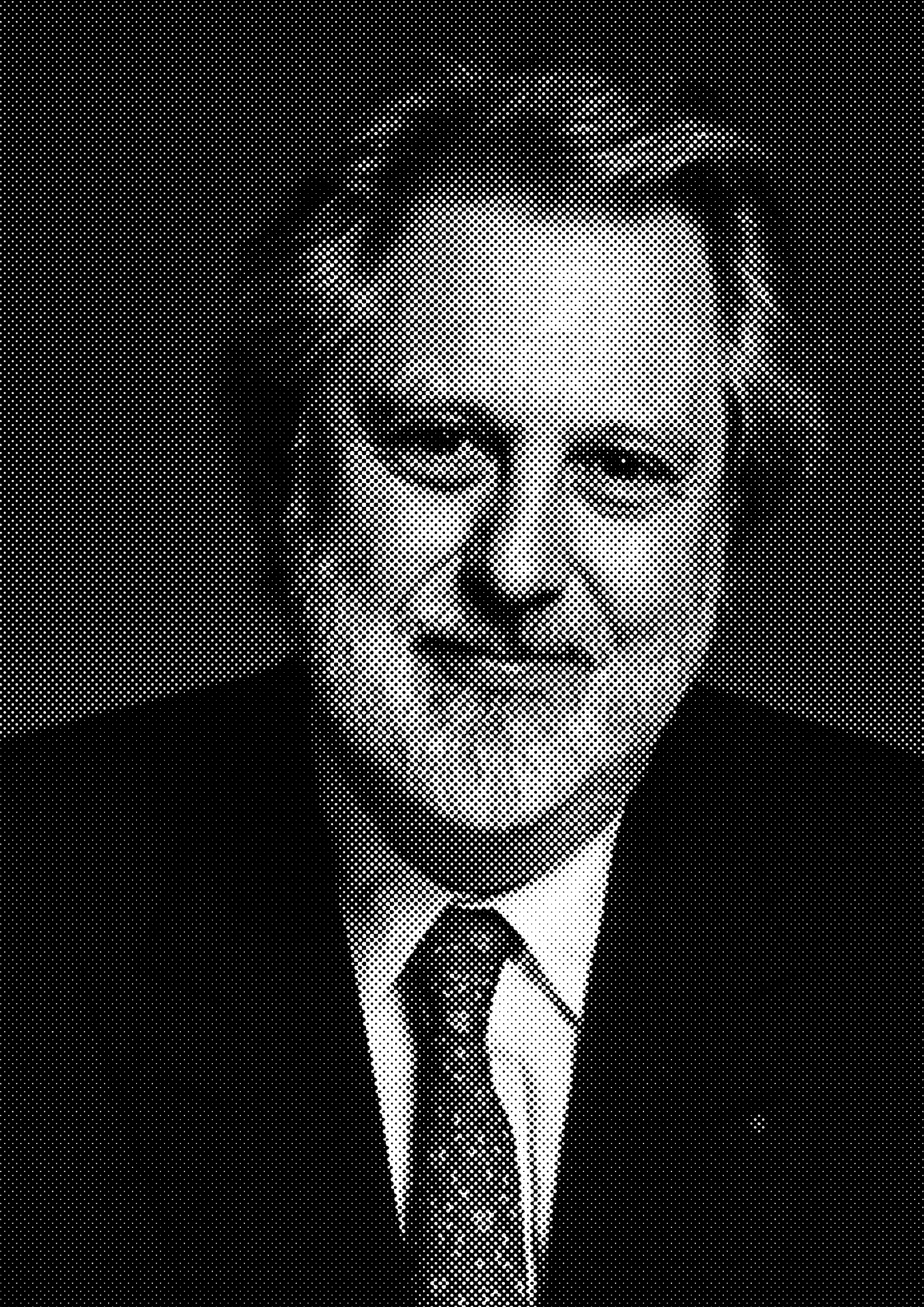
– Venue: Conference Centre

- 9.30 **Plenary: Interim reports of working groups**
- 10.00 **Working groups (3rd session)**
- 16.00 **The way forward (Plenary)**
 10-minute presentations of the conclusions
 of the working groups
 - Discussion
- 17.30 **Overall conclusions: Henning Camre**
- Evening **Midsummer's Night celebration on the
 island of Middelgrunden,**

Day 4 – Saturday, 24 June

– Venue: Danish Film Institute

- 10.30 **Evaluation and next steps**
- 12.30 **Lunch**
- End**



The work in Copenhagen

THE CHALLENGES IN THE TWENTY FIRST CENTURY FOR EUROPEAN CINEMA

Keynote speech by

Lord Puttnam, CBE

A rise and fall of European cinema

I am not going to talk about film policy or film funding: I have expended enough energy doing that for almost thirty years. Instead I would like to focus on some aspects of the 'culture' of cinema because it gives me the opportunity to throw down a few challenges – not that I can offer all, or even that many answers to the questions I'll be posing.

My principal purpose is to stimulate a debate, one that goes well beyond issues of policy and funding, and stretches to a point at which we might become a little clearer about exactly what it is we want European cinema to achieve.

What would 'success' look like – and would all of us recognise it?

We in Europe tend to wear the badge of culture on our sleeve, and for the most part with great pride. We use it as a means of differentiating ourselves from much, or even most of the cinema created by the Americans. But is it really enough, simply to wear the badge? Are we really sure that our European cinema, in all its many and diverse forms, is really all that distinctive, particularly when compared with some of the recent output from the United States?

Let me start by painting what might appear to be a ridiculously idealistic picture. This is of a cinema attracting very large audiences, a cinema based on a combination of contemporary stories, entirely relevant to our daily life in Europe, along with adaptations drawn from our shared literary heritage. This is a European film business based on a rapidly developing international network of distribution, with outposts all around the world, and with a market share, in the US, of 60%. European films are so popular with American audiences that they are being aggressively pirated all over the United States. Despite which, the business remains vastly profitable.

By now you are probably beginning to wonder if I am com-

pletely off my head. But the truth is, had I been standing at this lectern, just under a hundred years ago, I would have been describing the success of European cinema in precisely these terms. Thanks to companies like Nordisk, Pathé, Gaumont, and Italy's Cines, Europe's domination of the global film industry and global film culture generally was all but complete.

It was a period of incredible entrepreneurial energy in Europe, a time when we had the confidence to draw on stories rooted in our own culture and export them to audiences all over the world – but it was also of course a time when there was no language barrier to a film's success.

I am reminding you of this in part to try and put some of your discussions at this ThinkTank in perspective.

Almost ten years ago, I wrote a book, *The Undeclared War*, which, among other things, sought to explore how, and almost more importantly, why, the extraordinary cultural and industrial influence that European cinema possessed in those early days, was lost. The impact of World War I on parts of our industry, and the transition to sound, were, of course, tremendously significant. But something deeper was also lost, and for reasons that are perhaps rather more difficult to identify. We lost a sense of confidence and energy, and, most seriously of all, we lost our sense of connection with the audience.

From time to time, something approaching that same confidence and energy has unquestionably resurfaced. It has manifested itself in Italian neo-realism, the 'New Waves' in France, in Germany and in Eastern Europe. But do we remain entirely certain that our ability to connect with the audience, to really speak to people in all their extraordinary diversity, is alive and well?

The (potential) power of cinema

The principal arguments set out in *The Undeclared War* are, if anything, more relevant today than when the book originally appeared. In it I claimed that film was, and remains, a unique medium for conveying ideas and for helping us to shape our sense of exactly who we are.

Many people will claim that cinema is essentially an entertainment medium – with a few rather old-fashioned intellectual pretensions. To puncture that belief let me offer a couple of recent examples from my experience of working in schools in the UK to stimulate the use of cinema as a teaching and learning tool. We screen movies like *Twelve Angry Men* and, as the lights go up at the end of film we ask the kids, “From the cast of characters you’ve just watched who do you want to be?” And they invariably say, “Henry Fonda.” And I ask, “Really, why? After all he’s the guy that kept everyone else stuck in that hot room for hours on end when what they really wanted to do was go off and watch baseball.”

But they quickly see past that, and will explain in some detail exactly why Henry Fonda represents the character they would wish to be. And eventually you are forced to say, “Congratulations, you are now thinking like real ‘citizens.’ You have understood the sometimes difficult nature of responsibility. You’ve understood how complicated life can be.” Cinema has, in effect, worked its magic and opened a window for them. It has changed them, just as it changed me fifty years ago!

Here’s another, possibly rather more compelling example. Take today’s renewed debate around the subject of ‘Creationism’. Hopefully most of you in this room have, at some point, seen Stanley Kramer’s film *Inherit the Wind*. If you want to have a really thoughtful discussion with a group of 14-16 year-olds about Creationism, show them *Inherit the Wind*, and at the end ask them who they think wins the argument, and how they now feel about the issues the film explores. I know of no finer way of informing and stimulating that particularly difficult discussion, and of course I could make exactly the same case for any number of other films and many other subjects.

In my experience there has always been a social role for cinema to play. For example, in the 1950s and 1960s the overwhelming domestic issue in the US was race. But prior to the mid 1950s, it would be fair to say that cinema had, if anything, been part of the problem, by giving the impression that the problem didn’t really exist! But, from the late 1950s onwards, American writers and directors started addressing the issue head on, and supplied much

of the momentum that allowed the integrationist movement to achieve and eventually dominate the moral and political high-ground.

There are those who believe that the sense or ‘moral purpose’ that lies at the core of the films I’m describing vanished along with black-and-white cinematography. Happily, there would appear to be a new generation of gifted American filmmakers who seem prepared to address (or rather re-address) the complexity of issues surrounding race and prejudice without flinching. I would cite a film like *Crash*.

I have never wavered in my belief that there’s a fairly precise correlation between the nature of the cinema people are offered, especially young people, and the view they come to form of themselves. Why should this be? I think it’s got everything to do with cinema’s unique ability, under cover of darkness, and assisted by the overwhelming size of the image, to find its way into our subconscious and, having taken root there, subtly shape the way we see ourselves in the context of the world about us. Once that’s occurred, what gets reflected back can be the very best, or the very worst aspects of our personality – sometimes a little of each.

Throughout my thirty years as an active producer I was always aware that filmmakers can take advantage of this phenomenon in either of two ways: they can seek to reflect back the dreams and whatever else it is that allows us to celebrate our potential as human beings, or they can reflect the negative, even violent survival instinct that lurks within pretty well all of us. I’ve always felt that the former is an act of cultural generosity – a form of love even; whereas the latter is in every respect a form of exploitation.

Films are probably not the best medium for exchanging very complex ideas but they are unbelievably successful at creating lasting images and emotions. And as the history of world cinema has proved time and time again, the stories that really last are those with which an audience can most closely identify.

My own life has been hugely influenced by a number of movies, the first of which I saw when I was little more than

eight or nine years old. It was called *The Search*, and it starred Montgomery Clift. It was also the first full-length feature film to be directed by the brilliant Fred Zinnemann. It was something of an experiment at the time in that it was partially financed, as well as distributed by MGM, in partnership with the then embryonic United Nations. All I remember was sitting in the darkness of my local cinema in North London desperately wanting to become exactly like the person I was watching up there on the screen. To me he represented precisely the type of sensitive heroic figure who, in the nightmare that was post-war Europe, finds himself attempting to re-discover what human beings, what human life, is really all about.

I suppose it was all tied up with the way in which I was adjusting to getting to know my own father. Having been away for six years he'd only recently returned from the war. In the movie, this young boy, a refugee who's been separated from his mother, effectively foists himself onto Clift. He initially does everything he can to get rid of the kid but, over time they become increasingly close – to a point at which they are, to all intents and purposes, inseparable.

In the end (with the help of Unicef) he is able to reunite the child with his mother, and in doing so of course, loses the child. To me, it was a perfect tale about how a decent human being effectively sacrifices his own happiness by doing what is in every sense the right thing. The impact of the film remained with me for over 50 years, to the point that when I was approached about becoming President of Unicef, I leapt at the opportunity.

Another film that left an indelible mark on me when I first saw it was *East of Eden*. By now I would have been about fifteen, and living through a whole turmoil of complex, angst-ridden teenage emotions, typified by a ridiculous over-reaction to any form of perceived rejection! At the end of the film there is a wonderful scene in which James Dean is sitting at his father's bedside, holding his hand. His father has had a stroke and cannot stand the nurse whose been sent to look after him. Cal (his son, their roles having effectively been reversed) assures his father that he's going to look after him.

Each of you will have been through your own personal version of this type of situation. You've been hurt, maybe hurt

a lot, but at the end of the day you've hopefully managed to make peace with your family.

I mention these examples in support of my belief that cinema has this fantastic ability to influence minds, notably young minds, and at its best instil in them a sense of aspiration, a sense of belief in the possibilities that life holds. It enables its audience to see the world through the eyes of others, and to seek out and create a level of tolerance and even respect for differing viewpoints. At this point in our history, this is something which must surely be more critical than ever.

Keeping the faith - or not

Given all of this potential, cinema should have retained enormous significance for today's global society – especially during complex and uncertain times like those we're presently living through. A possible re-formulation of the old prayer in times of crisis might be: 'cometh the hour, cometh the medium!'

Sadly, all too often over the past twenty-odd years, filmmakers on both sides of the Atlantic have failed to constructively tap into the real emotional power of their medium. This applies especially to film's ability to portray the world around us – as it is now, as it has been or, perhaps most importantly, as it could be. The overwhelming majority of the mainstream output of Hollywood in particular has, for far too long, been guilty of playing games with reality, as well as with history.

It has been playing with reality by allowing actions to become entirely divorced from their consequences: ever bigger explosions that miraculously don't kill the most important of the protagonists; simulated plane crashes which the right people 'somehow' survive; and most commonly of all, shootings which create victims without widows or orphans! Having watched a particularly brutal homicide, in how many mainstream movies do we then see a policeman walk up a garden path to tell a woman that her husband has been killed? Let alone witnessing that mother having to decide whether to tell her twelve year old child, who is about to appear in the school play, that her father is dead?

This is of course the stuff of real human drama; these are the inevitable consequences of tragic actions. Yet, with a few honourable exceptions (*Crash* and *United 93* would be excellent examples), here is a whole world of human experience which has been effectively abandoned by mainstream cinema, or left to the comparative simplicities of television soaps.

In this sense it has to be said that contemporary cinema has extracted very little of value from history or experience. Increasingly it satisfies itself with merely reducing events, now or in the past, to a simple struggle between good and evil; a struggle in which complexity and nuance have been entirely wrung out of the narrative.

One of my purposes in being here today is to argue that we in Europe are failing to offer any real alternative to this view of the world. It hasn't always been like this.

In fact there is something of a paradox here that's well worth re-visiting. When I first started making movies in the late 1960s, European cinema was enjoying a period of enormous, I'd even say, disproportionate cultural influence in the United States because of the tremendous growth of film societies in American universities. A substantial and well organised market for 16mm films was being fed by a tremendous uplift in the number of young people entering higher education. Recognition of this resulted in the reasonable belief that if you could just 'hang in there' for five or ten years there was likely to be similarly inexorable growth in the number of Americans who were attuned to, or even genuinely interested in European cinema.

These college film societies would book a lot of very interesting stuff: Bresson and Renoir, the established Eastern Europeans like Wadja, along with their then younger Czech equivalents, Forman, Kadar and Menzel; and of course there was Bergman, Ray, Kurosawa, Rossellini, Fellini and De Sica - all of whom seemed almost to come from another planet!

A number of these films found an audience, and performed comparatively well in the many commercial art houses that were around at the time. And it wasn't just language that made them different, they also dealt in rather more complex narratives. These were stories and, indeed, societies which

refused to be reduced to the simplicities of a struggle between 'good' and 'evil'.

At that time there was a more than reasonable expectation that we were moving into an era which embraced diversity of film-going and therefore, inevitably, filmmaking. If you in any way doubt what I'm saying, read any account of the early influences that worked on the imaginations of Francis Coppola, Martin Scorsese, George Lucas and all the rest of their generation. Then, in the mid- 1970s, this type of cinema, and the cultural influence that came with it, literally hit a brick wall. And why? Because, at least in part, many of the emerging European 'auteurs' became overly self-conscious and simply turned their backs on their audience - both in Europe and in the United States. Also in part, and for reasons that continue to baffle me, cinema-goers in increasingly prosperous and ostensibly well-educated societies got rather less discerning and, for some reason, less interested in what films had to say about life. The tremendous and entirely rational optimism which had been so inspiring was allowed to basically 'die on the vine.'

'Dare to speak the truth to power'

One of the last really great European films about the complexity of life was probably *Fanny and Alexander*. It is one of the few European films made in the last twenty five years which allowed me the sense that I was watching a film by somebody who understands the difficulty of just being 'a human being'. Here is a filmmaker who is really trying to help me navigate my way through the complexity of life.

I am not for one moment arguing that we should seek to recast our medium as some fragile and over precious art form, rather than the robust outward-facing industry it has always been. Ultimately, cinema has to be commercial. The economics of film-making simply demand it, and the failure of much of European cinema over the past quarter of a century has stemmed from its reluctance to fully come to terms with that reality.

For a number of years we in Europe were encouraged to believe that we could ignore our audience by hiding behind a comfortable and ever-shifting wind-break of subsidy.



»The strength of European film is the creativity of the film-makers, a lot of passionate people, and quite a lot of public money.«

Peter Buckingham, UK

Head, Distribution & Exhibition, UK Film Council

There is something in the order of 1.5 billion euros of public subsidy currently finding its way into European cinema every year. In exchange, we turn out about 700 films. That's a very significant amount of subsidy and a very large number of films. Yet, for all this public investment, and for all the energy expended on production, where are the European examples of work that this year sits comfortably alongside *Crash*, *Goodnight and Good Luck*, *Brokeback Mountain* or even *Munich*, all of them films that have a fair degree of cultural integrity and have managed to reap an equally fair degree of commercial success. And then think too of feature documentaries like *Super Size Me*, *The Corporation* and, most recently, *Enron*, *the Smartest Guys in the Room*, films which 'dare to speak the truth to power.'

Have we in Europe lost our vision? Why has most European cinema over the last few years been unable to connect with the audience in the way that these films managed to connect with their's? Perhaps we've been so obsessively focussed on getting films made and, in particular, finding the money to get the films made, that we've neglected our sense of what kind of European cinema, or cinemas, we actually want.

I was pretty scathing earlier about much of contemporary American cinema. However there are signs that a new ethos, a new ambition is emerging. Could it be that in some sense the Americans are stealing our clothes by once again making the type of films we claim we want to make and, indeed, making them extremely well?

Conclusions: Why cinema matters

On its own cinema can never cut through, let alone solve, significant social or cultural problems. But by 'illuminating' the sometimes very different lives and experiences of others, particularly the young, cinema helps to create that vital 'context of understanding' within which change that sometimes looks impossible can begin to look possible. As we have all experienced, once you cross that frontier of doubt, trust begins to develop, and before you know it, the unthinkable becomes, not only thinkable - but achievable. This is why cinema, and its relationship with history and the 'real world', matters.

From my perspective, far and away the most important role of the individual film maker is to help explain the ambiguities and complexities of life, and in doing so, help promote understanding and, where necessary, even constructive compromise.

That's what I tried to do in the films I produced that dealt with historical events, most obviously in *The Killing Fields*, *The Mission*, *Cal*, *The Duellists*, but also in its own way, in *Chariots of Fire*. In every case I tried to make a film that adhered to some genuine concept of 'cultural integrity'. By that I mean without diluting the movie's ability to engage and even entertain the audience, it still attempted to offer some of those truths and values that defy fashion and survive the worst of the depredations of history.

This is probably a good moment to tell you a story about the film of which I'm probably most proud – *The Killing Fields*. A few years ago I was introduced to Ukraine's President Viktor Yushchenko. Having been told by an aide who I was, he embraced me and described through his interpreter how, on the eve of the "Velvet Revolution," *The Killing Fields* had been screened in Kiev. It was seen as a message of what would happen in the Ukraine if they did not pull back from the brink of civil war.

It is because the possibility continues to exist to make this type of impact, the resurgence of a 'socially engaged' independent cinema in America is enormously encouraging, and represents an important challenge to us in Europe.

The most interesting movies emerging from the United States are what I'd describe as 'The Cinema of Insecurity'; films that in one sense or another are beginning to ask a lot of questions about their own society. That makes total sense because I feel the United States is going through a very severe crisis of self-confidence. As a result, American cinema is becoming increasingly, and interestingly, introspective. There's an anxious 'edge' to everything about the United States at the moment, and these 'edgy' films are a valuable indicator of the myriad fears plaguing their society. They are questioning themselves constantly, relentlessly, and for the most part, intelligently.

A number of these films are in fact steeped in their portrayal

of self-doubt. In smallish doses self-doubt is probably good for a country. It can be the catalyst for the effective 'reinvention' of a society, a means of avoiding impending chaos. It can be interesting, and important, a kind of 'renaissance', but it can also very dangerous: too much self-doubt can very easily result in, quite literally, an explosion of frustration.

So we have this group of American films which seem prepared to seriously interrogate their country's recent history. I would single out *Goodnight and Good Luck*, the story of Ed Murrow, and in particular the scene in which he interviews Liberace. Murrow knows, and he knows that we know, that he has had to embrace show business in order to protect serious news – and he's discovering that the values don't mix very well.

Ed Murrow's story is in a sense all of our stories. Why would you go into journalism without wishing to share Ed Murrow's values, Ed Murrow's morality? And indeed it was people like Ed Murrow who helped steer the United States through what was a very difficult period of its history. The film, it seems to me, asks the question, 'who will it be this time?'

I can well imagine any journalist watching this film, thinking, "You know what: this is, or at least has the capacity to be, a noble profession." Indeed it can at times be a vital profession – a truth we've been reminded of any number of times in the past few years. That should be enough to allow journalists not just to feel good about themselves, but maybe even good about the job they do.

European cinema, by and large, seems to have lacked the ambition to engage in this way. But it's worth holding on to the dream. The dream of our own cinema, a cinema that does 'dares to speak the truth to power,' a cinema that, in its infinite variety, speaks to all of the communities that now make up the map of Europe. The dream of a cinema that entertains, that engages, and that endures – a cinema that leaves its imprint as much on our hearts as on our minds, and an imprint that lasts long after the lights come up.

It is a dream that, one hundred years on, is as powerful and as valuable as it ever was.

*Lord Puttnam illustrated his speech with clips from *Afgrunden (The Abyss)*, *Crash*, *Garden State*, *The Assassination of Richard Nixon*, *Goodnight and Good Luck* and *Cinema Paradiso*.*



SECTION

The work in Copenhagen

THE REVITALISATION OF EUROPEAN CINEMA

Keynote speech by

Geoff Gilmore, Director, Sundance Film Festival

An outsider's perspective through the other end of the telescope

Do you know what percentage of Americans have passports? It is 11%. That says something, not only about the majority of citizens in the United States, but also about the insularity of American film making and of the American industry.

Instead of bashing American culture and American filmmaking, I wish to talk about it in the context of what I think is a change in the world. And in terms of media the world is changing more now than it has at any time since the 1950s. That is something which needs to be kept in mind.

The thoughts I am going to set out for you represent an outsider's perspective and they may lead you to re-think a little bit. As I stand up here, the thought that comes into my head is, "What the hell can I possibly tell you that in 20 years of conference-going you have not already heard?" How many times have you had the discussion about what European film is, how it is going to evolve and where it should be going? This is not to say that there is no solution, but sometimes the only way to think about it is to look at it through the other end of the telescope. I am really trying to figure out if there are ways to think about European film which perhaps we have not used before. Maybe you will indulge me a bit if I talk about a different model and how that works.

American independent film works in a somewhat different way to American film generally and in some ways it can make us think about European film and European film culture.

I used to be in love with the European film. I grew up with it. I am in this job and this business because of European film. I fell in love with cinema through European films. They were the films my generation watched in college. It is the auteurship, the creativity and the vitality of these works that brought me to film. But I am not in love with European film anymore. I am not saying that I do not love some European films. And I am not saying that there is not a quality to

European film. But I am not in love with it the way I was 30 years ago. And what does that say? I think of the position that European film had back then, the influence that it had, the importance that it had for the world, for generations of filmmakers. That has been supplanted. In many ways one could say that the most exciting filmmaking in the world in the last 15 years has been Asian, and that the Asian auteurs have substituted the European auteurs of some 30 years ago. That really causes you to reflect on the position of European film in a global world.

I am not sure that European film should be talked about as an entity unto itself. It seems to me that one really has to talk about it in the context of global filmmaking. And in the context of how the world works there really is only one dominant cinema and that is the American majors - Hollywood. And when I say American majors, I don't mean American cinema per se. I am not talking about American independent film. There is a great opportunity that can be created in the face of what Hollywood filmmaking is.

Platforming the new

I think sometimes there is a misunderstanding of what American independent filmmaking is. I think people have come to look at American independent as filmmaking which is either an extension of the Hollywood system or as something similar to European or Asian film: a few key filmmakers that you talk about, the Tarantinos, the Jarmusches or whatever. Because that is the way American filmmaking is represented in Europe. But that is not what American independent filmmaking is at all to me. In fact, much of what I value in independent filmmaking I doubt very much you will have seen. Much of the American independent filmmaking that I really value and try to platform does not get to Europe. It does not necessarily travel. It does not necessarily find distribution. And some of it, in fact, is work that in different ways is not of the quality that could travel. It is not the kind of work that one thinks of as being on the same level as what one talks about when one programmes the major European film festivals.

That is part of the problem we are talking about here. When I took the Sundance job a number of years ago,

one of the things with which I was confronted was what kind of a job I was going to do. I was not that interested in American independent film. I did not think it was all that great. I am still not sure that it is all that great. In many ways one of the things I did not want to do was to become someone who privileged a certain kind of artistic auteurship of American independent filmmaking and said, "These are the filmmakers that we will value, that every year you will come back to see." So I set myself the task of getting away from what I saw as the two poles of most film festivals: art and glamour. Art, in that sense of the auteurship, the artistry of major world filmmakers; and glamour, that kind of sexiness and the corporate launching of the films that happen at festivals. I said, "What is another ground, what is another platform that I can use Sundance for? And how can that platform be used in a way that actually helps you discover new filmmaking and new talent?"

This is the ground that I look to Sundance for. A ground that helps you look at work that every year changes. Every year you will see a new generation of American independent filmmakers come forth with a range of different kinds of films, and the quality of that work really changes the way people talk about American independent film that year. It is not work that necessarily is the most sophisticated or the greatest filmmaking in the world. In fact, I know a lot of critics tend to complain how, at Sundance, film is not of the quality they find in other world film competitions - you know, "Why isn't it on the level of the Cannes film competition?" Well, that is because they are first or second time filmmakers, for one thing. But it is also work that I very much try to establish and try to represent as a way of thinking about freshness, of originality, a kind of yearly revitalization.

It is not something I often get when I come out of a European film festival. I very rarely walk away from a major European film festival with the idea that I'd seen a really fresh and distinctive range of films. More often I walk away saying "That film could have been made 10 years ago. That filmmaker could have been working 10 years ago." I am not here to attack auteurs and I am not here to try to argue that somehow the platforms of the European film festivals should be different and more similar to what I am trying to do with the Sundance. I am trying to say

that what we privilege at Sundance is something that I rarely see privileged at most major film festivals around the world: a kind of distinctiveness of the next generation, a newness that looks at its work and says "What's good about this?" - not "Is this the next Wong Kar Wai?" It is not necessarily the next Wong Kar Wai, but the work is fresh and interesting and could lead to the emergence of a director or a writer.

One of the things that is asked about Sundance every year by a range of media is "What is this year going to be about? What is the theme of this year? What is going to come? What kinds of film will emerge?" These questions come because, for the most part, the films that I am showing are by directors people have never heard of and whose work we have not seen before. They are not the films which people are necessarily anticipating. They are films that sometimes come out of nowhere. And because of that, I think a constant revitalization goes on in the independent arena which I very much want to try to platform.

That, perhaps, is at the root of the success of American independent filmmaking.

Don't talk economics

If you want to try to analyze what the success of American independent filmmaking is, don't talk economics. It is not that successful economically. A great many of the American independent films that are made never see the light of day. And of the group that do see the light of day, very few of those actually become successful. And when one starts to look at the numbers, they are pretty dismal sometimes. In 2005 there were eight American independent films that made over one million dollars. In fact, 80% of the work that was released in the US made less than \$1 million. 50% made less than \$100,000. And that is out of 560 plus films that were released in the US last year. Which are more films than have been released in the US at any time since the 1950s.

The economics of American independent filmmaking is a bad prospect. But in many ways it offers an understanding of what people look at when they think about American

independent film, which embraces its originality, embraces its energy, and embraces the emergence of new artists. There is a lot of talk about the fact that American independent filmmaking is not distinct from studio filmmaking, and really nothing could be further from the truth. In a world in which the average cost right now of a studio film is about \$50 million and the average marketing costs are about \$36 million – let us just round it off to roughly \$100 million on average – in comparison to a *Brokeback Mountain* costing \$14 million, a *Capote* costing \$6 million or a *Syriana* costing \$8 million or so, you are talking about different worlds. You can say that both are filled with major actors, but the last thing I want to suggest is that the fact that a major actor participates in a film is a guarantee of its success.

Serious changes are taking place in the film world, globally. And we, most of us, are pretty much aware of many of these changes. But I would expect to hear more about this at a ThinkTank talking about the future. That is, how much this world is undergoing a change, a massive, complete change. Not just the common, “What’s going to happen in five years with broadband distribution and all the different networks?” but, literally, the differences we are seeing right now in terms of the way that the global industry is thinking about itself. The American film industry right now is more focussed on the global market, which is something David Puttnam brought many years ahead of his time to a studio when they were not focussing on the global interest. The only growth that the American film industry is now looking towards is global growth. That is where the growth for them has to take place. And that changes dramatically what they think about in terms of what they are producing.

Everything is going to be different

Looking outwards also makes the studios incredibly unsure of themselves. Because I have never seen an industry which is more worried about and doubting of what it is producing right now than Hollywood today. They have no idea if *Mission Impossible* is going to play in Singapore. Or whether or not any of the films they make that work in the US will travel abroad. And so the world that we now find ourselves in is one in which the sights have been realigned and strategies have changed.

We have now seen three years, of decline in the theatrical grosses, not only in the US but globally, and again, I can call on the statistics: last year the grosses were down 6% in the US and they were down between 3 and 15% in most places in Europe. One can talk about a range of different places and how to evaluate that. But it is no longer good enough to pretend that this is just a temporary phenomenon and that we will get better movies next year when everything is going to be different. The theatrical world is now undergoing a significant and major change affected by what happens in home entertainment world. This only makes sense. Home entertainment revenues are five times the revenues of theatrical for any of the American majors even taking into account the levelling-off of DVD revenues in 2005. The fact of the matter is that the growth part of the DVD revenues and other ancillary revenues far surpasses the growth part for theatrical. And yet theatrical still drives all that ancillary revenue, or it has until this point.

So what does the future portend? This is where the range of different issues really starts to open up for what the possibilities are for change. We are in a position now where we are not only having change in the theatrical windows but we are collapsing the windows. We have DVDs being released 4-6 weeks after the theatrical release. Why is that? For the very simple reason that, if you are spending \$3.3 billion on marketing and it is all focussed on opening weekend, how can you take advantage of that? You don’t want to re-spend another billion dollars a year down the line. What is the significance of that? It means that everything that has to do with how films have been in the US is undergoing a change. Most cable networks, which were fuelled for the last 25 years by showcasing films, are now longer characterised by films. HBO is not subscribed to by anyone who wants to watch the film they are showing 18 months after its theatrical window, because they have already seen it. Or they already own a copy. HBO is filled by *Sopranos*, by sports, by specials, and by a kind of contemporary American television that is bypassing the networks themselves. And what does that mean? It means that the pay television output deals that these networks and studios have had are going to be a thing of the past. We are not going to have Starz! paying \$2 billion to Disney or Universal for output deals for the films coming out five years from now. You may see a complete collapse in the

number of pay channels, or at least their reorganisation. And since that is still one of the few ways in which European films get to American audiences, it is something to which you might pay attention.

The dominance of the home entertainment area, the changing of DVD revenues, the changing nature of cable television, the changing pattern of the theatrical attendance, an increasingly crowded market place, the many more films being produced now, even with diminished possibilities for distribution theatrically, the change in focus of American majors on the international marketplace, the growth of day-and-date releasing, the growth of a single day-and-date releasing worldwide. This last phenomenon may not seem an issue for you to think about but it points to a strategy that may in fact be something which a number of different companies take on and start to utilize. It is interesting how much opening weekend now dominates art film distributors who have to play by the same rules as the studios. And do you know why? Because what has been a fundamental marketing issue for American independent and international film has always been what we usually call the word-of-mouth. And guess what? It has become a thing of the past.

This is the scariest, I can tell you. How do you get visibility for your work if you cannot set up a conversation about it and word-of-mouth ceases to operate? And why is that conversation becoming a thing of the past? Because there are so many films on the marketplace that the exhibitors do not hold on to work any more. And exhibitors do not hold on to work anymore because they are being pushed by the big guys who are telling them, "I want those theatres, I want those screens, whether these films are performing or not." And so you are in a war out there for shelf space, for theatrical space. You are in a war to find visibility.

As broadband becomes the path to the audience, the question is still posed: does the possibility for distribution over the internet exist? The answer is that it depends on how you are going to market your film. Because the issue is not whether you can deliver the product to people but how you get people to know about what you are doing. There is more financing available than ever before, for both American independent films and for international films. The problem

is that there is really a surplus of production. And a quality level which is highly suspect. This changes again the way in which people think about marketing. Increased marketing and all sorts of increased marketing costs become the issue. It could become a vicious circle – higher costs for lower returns - that goes in the other direction: as more films come into the marketplace, more film distributors think more carefully about what the upside potential is for any film that they acquire, because they have to spend more money just to get visibility for that work. And the old idea that you get publicity out of being independent - you know, the critics that will help independent film or art film get out there - is a tough bet when 22 films are released that weekend. 22 in one weekend! And do you really want to make a bet that the *New York Times* or the *L.A. Times* are going to cover yours? You hope they will.

All the changes going on in the American distribution system one also sees when one looks at what is going on in Europe. The same things apply: a changing market place, a changing theatrical market place and an evolution of what the possibilities are.

American independent film has certainly changed from year-to-year and what represents success in that world changes constantly. A couple of years ago, *Fahrenheit 9/11* and *The Passion of the Christ* were the blockbuster independents. The two made \$100 million plus. And now we have the *Sideways* and *Napoleon Dynamite*-kind of film which emerged the next year. This year, *Brokeback Mountain*, *Crash* and *March of the Penguins*. Everybody is asking "What is significant about all of this?" One thing that is significant about it is the kind of energy inside the American independent world for creating prestigious, adult-oriented, relatively low-cost, high quality products. And that is not easy to create. As much as I agree with David Puttnam's clarion call yesterday for high quality films that speak to people's hearts, politics and sensibilities, it has always been one of the most difficult things in this industry to do, to really follow through with that level of quality. I will not give you the back stories of *Syriana* and *Capote*. But none of these films were looked at as "Oh, boy, these films are going to be highly successful". No-one sat out there saying "Oh, boy, this film is going to really break through". No. It was not going that way. And it still is not going that way.

European film is held back by the European film brand – the need for a break

So, the question that one is faced with is that you have an American independent model that is successful in large part because of its image of quality and success, regardless of whether or not its success is actually reflected in the box office. In all the conversation about European film, one looks and thinks about brand and one has to go back and say “OK. So what is the brand of European film?” And here is where I may come across to you as the American Philistine. Because, for me, the European brand is tied to a film culture that exists in Europe and does not exist anywhere else in the world. And it is a film culture of richness, of importance, of significance, and it is probably one of the biggest anchors you have holding back change in the industry.

For some reason, there are an awful lot of people here who still think that they are operating where they were 30 years ago, where the auteurs of 30 years ago are the same as the auteurs that are going to be presented now. And they are not. What is needed in this world is a platform for freshness, a platform for originality, a platform for emerging filmmakers. Every year, I try to find new filmmakers coming out of Europe, and it is a struggle. Because all I get are the Bellocchios and von Triers, you know, the auteurs that are established. But where are the new filmmakers?

I am not saying that first films aren't made. A lot of first films are made. But they are not getting the platform and the visibility and the accolades that the American independent works are being given. American independent work is being given accolades beyond its actual value. You can argue that there are critics who consider the films better than some of these films deserve; I am very cynical about filmmaking in general and the quality of it. But when you are in a situation in which Gary Winick is compared to Wong Kar Wai, Gary comes off not quite as the subject of conversation. So one of the arguments that one needs to make is whether or not that sense of film culture, which is such an important part of film art in what exists in Europe, is also one of the anchors holding back the revitalization that Europe so desperately needs. Because there needs to be a break. There needs to be a separation from the

past. That separation is happening everywhere else. It is happening in Asia. The American independent world was a separation from filmmakers. And in fact, the emergence of those film auteurs in the 1960s and 1970s was exactly that. They were an attack on the national film industries. The new waves were all new ways. One does not talk about new waves anymore. And, in fact, maybe the success of Dogme was in part based on the fact that it was a break from the past. Part mythology, part reality. But it was a break and there was a promise of something in the future. European film is held back as a brand as it centres itself in the past. And it centres itself in a film culture that is not relevant anymore.

I do not pretend to you that making breaks is an easy thing to do. But I do believe that film culture is in need of revitalization here which can only come from a generational change. One of the comments we have had in the US recently is that film critics are going to become a thing of the past. How many film critics belong to the 50-year old age group that doesn't have any voice? How many film critics are actually being supplanted by bloggers? Or by a kind of democratic voice? Just people saying, “Hey, I like these films”? And God, that scares the shit out of people of my generation. Oh, my God, do you actually read a blogger instead of me? I have studied film for 30 years! Of course, what I have to say is much more valuable than Harry Knowles. But Harry Knowles is becoming an important figure because he is able to talk about things in a way that relates to a generation that does not relate back to Pauline Kael. Trust me, I am not arguing to develop a European Harry Knowles. But I think there is a need for a change in generation and for a change in focus that allows for a platform, for a break from the past. If the industry here is in part trying to cultivate new audiences, one of the mistakes I would worry about is that it focuses too much on that over-30 generation. And I don't think we are in a position where we can simply say that the under-30 generation is something we shouldn't be talking to anymore. That is not to say that we don't deal with the over-30s. But we have to talk about film in a broad spectrum.

I know at least four definitions of American independent film, and two of them are circular. An independent film is a film that is done by an independent director, and a film

distributed by an independent company. An independent film in general is based on its source of financing. An independent film, the way it is talked about in the trades, is based on how many screens it actually appeared on. But what we really want to talk about when we talk about independent film is that it is creatively-driven and not commercially-driven. That is, work that has come out of a passion and creativity. And that is not sitting here saying, "Oh, God, this *Syriana*, we are going to make a lot of money with this." And so, if the ideas that one is going to talk at the ThinkTank are about branding and about the possibility for export and the understanding of how European film exists, well, consider with what European film is burdened at this point. And perhaps consider whether or not - without throwing the baby out with the bath water, without saying that there is no strength in the European brand - there is really a voice here that has not been heard for a long time. And a voice that speaks to us, to the change and the success that you guys are perhaps searching for and hopefully will find soon.



»The fact that you can't grow up in France without an understanding of who Jean Renoir is, who Stanley Kubrick is, who John Ford is, you know, the depth of film culture: that is a huge strength.«

Geoff Gilmore

Director, Sundance Institute



»Everybody is afraid of the arrival of the telcos but perhaps it will be great that the telcos invest in cinema, in diversity, because they have a lot of money. They can compete.«

Frédérique Dumas-Zajdela

Producer & President of the Agreement Commission, CNC, France

The work in Copenhagen

WORKING PAPERS**Working Group 1****Raising expectations:
the objectives and impacts of film funding****Introduction**

- Dynamic of the Group
- Objectives of the Group
- The three sessions
 - Confronting the Ministry of Finance
 - Confronting the new market opportunities
 - The Long tail
 - Conclusions

Why should citizens care about cinema? (1)

- Societal arguments
 - Culture – expression of local cultures / diversity – justify special rules (telling our own stories to ourselves and others)
 - Educational
 - European Values
 - Socialcohesion / popular / accessible
- Economic arguments
 - Part of the creative economy / growth industry / employment
 - Less dependant on imports / tradebalance
 - Promotional / Tourism

Why should citizens care about cinema? (2)

- Measures of success
 - Films lead societal changes
 - Tool to address social issues, promote values, support policy goals
 - Help to drive the technology shift / creativity
 - Give a nation influence / visibility

Towards new business models (1)

- Challenges
 - Film financing and licensing
 - Rights management
 - Information
 - No policy
 - Access and visibility
 - Standardisation
- Opportunities
 - New creative output
 - Break the Hollywood rules
 - Direct engagement with audience
 - New revenues
 - The Longtail

Towards new business models (2)

- What is required to adapt?
 - Hold on to the rights – territoriality issue
 - Rights management – indiv. vs collective
 - Analyse rights' commercial value
 - Market data / customers behaviors
 - Adapt film support rules
 - Understanding the technology, the new distribution services and the new audiences

Towards new business models (3)

- How should filmpolicy evolve – principles?
 - Education curriculum
 - Accomodate new practices (constraints)
 - Support experiments / flexibility
 - Make Internet support pan European distribution
 - Support commercial licensing and negotiations
 - help create a diverse, competitive market
 - Market data / information / feasibility studies
 - Support newcomers in distribution
 - Support tools to enable finding films (search engine)

Proposals

- Seed money to support rights management organisations on a pan-European / global basis (dk-spain-czech).
- European fund to actively assist a global distribution plan using new technologies (7thFP).
- Funding to help knowing the new audience / assess communities / digital market knowledge
 - To help financing (presales)
 - To consider distribution strategy
- Information portal / search engine (Quaero initiative)
- Review national support schemes / legislation

Working Group 2**Realising the “brand value” of European film****Outcomes**

The increase of consumption of non-national films in Europe (also known as “European” films or “specialised” films).

How can we achieve this objective through policy initiatives?

Content

Can the creation of a “brand” or, better, can a “branding activity” contribute positively to the achievement of this outcome?

And if so, what must be the features of a branding activity related to the film industry?

First of all, we need to better understand what is branding in the common sense*.

Then, we shall ask ourselves what we can imitate from traditional branding in general trade and consumer goods and apply it to cultural products (like films) in a changing environment?

In order to do so, we must understand the elements that contribute to the branding activity:

- Products
- Audiences
- Distributors

Core Importance: the audiences (presentation of study)

A branding activity applied to films: the practice:

- Distribution
- Promotion
- Exhibition

* (What is branding? Is brand important? Is it really useful? Branding in the USA has been extremely important. Can we do the same?)

Analysis of case studies

1. Distribution. The “European” distributor’s point of view. A distributor who has dealt with multiple territories with success:
 - a. What films?
 - b. What policies?
 - c. What strategies?
 - d. What problems?
 - e. Does brand exist?
 - f. Was it used in the success studies?

Is there anything that can be identified as a European Brand?

2. Promotion. The role of festivals. (Is Rome Film Festival a business model?)
 - a. do festivals increment the circulation and consumption of non national European films?
 - b. The dichotomy of the branding activity for festivals: the event in itself vs films in general
 - c. Branding and the need of coordination between festivals
3. The Exhibition sector’s point of view

The issues of a “European” cinema network (Europa Cinemas)

The changing environment: the evolution of the distribution sector. What are the outlines of such changes? How will that be affecting the branding activity applied to films? What are the opportunities and what the threats to be considered at this stage?

The policy making activity: is there anything to be done to increase the consumption of non national European films in Europe? How can the policy maker interact with the market without distortions?

Provocation: will the elimination of support to the distribution sector from the European Commission enable a “natural selection” of distributors in Europe, enhancing and enforcing the structure of the sector in itself? Shall the intervention focus on the new distribution and marketing activities required by the changing environment?

Conclusions:

1. The Distribution structure in Europe is problematic.
2. You need a film industry to make a masterpiece but you need commercial films to make a film industry.
3. The application of Branding activity to the film industry is viable
4. The “European” brand exists only in the American market
5. The recognition of the product “non-national European film” has to be carried out beyond “local” boundaries.

Working methodology:

Presentation of principal issues: slides on main outlines

- What is branding
- How branding applies to Europe
- Strength and weaknesses
- Opportunities and threats

Preparation of a one page summary of main outlines and outcomes to be reached

Presentation of two case studies
Open discussion.

Implementation of main contributions.
Conclusions

Branding & Brand Management: a quick primer

1. Who decides a brand?

*“Your brand is created out of customer contact and the experience your customers have of you”
Stelios Haji-Ioannou, chairman of the EasyJet Group*

2. The basis for a strong relationship

Trust

- Consumers believe that the brand will deliver its promise, respect them, and be open and honest with them

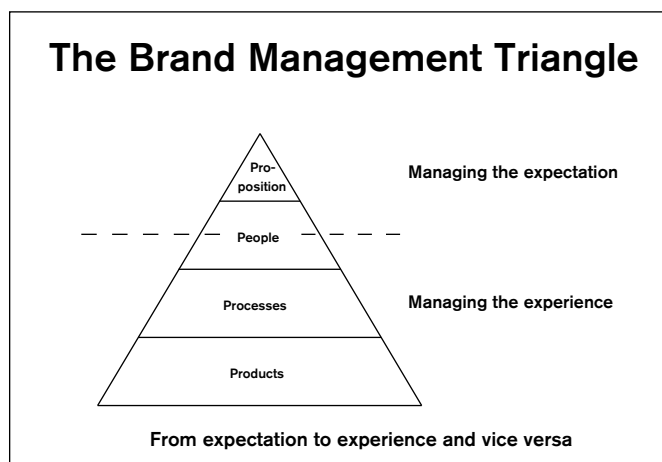
Commitment

- Consumers feel some longer term emotional attachment to their relationship with the brand

Alignment and mutuality

- A two-way affinity between consumers and the brand; with mutual respect, shared values and expectations met – which results in a continually rewarding experience

3. The Brand Management Triangle



4. The Four P's of Branding

Proposition

- Successful brands begin with a clear proposition.
- Unless a brand has a clear idea of the value it brings and to whom, it will have difficulty in ever making the brand stand for anything distinctive.

People

- They represent the point at which customers finally interact with the brand: they are the means to bring the brand alive
- Train employees to deliver experiences that uniquely fit your brand promise

Process

- *"It has always seemed to me that your brand is formed, primarily, not by what your company says about itself, but by what the company does"*
Jeff Bezos, CEO of Amazon

Products

- Brands are now emerging that create experiences connected to the purchase or the use of a product: they offer value to the customer that goes beyond the product alone. This value becomes synonymous with the brand
- A branded product is the "totality of the experience"

5. Auditing The Brand Platform

Brand positioning

- How can the brand be positioned with clarity and precision?

Brand naming

- Is the name for the brand distinctive, and does it create the right emotional associations?

Brand architecture

- How should the brand (or sub-brands) work to communicate the proposition?

Brand identity

- How can the brand best be portrayed, visually and verbally?

6. Auditing the Customer Experience

Proposition

- How clear is the offer and what does the brand promise? Is this valuable to target customers?

People

- To what extent do people behave in a way that meets customer expectations and delivers the brand promise?

Processes

- Do processes create value for customers and deliver the brand promise?

Products

- Are products differentiated and valuable to target customers?

7. A Necessity for Ruthlessness

The Company as a dictatorial entity

- In the commercial sector, it is openly acknowledged that a certain amount of heavy-handedness has often proved essential to achieve the kind of ruthless adherence to strategy which companies need to build their brands.
- This is understandable, since so much of the success of any branding venture is attributable to the degree of consistency the company manages to achieve in its internal and external communications

Branding in an open environment

- We know from experience that getting many independent people and organisations (all with very different interests, opinions and agendas) to speak with a single voice is hard thing to achieve through consensus.
- ...unless a [coordination] can find a way of achieving in its committees the same single-minded sense of purpose and control that the crazy brand visionary achieves within a privately owned company, a [...] brand programme is guaranteed to fail

Working Group 3

Cohesion: driving success all along the value chain

Key question: How do we create the conditions for a thriving film sector?

Cohesion

“Cohesion” describes the strategy for creating and strengthening a film sector in which all the elements for success reinforce each other: identifying and developing ideas, along with the talent required to bring them to fruition; the structures and organisations in which that talent can work effectively; the material resources to sustain the talent. “Cohesion” is associated with “critical mass”; critical mass relates not only to the quantity of activity and opportunity but also to the ability to maintain that activity and opportunity over time.

We assume that the necessary elements of the cohesion strategy include effective training, stable and well-funded companies, a dynamic and diverse market, both nationally and internationally. This does not mean that film life only exists in the commercial mainstream. “Art-house films” – the kind of films George Lucas says will be the only films in ten years’ time – can be commercial, in terms of being able to be financed and to earn enough profit to sustain the business. The problem we face in Europe may even be that there are not enough of these kinds of films to build the audiences, the market or the companies that produce and distribute them.

Successful European Film Companies

One definition of a successful film company is that it has ability to take a risk and to wait until the risk comes good. It has the means to invest in ideas and in talent. It can afford the failures and it can capitalise on success (i.e. it can keep the upside). But, crucially, such a company is not just betting and hoping, but has a clear vision, for which it can take responsibility, of what it has to do to succeed .

Supporting companies or supporting films?

Success here is defined as durability; the key questions to be addressed are:

- What has enabled you to do so well for so long?
- In what ways has public support been useful?
- What else is needed – including from public funding bodies?

Case Studies of successful European Film Companies

Working Group 3 will involve a series of case studies of successful European film companies, presented by the people responsible for that success.

- The case studies are: Ciné B, Zentropa.

Through the lens of these case studies, we want to draw lessons about what the success factors are, how the actions of public funding bodies and the support they provide are contributing to that success.

We want to explore how successful companies can develop ideas and talent and make (market, distribute, exhibit) successful films, rather than just how successful films can make successful companies.

European Film Companies:

Size, professionalism

- Do film companies have the means to operate effectively?
- Does size matter, and are the companies big enough?
- Do they benefit from the right level of professionalism?
- European Film Companies: Continuity/sustainability
- Do they enjoy enough continuity?
- If so, what are the conditions that have made continuity possible?
- If not, what are the conditions that are lacking?
- Do they have sufficient access to finance?
- What can the funds do to improve the operating conditions for companies?
- Is access to distribution sufficiently smooth for European producers?

Issues

- What are the lessons to be learnt from companies that have achieved long term success?
- What is the relative importance in that success of continuity, skills, professionalism, size, access to finance and access to distribution?
- Does the film sector have appropriate career paths? Are there the right links with film schools?

Cohesion

- What are the respective roles – of film companies, film schools, film funders and financiers – in the development and maintenance of a thriving film sector?
- What is the relationship of building a thriving film sector to the development of talent?

Film strategy

- For a national or regional film strategy to be successful, how critical is success in any part of the value chain?
- What is the relationship of a successful national or regional film strategy to the success of European film as a whole?
- What are the terms of success and how is that success gauged?

Talent

- Is the talent there? Is the funding system accessible to talent? Is talent retained and developed by the funding system?
- What is the relationship between what the talent wants and what funders want?
- Is the writer/director trope of European cinema an advantage or a hindrance?
- Is the talent there? Is the funding system accessible to talent? Is talent retained and developed by the funding system?
- To what extent does talent need to understand what is the meaning and purpose of subsidy?
- What is the relationship between what talent wants and what funders want?
- Does the film sector have appropriate career paths?
- Are there the right links with film schools?

The business model

- R.O.I ? Huge operating margin? Low cost producers? Is there a magic business model?
- Ability to build a library of rights belonging to the company. Still a good indicator?

Some observations

- Commercial does not equal mainstream
- The return on capital of art-house films is good.
- The problem is that there are not enough of this kind of films to build audiences, the market and the companies that produce and distribute them.

Some thoughts

- What will be the effect of technology on creating a trans-national Euro market for European films
- Entry of telecom companies into the market
- 3.4 million down-loads for Tanneg in Switzerland (Free!)
- Effect of TV on history of film
- Judging success: Is it prizes or Box Office or so-called Ancillary rights or critical success?
- Miriam Margolis: I read 27 million BO, where's my share?
- The high cost of independent distribution v Hollywood's distribution
- Changing of the structure of society/marketplace particularly age
- First time more over 30's going to cinema than under 30's
- More young people staying at parental home for longer
- Populations more diverse and more recently settling. In some cities (Birmingham for instance) the so called minority will become the majority in just a few years and already the city with highest proportion of young people
- Where does Europe go between its existing mainly cottage industry and the industrial model
- What would citizens (i.e. potential cinema-goers, actual taxpayers!) want? How can they express it through the politicians

- What do the politicians want? Less public support? More public support? A restructuring of public support?
- What do we want?
- Build on our strengths
- What are our strengths?
- More sophisticated stories
- Stories that appeal to an older market place
- Stories whose appeal is greater for those that have a further education
- Stories using the great historical and literary heritage of Europe
- First time in Europe that the marketplace/societal changes (an aging population on the one hand and a better educated population overall) may match European film makers traditional strengths
- Policies selected by people who don't want people to go to the cinema
- First come policy, then the industry
- Word of mouth no longer exists in theatrical but it does exist on internet
- Scarcity in cinemas in DVD shops in TV
- Digital open space
- Don't ignore visionaries, individual visionaries, allow them to lead
- Prescriptions for recovery
- Focus the industry on European strengths rather than shoring up weakness' and structure public funding to build on these strengths
- Support the successful companies while allowing new successful companies to emerge and learn from their business models
- Don't be obsessed the dwindling youth market but rather focus on the older audience and the educated audience and the recently settled in Europe audience
- Use but do not be obsessed by the new technology

Prescriptions for recovery

- Learn from and act on the successful models of public funding in Europe (if we can agree which are successful)
- Agree that BO and ancillary revenue success are a bigger priority for cinema than maintaining Europe's diversity, Prizes or festival success or any other measures of success. Transnational BO and ancillary revenues to get extra brownie points!
- Find an industrial model that both works for Europe and is politically acceptable like Airbus did 30 years ago
- Even more questions!!
- Size is not everything! Small can still be beautiful!
- Is like putting a strawberry next to a fish
- Is European Film as erratic and as great a failure as US independent film
- Are we Europeans comparing ourselves to the wrong industry (i.e. Hollywood v US Indie business)
- Are we Europeans in the wrong business (cottage rather than industrial?)?

Working Group 4**Why support co-production?****Background:**

Today co-productions are mainly driven by mere financial necessity while natural co-productions driven by creative and/or technical reasons are the rare exception. With less financing available from the market sources, producers aim for maximum access to the various sources of public financing be it selective, automatic or fiscal support in different territories.

The objectives pursued by national and regional public funding bodies underpinning such selective, automatic or fiscal support with respective terms and conditions vary as much as they often overlap. The most common main objective – to sustain a national/regional film industry – is becoming increasingly important to justify such support politically on a national level safeguarded by nationality and/or local spent requirements embodied in funding regulations and co-production treaties (or their increasingly restrictive interpretation).

But with co-productions where there are two or more public funding bodies involved it may be that the main objective to support films that people get to see gets lost in the struggle to meet the objectives to strengthening the capabilities of the national and regional film industries.

The successful impact of public support is often only measured by effects on a strictly national/regional level. Therefore co-producing can have a negative impact on the artistic quality of a film.

However the main objective should be the production of better films which more people get to see and hence in the long term a more sustainable industry allowing filmmakers to benefit from producing successful films.

Issues:

What is/makes a good co-production?

Is the “Europudding”-discussion to be reopened?

Why do co-productions tend to work less well in the market place (in terms of audiences in the majority co-production partner’s country/the minority co-production partner’s country/sales to and audiences in other countries, relative to 100% national productions)?

Imbalance of co-production relations between territories.

Co-production vs. co-financing vs. production services with fiscal incentives?

Are financial co-productions not more straightforward than a classical co-production with artistic and/or technical co-operation?

How do the various different strings of each public funding body affect: film-makers’ responsibilities, the public funders’ responsibilities and the quality of the films?

How to reconcile the interests of small-country and big-country funders?

Impact of automatic funding schemes (reference funding or fiscal incentives), especially on co-production.

How can automatic funding schemes be made stable?

Approximately 80% of all public funding – including tax incentives – is distributed by automatic systems. Is it healthy that there is little or no link between investment/investor and project?

Working Group 5

Decision-making in funding

Public film support in Europe today can be divided into two main categories: automatic support (divided into spend-driven and success-driven), and selective support (divided into commission decisions and individual decision-makers).

Most support systems abide by more or less the same basic principles: to build a sustainable film industry and to promote film culture. Many systems also have the ambition of adding value to the projects through their intervention.

Yet the results of the films and market shares show very big differences from country to country. The challenge facing this group is to examine to what degree this has to do with differences in how the schemes are run in practice, and the possibilities of adjusting the schemes to better achieve the main goals established for the systems.

Through a frank and open-minded presentation of a number of country case studies, we hope to get inspiration from some of the best practices in Europe and to evaluate what would be worth considering changing in the current national practices.

The examination of the cases will include

- A survey of how the systems actually function: objectives, operation, results/ achievements
- How is the success of the films evaluated: reviews, audience, distribution effectiveness (number of prints), DVD sales, television, foreign sales?
- What works and what does not?
- What would the decision makers want to change and to what effect?
- What are the opinions of the film environment – the receivers of support?
- What do the politicians think about the support systems, are they satisfied, are some systems under attack or threat, are there taboos that are dangerous to allow out into the open?
- What are the options for changing the existing systems or for protecting the valuable aspects?

The working group will also deal with how the support systems can be optimised and raise a number of provocative and taboo questions for debate:

- Is it a purpose for the funds to limit the risk for the public money – or to protect the money (i.e. use it meaningfully and purposefully) in order that it is not lost?
- Is selective support more effective than automatic support because it brings quality criteria to the evaluation process?
- Is it a condition for a successful selective system to have decision-makers who have experience in the artistic and film production process?
- Are big production companies better placed to put in place strategies to develop projects, does film need more of an industrial structure?
- How frequently do directors need to make a film in order to develop professional skills, and do the decision-makers take this into consideration?

DATA AND ANALYSIS

Data and analysis prepared for Copenhagen

TRANSPARENCY, INFORMATION AND THE EVALUATION OF PUBLIC SUPPORT FOR FILM AND AUDIOVISUAL WORKS IN EUROPE

Contribution to the ThinkTank by

André Lange*

On the methodology of a comparative evaluation of film policies: the need for information on the complex European film policy landscape.

The main objective of the ThinkTank is “to examine why and how we use public funds to support film, and how we could support film more effectively in terms of advancing public policy objectives and improving film’s artistic quality and its ability to prosper in the market place”.

Although Henning Camre and Jonathan Davis have invited me to join the Advisory Committee of the ThinkTank *intuitu personae*, it is difficult for me not to approach this issue from my professional point of view: that of an expert at the European Audiovisual Observatory with the intellectual requirements my statute implies (the duty of reserve, of neutrality and of abstention from the setting of standards).

However, my prudence in relation to this topic is motivated not merely by my statute but by the complexity of the subject itself. We all know,

that in the current period, the question of how public funding is organised is a highly political issue with regular debates between the European Commission on one side, and national governments, films agencies and professional organisations on the other. From time to time academic economists and various political groupings may call into question the legitimacy of this kind of public support, thereby rendering public debate on the issue relatively difficult. Any in-depth questioning of the legal basis and *modus operandi* of public support schemes, any critical analysis of a particular failure, any misinterpretation of statistics may turn into radical attacks or inform paranoid attitudes.

Finally, as co-author of one of the (relatively) few recent comparative studies on film funding in Europe, my main observations will be on the heterogeneity and complexity of the topic, a complexity that cannot be treated only with brilliant theses in Lutheran or post-Feuerbach style neither by ticking yes/no choice questionnaires but which requires patient work in order to compile a marquetry of information, aiming to describe with accuracy and nuance the complex European landscape of film policies.

Before theorising and before celebrating the success of one particular national model, one needs detailed and precise information on the legal framework, on the underlying economic organisation and on the cultural context of the film policies of the neighbouring countries.

Since the beginning of its activity, the European Audiovisual Observatory has undertaken this task of information on film policies and provided some tools for analysis:

- two comparative reports have been published on public support schemes (1998, 2004);
- various legal reports have been published on topics such as the legal basis of public funding, film support within the WTO framework, broadcasters’ obligation to invest in film production;
- three databases with direct relevance have been set-up: the KORDA database providing a systematic description of almost 200 funding bodies with more than 600 funding programmes; the IRIS-MERLIN database proposing abstracts of legal developments related to film policy and the LUMIERE

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As agreed both with the direction of the European Audiovisual Observatory and the organisers of the Think Tank the participa-

tion of André Lange is in a technical capacity only. In conformity with the statute of the Observatory, neither André Lange nor the Observatory are committed by the documents, reports and eventual recommendations of the Think Tank.

database compiling the admissions figures for almost 14,000 films with commercial release in Europe since 1996.

- Statistical publications such as the Yearbook, the FOCUS and various ad hoc reports have provided systematic information on the European film market and on the success of European films;
- A complementary work of co-ordination and (where possible) of harmonisation of the process of film industry market data compilation and collection has been undertaken in collaboration with the European Film Agency Researchers Network (EFARN), a network born in the framework of the network of European Film Agencies Directors (EFADs).
- A report on support for the international promotion of films has also recently been published on our website.

Comments of the ThinkTank on the qualities and weaknesses of the Observatory's contributions for the comparison and evaluation of film policies will certainly be useful for the improvement of our 'European film information policy'. We are certainly ready to take advice from the ThinkTank in order to improve our work and make it even more useful for professional and public executives.

Rather than celebrating our achievements, I would like to take the opportunity of the ThinkTank

conference to underline two current weaknesses of the Observatory in the field of monitoring film policies, but also to analyse a deeper, structural problem that we are facing in collecting reliable information necessary for the assessment of the efficiency of public policy.

Two current weaknesses of the Observatory as illustrations of the weaknesses of 'European film information policy'.

These two weaknesses are directly related to staff problems outside of the control of the Observatory Secretariat:

- In 2003, the Executive Council of the Observatory adopted the 'Porvoo decision' recognising the need for the Observatory to reinforce its capacities by appointing one expert in the field of fiscal law (with the clear objective of monitoring the growing importance of fiscal incentives) and one expert in the field of new technologies. For budgetary reasons, this decision has not yet been implemented, making it impossible for the Observatory to publish a long-awaited reference report on fiscal incentives or an in depth analysis of the impact of digital technologies on the value-chain of the film industry.
- In 2005, the General Secretary of the Council of Europe (of which the Observatory is a body) implemented a moratorium related to job classifications.

A direct consequence of this moratorium on the composition of the Observatory's team is that the up-dating of the KORDA database is in stand-by since March 2006 and will remain so for several months. As a consequence, the publication of the up-date of the Public Funding report will have to be pushed, at the next, back to the end of 2007.

In illustrating those two current weaknesses of the Observatory, I am not just defending my own wicket: these two examples are just an illustration of how an 'European film information policy' is still fragile, notwithstanding the number of conferences, consultancies, commissioned studies, databases and other publications supported with public money at the national or at the European level. The fragmentation and the redundancy of 'public film information policy' in Europe is certainly one of the numerous weaknesses of the industry.

Transparency issues

A problem of a more structural nature is certainly the lack of transparency of the European industry in general, and in particular of the production branch. In an ideological context where public support to a specific industry has increasingly to be justified, the lack of transparency of part (but not all) of the film industry may raise a serious problem for the legitimacy of the public support.

I am well aware of the specific economic nature of the cultural industries and I do not and would not wish to criticise the argument of cultural diversity, conceived to defend the legitimacy of public support to the cultural industries. A large part of public support to the film industry is motivated by cultural arguments and, in this case, cultural criteria should lead the evaluation and economic indicators should not be of first relevance.

Nevertheless, we have to recognise that the legal basis of the public support in the larger European countries, as well as the MEDIA Programme of the European Union, are also motivated, and legally organised, as industrial programmes. A correct economic analysis is then needed not only for the assessment of the opportunity of specific support measures but also to defend the economic legitimacy of public support to a supposedly fragile industry.

When the objectives are mainly industrial, the criteria of evaluation and the indicators used should of course mainly be of an economic nature and statistical indicators should probably be the primary tools of analysis. Precise analysis of the balance of payments, of the added-value to GDP, of the branch's profitability, of the number of jobs created, data on the number of companies, jobs and market shares would be needed.

With twenty years or so of experience of data collection at a

European level, I can assert the following: not a single European country, even France, has a complete statistical apparatus allowing a comprehensive evaluation of the economic significance of the film industry and, in particular, of the impact of the public support.

This absence of a comprehensive set of economic indicators may be partly explained by the specific and complex economic nature of the film industry, which makes the establishment of coherent data collection particularly difficult. But those methodological difficulties do not explain everything.

One may really question the willingness of part of the industry to cooperate in the economic transparency of the sector, and I am not referring only to the traditional *fin de non recevoir* advanced by the MPAA in response to some of our information requests. As long as leading companies in major markets do not accept a minimum of transparency in relation to their economic activities, they make the in-depth economic analysis of their national and, as a consequence, of the European market almost impossible.

We put the finger here on a puzzling contradiction. Even when justified by economic objectives, public support is allocated, in most cases, to individual projects, not to companies. It seems rather easy for a producer to demonstrate that without the public support, the effectiveness of an individual project (related to a specific work) would be impossible.

Public support is then an accumulation of micro-economic decisions, but the macro-economic analysis of the effects of the support is very often impossible, in particular when related to support to production. Four years ago when I presented to the Observatory's Advisory Committee the results of a statistical analysis of the financial statements of more than 2,500 film production companies, demonstrating that the average profit margin was around 0%, the representative of a producers' association noted that this kind of data could undermine the arguments in favour of the bankability of the industry and the willingness of investors to invest in production. A more in-depth analysis of our sample of companies lead us later on to a disturbing observation: a fairly significant number of production companies involved of the production of successful European films were not included in our analysis, for the simple reason that these companies do not disclose their financial statements, while at the same time drawing down important amounts of public support. We then stopped publishing data on the profit margin of production companies, supposing that our 0% profit margin was probably a bit too pessimistic and based on a biased sample.

On the same way that I am not arguing that public support should be attributed only to likely profitable films, I am of course not arguing that public support should be attributed only to companies demonstrating that they are not profitable. I am just

arguing, with the point of view of the citizen, that a requisite of the public support for economic objectives should be a minimum of transparency of companies' accounts. It means availability of audited balance sheet and profit and loss accounts, but also analysis of revenues. Managers of public funds will probably be unanimous in recognising that they lack precise information on the real producers returns on sales to TV and sales to video distributors. This is not by chance that the EFARN network has indicated the collection of data on the TV broadcast of European film and data on the success of European film on DVD as a priority objective for the Observatory. It is recognised that the LUMIERE database has largely resolved the problem of the assessment of theatrical success even if improvements would be necessary in the national box-office monitoring systems* and in the monitoring of non-European theatrical distribution. The problem is that the tracking of those data is a very expensive operation, undertaken in Europe by private companies of which the main clients are U.S. right holders. Again, it is interesting to note that while the US stakeholders are ready to spend a rather significant amount of money to monitor the European film market, European are rather shy in

their initiatives and often reluctant to mutualize them between Europeans.

Statistics are not everything

Of course statistics are not everything in the evaluation of film policies. At the Observatory, as important producers of film statistics, we are often concerned by the misuse of statistics in the evaluation of film policies with cultural objectives. Film statistics (in particular statistics on market shares by origin) are most often produced with economic criteria (the origin of the film being identified by the origin of the financing) and, of course, do not say anything about the cultural importance of the films.

If the objectives of a specific film policy are mainly cultural, the use of market statistics may be meaningless in the evaluation. The evaluation of the film policy in creating a cultural heritage, should not principally use statistics but answer to questions like: did the films we have supported contribute to the safeguarding of a minority language, did our support to distribution and exhibition make possible the access to film from other countries", did we allow older and experienced or young and unknown filmmakers to

explore ambitious, difficult and even extravagant manners of making films, with critical acclaim, but sometimes without popular success?

Again, this is commonplace. But, as far as I know, there is no current framework for the evaluation of the success of the cultural aspects of film policies. The strategy of expert reports for the assessment of national cultural policies (including film policies) undertaken by the Council of Europe in the 80's and 90's has been interrupted. It was however an interesting attempt to design such a framework and it may be worth revisiting this experience.

One of the interesting results of the *Survey of National Funds – Summary of Results prepared for the EFADs* by Jonathan Davis is the importance given to festival awards in the evaluation of film policies. Should the Observatory provide statistics on the breakdown of festival awards by origin of films to supply a new tool for evaluation? I am a bit concerned that such an approach would turn film policy evaluation in some sort of Soccer World Cup and I am even more perplexed when I realise that critical acclaim is not considered as an important element of the evaluation of the success of a film policy. In my personal view, this contempt of film

* In a significant number of countries no real monitoring system exists: distributors have to rely in the good faith of exhibitors, producers and right holders have to rely in the good faith of distributors and administrators of public funds have to rely in the good faith

of producers. The fact that the Observatory proudly announces every year a rate of 85% of coverage of admissions in the European Union for the LUMIERE database means also that there is a black area of at least 15%...

** Communication on satisfactory market shares for national films in a country may also hide tiny market shares for films from other European countries, raising the issue of the success of the support to cultural diversity in the country in question.

criticism by those responsible for film policy is probably as puzzling as the lack of economic transparency of the industry. Why should the often diplomatic and consensual choices of a festival jury be more relevant than the informed, passionate and often contradictory opinions of film critics?

The ThinkTank wisely raises the issue of the modalities of selective support. Who are the members of the commissions, what are their competences, how are they informed, how do they work? The Observatory has so far not investigated on this stimulating topic. As a consequence, I have no systematic analysis to propose. But, by experience, I can indicate that it succeeded that members of advisory committees of a funding bodies are not even systematically informed of the completion of films or audiovisual programmes they have advised to support, not to speak of information on the commercial or critical success of those films or programmes. And of course, very often they do not have the possibility of seeing the film or the programme they have advised to support. Without setting standards, I will just suggest that this is not sound practice. Again, absence of information encourages blind support.

Conclusions

The European Audiovisual Observatory will welcome any recommendations made by the ThinkTank in relation to complementary

information collection that may be considered as necessary to improve the process of evaluation of the film policies. We will of course continue our collaboration with the professional organisations members of our Advisory Committee, with the EFARN network, with the Cine-Regio network, with the executives of the MEDIA Programme 2007 and of Eurimages in order to provide them, in the limits of our capacities, the reliable information they need for the evaluation of film policies.

However, it should be underlined that the means and the manpower of the Observatory are limited (5 experts to cover economic and legal development in 36 countries not only in the field of film, but also of television and new media). The implementation of the 2003 Porvoo decision allowing us to recruit a specialist on fiscal incentives and one on the impact of new technologies for the audiovisual industry is not only an objective for the development of the Observatory: it is a challenge for a sound understanding of European film policies.

Finally the improvement of the transparency of the film industry in Europe should be considered a challenge for both public bodies and the industry if they wish to ensure the efficiency, but also, in the long term, the legitimacy of the various forms of public support.

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INFORMATION NOTES**Note 1****Public funding of production in Europe****Premise**

“All things being equal,” as the natural philosophers would say, we would expect that the richer the economy, the bigger the market for feature film; the bigger the market for feature film, the higher the level of public support for national film, and the higher the level of public support, the better the performance of national film.

All things, however, are not equal. We need to take into account what the European Audiovisual

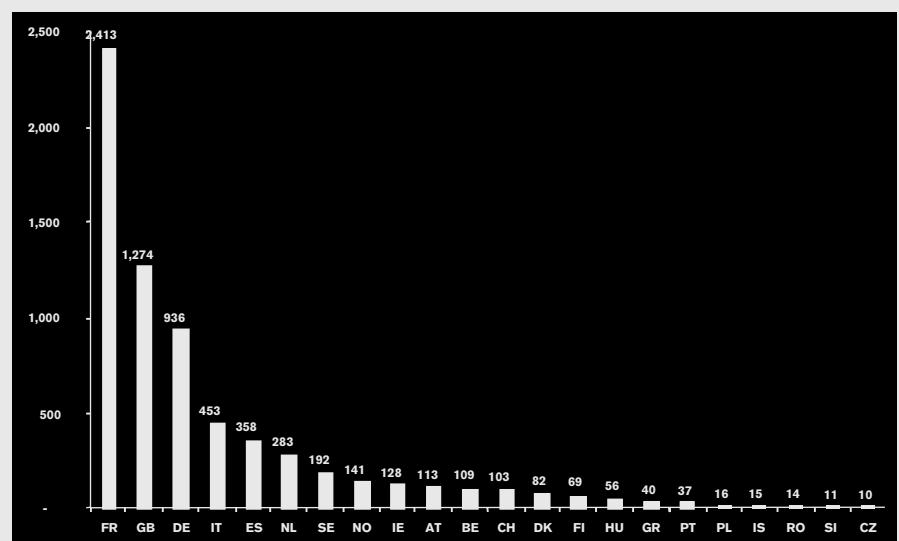
Observatory (EAO) termed in its 2004 report, *Public funding for film and audiovisual works in Europe – A comparative approach*, “the interacting political, cultural, aesthetic and economic factors which form the complex alchemy of film production [and distribution and exhibition, one might add].”

The following analysis aims to give a sense of just how different the factors are that we encounter in different European countries. The point of departure is the data compiled by the EAO. We have used as the basis of the comparison aggregate data for the five years, 2002 – 2005: this enables us to allow for the variation in the performance of the films from year to year. Unlike the EAO, we have included in the figures

estimates of the cost to the public purse of tax incentives provided for film. For two countries – Denmark and Portugal – we have used figures supplied directly by the national funding bodies.

In Figure 1, we see that, as a rule, the bigger the national economy, the greater the amount of public money devoted to film production, but there are exceptions: Germany – the largest European economy – spends less public money on film production than France or the UK; Norway and Ireland – two of the smaller economies – spend more than the larger economies of Austria, Belgium, Switzerland, Greece, Portugal and Poland.

Figure 1:
Funding of national production in 22 European countries for the four years, 2002 – 2005 (in €M)



Political and cultural factors must also come into play: in some countries, film may be considered to have a greater importance than in others and so receives relatively greater public support. One way of gauging that importance is by relating the level of production support to the size of the film market in the country (Figure 2).

The film market comprises cinema-going, the purchase and rental of films on video and DVD, subscriptions to film channels and the viewing of films on free TV. In Figure 2 we use cinema admissions as the imperfect proxy for the size of the film market. If the level of support was only a function of the size of the film-market, then the bars in Figure 2 would all be of the same height. The variation must therefore be a function of three factors: film's political appeal (which might relate,

in turn, to its importance for national culture, or the perception of film as a driver of economic growth, or its effectiveness as an instrument of foreign policy), the goals of film policy (that might be more populist – for national audiences to watch more national films – or elitist – to support the highest artistic endeavour independent of popular taste) and the efficiency of the support mechanisms themselves.

Factors that are intrinsic to the national economics of film production may also come into play. Films may be more expensive to produce in one country than in another, and film-makers may be more ambitious. Such factors would express themselves in the level of support relative to the number of films produced. This is shown in Figure 3 overleaf.

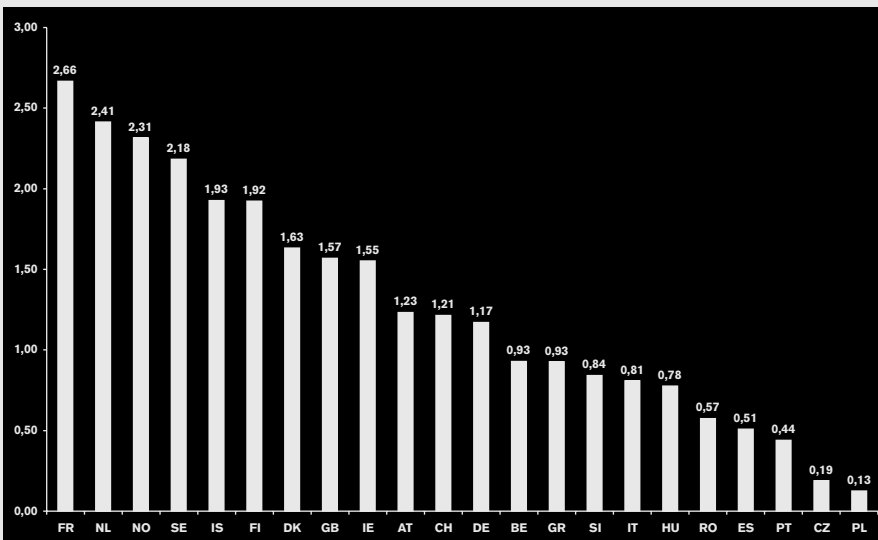


Figure 2: Production subsidies divided by box office admissions in each country, 2002 – 2005 (in €)

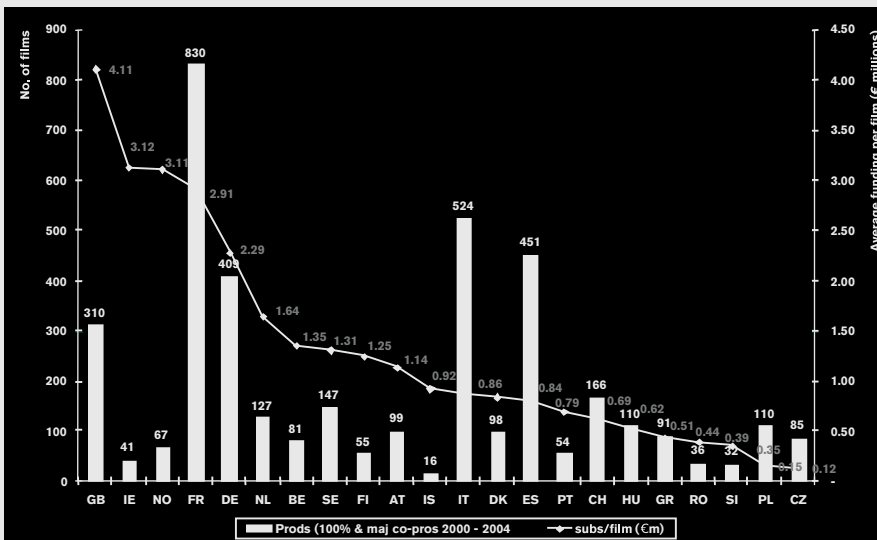


Figure 3: Number of films produced and the subsidy per film in 22 European countries for the four years, 2002 – 2005

The higher the level of the budget of the film, the greater the level of support. But the level of support may also relate to the need for public subsidy to fill the gap between the cost of making the films and the revenues they generate in the market

place (Figure 4) which relates the level of national production subsidy to the worldwide market for national films, using the number of admissions as a proxy for the market.

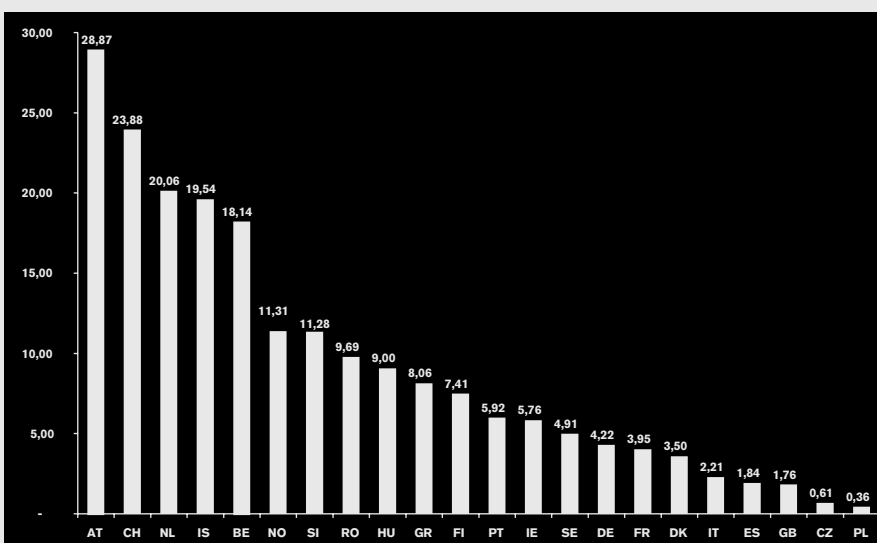


Figure 4: Production subsidies divided by worldwide box office admissions to films from each country, 2002 – 2005 (in €)

Note 2**Box office for European films**

The Copenhagen ThinkTank (CTT) sample of European films comprises 344 titles. These are the films produced or co-produced by a European company that were in the official selections of the Berlin, Cannes and Venice Film festivals

2002 – 2005, plus European films selected for Toronto in 2004 and 2005. Of these 344 films, 285 had been released on one or more of the 14 territories covered. The 14 territories are Argentina, Australia, Austria, Chile, Denmark, France, Germany, Italy, New Zealand, Spain, the UK and Ireland, and the USA and Canada.

257 of the 285 films were produced or co-produced by companies from one or more of the 14 territories.

Sources:
Estimates based on AC Nielsen/EDI data for all countries except for Denmark (source: Danish Film Institute) and Italy (source: Osservatorio Italiano dell'Audiovisivo).

Main nationality of film	Number of films in the CTT sample	Number of the 14 territories in which the film was released	National box office (\$)	Box office in the other 13 CTT territories (\$)	Total box office(\$)
Argentina	4	8	441,942	1,895,439	2,337,381
Australia	2	2	3,485,455	988,015	4,473,470
Austria	4	4	1,283,870	828,609	2,112,479
Chile	1	5	48,072	837,330	885,402
Denmark	11	14	12,490,730	16,020,926	28,511,656
France	95	14	266,870,734	195,171,012	462,041,746
Germany	30	14	146,535,938	75,277,323	221,813,261
Italy	29	13	54,561,381	8,610,804	63,172,185
New Zealand	2	3	1,631,266	782,984	2,414,250
Spain	15	14	53,875,335	48,814,090	102,689,425
UK	58	14	138,050,409	517,413,369	655,463,778
USA	6	14	57,187,586	34,491,384	91,678,970
Total	257		736,462,718	901,131,285	1,637,594,003

Main nationality of film	Average box office per film (\$)	Number of films as % of total	National BO as % of 14 CTT territories BO	BO in the other 13 CTT territories as % of total	Territory's share of the 14 CTT territories
Argentina	584,345	1.6%	19%	81%	0.1%
Australia	2,236,735	0.8%	78%	22%	0.3%
Austria	528,120	1.6%	61%	39%	0.1%
Chile	885,402	0.4%	5%	95%	0.1%
Denmark	2,591,969	4.3%	44%	56%	1.7%
France	4,863,597	37.0%	58%	42%	28.2%
Germany	7,393,775	11.7%	66%	34%	13.5%
Italy	2,178,351	11.3%	86%	14%	3.9%
New Zealand	1,207,125	0.8%	68%	32%	0.1%
Spain	6,845,962	5.8%	52%	48%	6.3%
UK	11,301,100	22.6%	21%	79%	40.0%
USA	15,279,828	2.3%	62%	38%	5.6%
Total	6,371,961	100.0%	45%	55%	100%

3 French films and their worldwide box office (in US\$)

The Copenhagen ThinkTank (CTT) sample of 344 European films released 2002 – 2006 has data for 14 territories. In this table, they are the countries marked in bold. For three films we have used Unifrance data to estimate the value of the box office in all the other territories in which the films were released. This gives a sense of the weight of the 14 territories in the global box office. We see that for an English-language film like *The Pianist* (Roman Polanski, 2002); the CTT sample territories represent 68% of the worldwide box office. For the two French-language films, the figure is 90%.

Sources:

The CTT sample data is derived from AC Nielsen/EDI. The data for the other territories is derived from Unifrance data.

Country	<i>The Pianist</i>	<i>8 femmes</i>	<i>Les choristes</i>
Argentina	526,057	213,231	329,790
Australia	2,814,013	676,514	361,508
Austria	295,615	905,390	153,349
Belgium	1,021,998	813,534	1,209,544
Brazil	2,270,568	317,862	102,165
Canada	1,064,647	453,281	1,864,447
Chile	197,724	11,499	111,985
Czech Republic	184,314		
Denmark	358,312	1,991,717	149,783
France	11,737,569	24,408,108	59,497,452
Germany	5,875,549	9,762,809	6,968,752
Greece	272,623	265,000	
HK	465,022	132,541	
Hungary	223,297		
Italy	5,768,534	2,589,403	1,172,645
Japan	26,398,227		2,692,588
Korea			535,294
Mexico	4,104,047	148,494	521,118
Netherlands	1,025,363	648,000	
New Zealand	765,062	26,905	183,965
Poland	4,044,292	689,097	
Portugal	469,006	207,100	
S Africa	48,290		
Spain	9,000,348	1,553,864	8,456,551
Sweden	958,684		310,588
Switzerland	1,063,014	2,024,668	2,199,016
Taiwan			208,914
Turkey	570,472		
UK	5,115,386	1,013,033	1,845,443
US	32,543,588	3,098,776	3,635,164
Total, CTT sample	81,372,372	46,717,604	83,489,671
Total, other territories	37,809,249	5,233,221	9,020,392
Global total	119,181,621	51,950,825	92,510,063
Total, CTT sample as %	68%	90%	90%

Note 3**Producers of European films**

Of the 344 European films in the Copenhagen ThinkTank (CTT), 283 had been released on one or more of the 14 territories covered. 253 titles were released outside of their home territory. There were 275 main producers. 40 of the production companies had two or more films released. Collectively they accounted for 106 titles (37.5% of the titles released) and \$627.8 million of the total box revenues (37.8%) and \$349.2 million (39.1%) of the revenues outside of the films' home territory.

This is a much lower level of concentration than is encountered amongst the sales agents of the films (see Information Note 4).

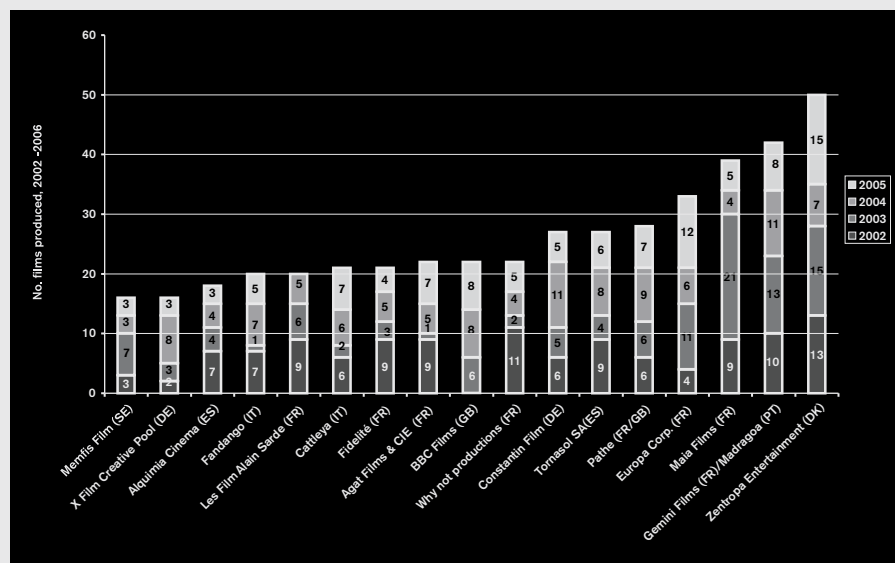
Production company	Country where based	No. of titles	Total BO (US\$)	Box office excl. home territory (US\$)
Simon Channing Williams	GB	2	76,817,582	62,103,951
Fidélité	FR	3	69,260,566	42,836,008
Constantin Film Prod.	DE	2	84,895,040	40,905,225
X Film Creative Pool	DE	2	74,266,368	32,956,917
El Deseo	ES	3	42,139,603	31,825,973
Pathe Features Ltd	FR	2	30,365,848	21,151,307
Les Film Alain Sarde	FR	5	31,068,773	16,917,802
Zentropa Entertainment	DK	5	22,003,881	15,167,130
Sixteen Films	GB	2	14,170,310	11,918,313
BBC Films	GB	2	12,765,421	11,335,477
Les films du Losange	FR	2	13,109,077	9,929,352
Europa Corp.	FR	2	14,244,087	6,298,487
Revolution Films	GB	5	10,477,087	5,863,486
Les Films du Fleuve	BE	2	5,737,719	5,737,719
Serendipity Point Films	CA	2	13,866,334	5,255,758
Why not productions, Paris	FR	2	11,896,414	4,415,386
MK2 SA	FR	4	9,647,656	3,448,496
Granada Film	GB	2	3,104,316	3,095,562
Diaphana Films	FR	2	5,351,954	2,628,771
Agat Films & CIE	FR	4	5,976,732	1,910,275
Gemini Films	FR	4	4,855,757	1,640,580
Fandango	IT	7	6,373,221	1,570,160
Peter Rommel Filmprodukt-	DE	2	8,879,580	1,557,947
Filmalbatros SRL	IT	2	7,985,200	1,525,950
Mille et Une Productions	FR	2	3,029,789	1,120,613
Azor Films	FR	2	2,550,757	937,087
Claussen & Wuebke	DE	2	3,210,909	832,676
coop 99 Filmproduktion	OS	2	918,237	826,395
Nicola Film	RU	2	680,051	680,051
Vertigo Prod.	GB	2	5,341,469	679,452
Rezo Productions	RU	2	2,199,685	665,490
Pierre Grise Productions	FR	2	1,796,126	633,982
Haut et Court	FR	4	1,491,838	310,240
Maia Films	FR	2	1,051,597	274,774
Cattleya	IT	4	15,537,239	103,592
Alquimia Cinema	ES	2	4,336,738	86,660
Memfis Film	SE	2	46,719	46,719
Column Productions	NL	2	2,409	2,409
Nordisk Film Productions AS	DK	2	582,292	2,009
Tesela Producciones	ES	2	5,779,002	-
Total		106	627,813,382	349,198,182

Of the 40 producers responsible for two or more of the released titles in the CTT sample of 344 European films in the official selection of Berlin, Cannes and Venice, 2002 – 2005 and in Toronto, 2004 and 2005, 17 made 16 or more films over the period (2002 – 2005).

Production company	2002	2003	2004	2005	total no. titles 2002 – 2005
Agat Films & CIE (FR)	9	1	5	7	22
Alquimia Cinema (ES)	7	4	4	3	18
BBC Films (GB)		6	8	8	22
Cattleya (IT)	6	2	6	7	21
Constantin Film (DE)	6	5	11	5	27
Europa Corp. (FR)	4	11	6	12	33
Fandango (IT)	7	1	7	5	20
Fidelité (FR)	9	3	5	4	21
Gemini Films (FR)/Madragoa (PT)	10	13	11	8	42
Les Film Alain Sarde (FR)	9	6	5		20
Maia Films (FR)	9	21	4	5	39
Memfis Film (SE)	3	7	3	3	16
Nordisk Film Productions AS (DK)	14	18	12	14	58
Pathe (FR/GB)	6	6	9	7	28
Tornasol SA (ES)	9	4	8	6	27
Why not productions (FR)	11	2	4	5	22
X Film Creative Pool (DE)	2	3	8	3	16
Zentropa Entertainment (DK)	13	15	7	15	50
Total	80	90	70	64	304

Collectively, the 17 companies accounted for 291 titles, roughly 10% of European film output over the period. Eight of the companies were French-based (including Pathé), two were based in Germany, two in Italy, one in Spain, one in Sweden, one in the UK and two in Denmark; the two with the most titles were Danish.

Source: analysis of IMDB data



Note 4**Sales agents of European films**

Of the 344 European films in the Copenhagen ThinkTank (CTT), 283 had been released on one or more of the 14 territories covered. 253 titles were released outside of their home territory.

Sales Agent	Nationality of sales agent	Total no. of titles sold	No. of titles sold excl. home territory	US\$ BO Total (14 territories)	US\$ BO Total (excl. home territory)
Pathé Pictures Int'l.	FR	11	11	153,851,851	70,653,878
Dream Works	USA	1	1	153,378,082	97,267,186
Studio Canal	FR	9	9	138,907,608	96,077,074
Celluloid Dreams	FR	25	24	129,904,956	77,277,019
Miramax	USA	4	4	115,411,370	62,342,551
Focus Features	USA	5	5	111,677,501	90,312,047
Bavaria Film International	DE	17	15	110,197,538	51,087,513
Warner Bros.	USA	1	1	93,314,529	39,955,417
EOS Distribution	DE	1	1	67,170,435	37,104,903
Wild Bunch	FR	21	20	63,384,865	40,013,956
Flach Pyramide International	FR	21	21	47,262,632	26,692,904
Sogepaq	ES	3	2	47,128,746	13,663,769
The Works	UK	16	15	37,304,809	24,097,467
Universal Studios Group	USA	1	1	33,697,359	13,741,761
Kigali Films London	UK	1	1	31,262,451	28,512,445
Columbia Tristar	USA	1	1	29,037,711	6,619,511
Trust Film Sales	DK	8	8	22,736,082	15,757,710
Lakeshore Int. Entert. Group	USA	2	2	20,584,702	10,502,185
Beta Cinema	DE	3	3	18,295,143	3,899,185
TF1 International	FR	4	4	18,114,882	3,676,855
Icon Entertainment Int.	UK	2	2	16,769,573	5,641,313
Europa Corp	FR	3	3	14,905,161	6,410,754
Les films du Losange	FR	3	3	14,044,853	10,071,425
Summit Entertainment	USA	2	2	13,866,334	5,255,758
Capitol Film	UK	2	2	13,653,445	5,938,932
Rai Trade	IT	4	2	11,124,315	770,470
Films Distribution	FR	8	8	9,657,223	2,816,880
MK2	FR	5	5	9,655,732	3,410,455
ARP	FR	2	2	9,633,502	1,721,082
Odyssey Entertainment	UK	1	1	8,091,792	6,979,844
Element X	UK	3	2	7,556,246	6,423,920
Cinepool	DE	1	1	7,352,884	1,513,226
Gemini Films	FR	6	6	6,918,407	3,703,230
Adriana Chiesa Enterprises	IT	5	1	6,591,839	73,160
Intramovies	IT	3	1	6,064,406	6,915
Peter Rommel	DE	1	1	5,795,696	975,607
Hanway Films	UK	3	3	5,745,313	2,902,166
Latido Films	ES	4	4	5,533,559	766,257
Nordisk Film Int. Sales	DK	4	2	4,477,556	2,890,024
Portman Film	UK	4	2	4,174,904	3,357,856
Beyond Films	UK	2	2	2,263,424	2,263,424
All other companies		60	49	32,330,112	9,805,468
Grand Total		283	253	1,658,829,527	892,953,503

95 sales companies were involved. 41 sales companies were responsible for 223 of the films (79% of the total so far released). These 223 films accounted for 98% of the US\$ 1.659 billion box office earned by the 283 films to March 2006. The same 41 sales agents were responsible for 204 (81%) of the 253 films released outside of their home territory. These 204 films accounted for 99% of the US\$893 million box office earned by the 253 films outside of their home territory.

53% of the 223 titles were handled by 12 sales agents based in France. These 118 titles accounted for 37.9% of the total box office earned by the 223 titles in the 14 territories and 38.8% of the box office outside of the titles' home territory. US-based sales agents accounted for 20% of the titles and 36.9% of the box office earned by the 223 titles outside of their home territory. The five Germany-based sales agents handled fewer titles than the nine UK-based sales agents but they accounted for a higher percentage of the box office earned by the 223 titles outside of their home territory. Denmark and Italy-based sales agents handle the same number of titles (12 each) but accounted for very different percentages of the box office earned by the 223 films outside of their home territory (2.1% versus 0.1%).

Sources:
Estimates based on AC Nielsen/EDI data for all countries except for Denmark (source: Danish Film Institute) and Italy (source: Osservatorio Italiano dell'Audiovisivo).

Country where sales agent is based	No. of sales agents based in the country	Total no. of titles handled	Total box office of titles handled (US\$ millions)	Box office of titles handled outside of home territory (US\$ millions)
France	12	118	616.2	342.5
Germany	5	23	208.8	94.6
Denmark	2	12	27.2	18.6
Spain	2	7	52.7	14.4
Italy	3	12	23.8	0.9
United Kingdom	9	34	126.8	86.1
USA	8	17	571.0	326.0
Total	41	223	1.626.5	883.1

Country where sales agent is based	% of sales agents based in the country	No. of titles handled as % of total	Total box office of titles handled (%)	Box office of titles handled outside of home territory (%)
France	29%	53%	37.9%	38.8%
Germany	12%	10%	12.8%	10.7%
Denmark	5%	5%	1.7%	2.1%
Spain	5%	3%	3.2%	1.6%
Italy	7%	5%	1.5%	0.1%
United Kingdom	22%	15%	7.8%	9.8%
USA	20%	8%	35.1%	36.9%
Grand Total	100%	100%	100%	100%

Data and analysis prepared for Copenhagen

344 FILM DATABASE: ANALYSIS OF FRENCH, GERMAN, ITALIAN, SPANISH AND UK RELEASES IN EACH OTHER'S COUNTRY

The following 20 tables describe how films travel between the five major European film markets: France, Germany, Italy, Spain and the UK.

Some of the perceptions that emerge from our sample of 344 films (the European films in official selection at the Berlin, Cannes and Venice film festivals, 2002 – 2005 plus the European films selected for Toronto in 2004 and 2005 – the same sample as used for the information notes) are obvious and unsurprising: the national market most receptive to films from other European countries is Italy; French films have much better access to other European markets than those from other countries (and, of course, there are more of them), and, in general, a non-national European film that is distributed in one territory outside of its home market is distributed in all major territories. Films tend to perform similarly in different territories: *The Pianist* was in one of the top three most successful French films in the four major European territories (excluding France). Michael Haneke's *Caché* was the seventh most successful French film in Germany, with €940,000 at the box office; the fifth most successful French film in Italy, with €1,290,000; the fifth most successful French film in Spain, with €630,000, and the third most successful French film in the UK, with €1,960,000.

Some films, though, fare very differently: *L'Équipier* was the sixth most successful French film in Germany but was unreleased in any of the

three major European territories. *Le grand voyage* nor *Yadon Ilaheyya* were released Germany, Spain and the UK but not in Italy, despite more French films being distributed in Italy than any of the other major European territories. *Flach Pyramide* sold six or seven titles to Italy, Spain and the UK but only three to Germany. Both the two Italian films distributed in Germany had been shown in Berlin, as had and four of the eight Spanish films distributed in Germany. But of the 20 French films distributed in Germany, only six had been shown in Berlin and only five of the 21 UK films distributed in Germany had been shown in Berlin. Perhaps the most surprising picture to emerge is that very few films non-national European films released are co-productions: 40 French films were released in Italy of which three were Franco-Italian co-productions (two Franco-Italian co-productions in the sample were not released in Italy). There were also 40 French films released in the UK, of which three were Franco-British co-productions (two Franco-British co-productions in the sample were not released in the UK). 34 French films were released in Spain of which three were Franco-Spanish co-productions, the only three Franco-Spanish co-productions in the sample. 20 French films were released in Germany of which three were Franco-German co-productions: four Franco-German co-productions in the sample were not released in Germany. Over the period, 2001 – 2005, there were in all 45 official Franco-German co-productions.

None of the 11 French films in the sample released in Germany were Franco-German co-productions.

French films released in Germany

Original title	Director	Festival	Franco-German Co-Pro?	Production Company	Year	prizes	Sales Agent International Distributor	Germany BO (€)
8 Femmes	François Ozon	B02		Fidélité	2002	2	Celluloid Dreams	8,280,584
Les choristes	Christophe Barratier	T04		Galatee Films	2004		Pathé Pictures Int'l.	5,910,731
The pianist	Roman Polanski	C02	yes	R.p Productions	2004		Studio Canal	4,983,502
Swimming pool	François Ozon	C03		Fidélité	2002	0	Celluloid Dreams	2,963,576
L'equipier	Philippe Lioret	T04		Nord-ouest	2004		Studio Canal	960,464
Caché	Michael Haneke	C05	yes	Les Films Du Losange	2005	2	Les Films Du Losange	939,104
5 X 2	François Ozon	V04/TO4		Oliver Delbosc, Fidélité	2004		Celluloid Dreams	911,501
Comme une image	Agnès Jaoui	C04		Les Films A4	2003	2	Studio Canal	797,145
La fleur du mal	Claude Chabrol	B03		Mk2 Sa	2002	0	Mk2	746,291
Confidences trop intimes	Patrice Leconte	B04		Les Film Alain Sarde	2004	0	Studio Canal	704,206
Amen	Costa Gavras	B02		Renn Productions	2002	0	Pathé Pictures Int'l.	562,811
Gabrielle	Patrice Chéreau	V05		Azor Films	2004		Studio Canal	200,023
De battre mon coeur s'est arrêté	Jacques Audiard	B05		Why Not Productions, Paris	2004	2	Celluloid Dreams	173,576
Darwin's nightmare	Hubert Sauper	T04		Mille Et Une Productions	2004		Celluloid Dreams	158,811
Le grand voyage	Ismael Ferroukhi	T04		Ognon Pictures	2004		Flach Pyramide International	141,239
Yadon ilaheyya	Elia Suleiman	C02	yes	Lichtblick	2002		Flach Pyramide International	124,857
Irreversible	Gaspar Noe	C02		120 Films	2002		Wild Bunch	109,194
L'homme du train	Patrice Leconte	V02		Cine B	2002		Pathé Pictures Int'l.	108,543
Son frère	Patrice Chéreau	B03		Azor Films	2002	2	Flach Pyramide International	37,935
Sud pralad	Apichatpong Weerasethakul	C04		Anna Sanders Films	2004	2	Celluloid Dreams	25,507

French films released in Italy

Original title	Director	Festival	Franco-Italian Co-Pro?	Production Company	Year	prizes	Sales Agent International Distributor	Italy BO (€)
The pianist	Roman Polanski	C02		R.p Productions	2004		Studio Canal	4,892,734
8 Femmes	François Ozon	B02		Fidélité	2002	2	Celluloid Dreams	2,196,270
Confidences trop intimes	Patrice Leconte	B04		Les Film Alain Sarde	2004	0	Studio Canal	1,870,910
L'homme du train	Patrice Leconte	V02		Cine B	2002		Pathé Pictures Int'l.	1,653,913
Caché	Michael Haneke	C05	yes	Les Films Du Losange	2005	2	Les Films Du Losange	1,291,073
Irreversible	Gaspar Noe	C02		120 Films			Wild Bunch	1,061,121
Comme une image	Agnès Jaoui	C04		Les Films A4	2003	2	Studio Canal	1,007,776
Les choristes	Christophe Barratier	T04		Galatee Films	2004		Pathé Pictures Int'l.	994,610
L'adversaire	Nicole Garcia	C02		Les Film Alain Sarde			Wild Bunch	687,085
Brodeuses	Eleonore Faucher	T04		Sombbrero Productions	2004		Flach Pyramide International	383,942
Les temps qui changent	André Téchiné	B05		Gemini Films	2004	0	Gemini Films	383,499
La fleur du mal	Claude Chabrol	B03		Mk2 Sa	2002	0	Mk2	380,366
Va, vis et deviens	Radu Mihaileanu	T05		Elzevir Films	2005		Films Distribution	306,916
De battre mon coeur s'est arrêté	Jacques Audiard	B05		Why Not Productions, Paris	2004	2	Celluloid Dreams	267,343
Les sentiments	Noémie Lvovsky	V03		Claude Berri, Hirsch Prod.	2003		Arp	258,495
Swimming pool	François Ozon	C03		Fidélité	2002	0	Celluloid Dreams	238,609
Gabrielle	Patrice Chéreau	V05	yes	Azor Films	2004		Studio Canal	228,583
Marie-jo et ses deux amours	Robert Guédiguian	C02		Agat Films & Cie			Films Distribution	216,179
5 X 2	François Ozon	V04/T04		Oliver Delbosc, Fidélité	2004		Celluloid Dreams	210,231
Lundi martin	Otar Iosseliani	B02	yes	Pierre Grise Productions	2001	2	Celluloid Dreams	184,859
Le promeneur du champ de mars	Robert Guédiguian	B05		Film Oblige, Paris	2004	0	Pathé Pictures Int'l.	114,024
Feux rouges	Cédric Kahn	B04		Aliceleo	2003	0	Celluloid Dreams	107,347
O principio da incerteza	Manoel De Oliveira	C02		Gemini Films			Gemini Films	98,775
Triple agent	Erik Rohmer	B04		Rezo Productions	2004	0	Wild Bunch	97,412
Batalla en el cielo	Carlos Reygadas	C 05		Societe Parisienne De Production	2004	0	The Coproduction Office	92,972
Laissez-passer	Bertrand Tavernier	B02		Les Film Alain Sarde	2001	2	Studio Canal	89,759
Peindre ou faire l'amour	Jean-marie Larrieu, Arnaud Larrieu	C05		Les Films Pelléas		0	Flach Pyramide International	83,884
Ma mere	Christophe Honoré	T04		Gemini Films	2004		Gemini Films	77,965
Les amants réguliers	Philippe Garrel	V05		Gilles Sandoz, Maia Films	2004		Films Distribution	71,659
Exils	Tony Gatlif	C04		Princes Films	2003	2	Flach Pyramide International	59,054
Clean	Olivier Assayas	C04/T04		Rectangle Productions	2003	2	The Works	50,494
Lemming	Dominik Moll	C05		Diaphana Films		0	Celluloid Dreams	35,216
Anatomie de l'enfer	Catherine Breillart	T04		Pyramide Int'l	2004		Flach Pyramide International	35,203
La petite lili	Claude Miller	C03		Les Films De La Boissiere	2003	0	Flach Pyramide International	35,003
Sud pralad	Apichatpong Weerasethakul	C04		Anna Sanders Films	2004	2	Celluloid Dreams	14,404
Twentynine palms	Bruno Dumont	V03		3 B Productions	2003		Flach Pyramide International	9,449
Darwin's nightmare	Hubert Sauper	T04		Mille Et Une Productions	2004		Celluloid Dreams	5,528
Petites coupures	Pascal Bonitzer	B03		Rezo Productions	2003	0	Flach Pyramide International	921
Innocence	Lucile Hadzihalilovic	T04		Ex Nihilo	2004		Wild Bunch	455
Amen	Costa Gavras	B02		Renn Productions	2002	0	Pathé Pictures Int'l.	204

French films released in Spain

Original title	Director	Festival	Franco-Spanish Co-Pro?	Production Company	Year	prizes	sales agent international distributor	Spanish BO (€)
The Pianist	Roman Polanski	C02		R,p Productions	2004		Studio Canal	7,633,883
Les choristes	Christophe Barratier	T04		Galatee Films	2004		Pathé Pictures Int'l.	7,172,647
8 femmes	François Ozon	B02		Fidélité	2002	2	Celluloid Dreams	1,317,951
Amen	Costa Gavras	B02		Renn Productions	2002	0	Pathé Pictures Int'l.	844,609
Caché	Michael Haneke	C05		Les Films Du Losange	2005	2	Les films du Losange	628,508
l'Homme du train	Patrice Leconte	V02		Cine B	2002		Pathé Pictures Int'l.	397,680
Arsene Lupin	Jean Paul Salome	T04	yes	Hugo Films	2004		TF1 International	394,222
La fleur du mal	Claude Chabrol	B03		Mk2 Sa	2002	0	MK2	379,827
Comme Une Image	Agnès Jaoui	C04		Les Films A4	2003	2	Studio Canal	338,728
Confidences trop intimes	Patrice Leconte	B04		Les Film Alain Sarde	2004	0	Studio Canal	293,758
Marie-jo et ses deux amours	Robert Guédiguian	C02		Agat Films & Cie	2002		Films Distribution	235,891
Lila dit ça	Ziad Doueiri	T04		Huit Et Demi Prod	2004		Flach Pyramide International	219,377
Swimming Pool	François Ozon	C03		Fidélité	2002	0	Celluloid Dreams	181,261
Va, vis et deviens	Radu Mihaileanu	T05		Elzevir Films	2005		Films Distribution	166,624
Darwin's nightmare	Hubert Sauper	T04		Mille Et Une Productions	2004		Celluloid Dreams	165,930
Les égarés	André Téchine	C03		Fit Production	2003	0	Wild Bunch	155,752
Irreversible	Gaspar Noe	C02		120 Films	2002		Wild Bunch	116,234
Lundi Martin	Otar Iosseliani	B02		Pierre Grise Productions	2001	2	Celluloid Dreams	97,047
5 x 2	François Ozon	V04/TO4		Oliver Delbosc, Fidélité	2004		Celluloid Dreams	71,538
Mon pere is an engineer	Robert Guédiguian	T04		Agat Films & Cie	2004		Mercure International	69,035
Le Temps qui reste	Francois Ozon	T05		Fidélité	2005		Celluloid Dreams	68,720
Laissez-Passer	Bertrand Tavernier	B02		Les Film Alain Sarde	2001	2	Studio Canal	50,652
Exils	Tony Gatlif	C04		Princes Films	2003	2	Flach Pyramide International	48,198
Triple Agent	Erik Rohmer	B04		Rezo Productions	2004	0	Wild Bunch	46,175
Le promeneur du Champ de Mars	Robert Guédiguian	B05		Film Oblige, Paris	2004	0	Pathé Pictures Int'l.	45,935
Yadon Ilaheyya	Elia Suleiman	C02		Lichtblick	2002		Flach Pyramide International	44,803
Au plus près du paradis	Tonie Marshall	V02	yes	Gilles Sandoz, Maia Films	2002		Flach Pyramide International	30,480
Le grand voyage	Ismael Ferroukhi	T04		Ognon Pictures	2004		Flach Pyramide International	28,108
Batalla en el cielo	Carlos Reygadas	C 05		Societe Parisienne De Production	2004	0	The Coproduction Office	27,398
L'Adversaire	Nicole Garcia	C02	yes	Les Film Alain Sarde	2002		Wild Bunch	24,172
O principio da incerteza	Manoel De Oliveira	C02		Gemini Films	2002		Gemini Films	15,947
Les côtelettes	Bertrand Blier	C03		Hachette Première Et Cie	2003	0	Europa Corp	11,901
Son frère	Patrice Chéreau	B03		Azor Films	2002	2	Flach Pyramide International	9,247
Demonlover	Olivier Assayas	C02		Forensic Films	2002		Wild Bunch	7,759

French films released in UK

Original title	Director	Festival	Franco-UK Co-Pro?	Production Company	Year	prizes	Sales Agent International Distributor	UK BO (€)
The pianist	Roman Polanski	C02	yes	R.p Productions	2004		Studio Canal	4,458,501
Revolver	Guy Ritchie	T05	yes	Europa Corp.	2005		Europa Corp	3,134,582
Caché	Michael Haneke	C05		Les Films Du Losange	2005	2	Les Films Du Losange	1,961,612
Les choristes	Christophe Barratier	T04		Galatee Films	2004		Pathé Pictures Int'l.	1,608,464
Swimming pool	François Ozon	C03		Fidélité	2002	0	Celluloid Dreams	1,112,951
8 Femmes	François Ozon	B02		Fidélité	2002	2	Celluloid Dreams	882,947
Comme une image	Agnès Jaoui	C04		Les Films A4	2003	2	Studio Canal	846,143
De battre mon coeur s'est arrêté	Jacques Audiard	B05		Why Not Productions, Paris	2004	2	Celluloid Dreams	836,765
L'homme du train	Patrice Leconte	V02		Cine B	2002		Pathé Pictures Int'l.	656,522
5 X 2	François Ozon	V04/T04		Oliver Delbosc, Fidélité	2004		Celluloid Dreams	573,149
Confidences trop intimes	Patrice Leconte	B04		Les Film Alain Sarde	2004	0	Studio Canal	285,900
Irreversible	Gaspar Noe	C02		120 Films			Wild Bunch	259,524
Feux rouges	Cédric Kahn	B04		Aliceleo	2003	0	Celluloid Dreams	235,284
Le promeneur du champ de mars	Robert Guédiguian	B05		Film Oblige, Paris	2004	0	Pathé Pictures Int'l.	200,649
Yadon ilaheyya	Elia Suleiman	C02		Lichtblick			Flach Pyramide International	160,053
Rois et reine	Arnaud Desplechin	V04/T04		Pascal Caucheteux, Why Not Prod.	2004		Wild Bunch	160,008
Laissez-passer	Bertrand Tavernier	B02		Les Film Alain Sarde	2001	2	Studio Canal	140,456
Batalla en el cielo	Carlos Reygadas	C 05		Societe Parisienne De Production	2004	0	The Coproduction Office	123,317
Amen	Costa Gavras	B02		Renn Productions	2002	0	Pathé Pictures Int'l.	109,044
Petites coupures	Pascal Bonitzer	B03		Rezo Productions	2003	0	Flach Pyramide International	106,978
Triple agent	Erik Rohmer	B04		Rezo Productions	2004	0	Wild Bunch	73,076
Lundi martin	Otar Iosseliani	B02		Pierre Grise Productions	2001	2	Celluloid Dreams	66,839
Va, vis et deviens	Radu Mihaileanu	T05		Elzevir Films	2005		Films Distribution	28,640
Arsene lupin	Jean Paul Salome	T04	yes	Hugo Films	2004		Tf1 International	28,230
Ma mere	Christophe Honore	T04		Gemini Films	2004		Gemini Films	27,695
Le grand voyage	Ismael Ferroukhi	T04		Ognon Pictures	2004		Flach Pyramide International	25,838
Clean	Olivier Assayas	C04/T04		Rectangle Productions	2003	2	The Works	23,528
Sud pralad	Apichatpong Weerasethakul	C04		Anna Sanders Films	2004	2	Celluloid Dreams	22,262
L'intrus	Claire Denis	V04/T04		Humbert Balsan, Ognon Pictures	2004		Flach Pyramide International	19,401
La nuit de la verite	Fanta Regina Nacro	T04		Acrobates Films	2004		Acrobates Films	18,057
Son frère	Patrice Chéreau	B03		Azor Films	2002	2	Flach Pyramide International	15,563
Brodeuses	Eleonore Faucher	T04		Sombrero Productions	2004		Flach Pyramide International	12,110
Anatomie de l'enfer	Catherine Breillart	T04		Pyramide Int'l	2004		Flach Pyramide International	12,086
Five	Abbas Kiarostami	T04		Mk2 Sa	2004		Mk2	10,479
Un monde presque paisible	Michel Deville	V02		Rosalinde Deville, Elefilm	2002		Films Distribution	10,320
La fleur du mal	Claude Chabrol	B03		Mk2 Sa	2002	0	Mk2	5,748
Demonlover	Olivier Assayas	C02		Forensic Films			Wild Bunch	2,966
Les égarés	André Téchine	C03		Fit Production	2003	0	Wild Bunch	2,811
Tiresia	Bertrand Bonello	C03		Haut Et Court	2002	0	Celluloid Dreams	344
Raja	Jacques Doillon	V03		Les Films Du Losange	2003		Les Films Du Losange	189

German films released in France

Original title	Director	Festival	Austria-German co-pro?	Production Company	Year	sales agent international distributor	France BO (€)
Goodbye Lenin	Wolfgang Becker	B03		X Film Creative Pool	2002	Bavaria Film International	7,785,380
Der Untergang	Oliver Hirschbiegel	T04		Constantin Film Prod.	2004	EOS Distribution	5,324,549
Don't Come Knockin'	Wim Wenders	C05		Reverse Angle Production Gmbh	2005	Hanway Films	856,727
Gegen die Wand	Fatih Akin	B04		Wueste Film	2003	Bavaria Film International	679,759
Die fetten Jahre sind vorbei	Hans Weingartner	C04		Y3 Film – Hans Weingartner – Filmproduktion	2004	Celluloid Dreams	393,933
Rosenstrasse	Margarethe Von Trotta	V03		Richard Schöps, Studio Hamburg	2003	Studio Canal	164,770
Heaven	Tom Tykwer	B02		X Film Creative Pool	2001	Miramax	105,568
Sommersturm	Marco Kreuzpaintner	T04		Claussen & Wobke Filmprod.	2004	Bavaria Film International	22,401
Halbe Treppe	Andreas Dreesen	B02		Peter Rommel Filmproduktion	2001	Bavaria Film International	18,464
Lichter	Hans-christian Schmid	B03		Claussen & Wobke Filmprod.	2002	Bavaria Film International	9,050
Führer EX	Winfried Bonenger	V02		Next Film	2002	Bavaria Film International	8,736

German films released in Italy

Original title	Director	Festival	Italy-German co-pro?	Production company	Year	sales agent international distributor	Italy BO (€)
Goodbye Lenin	Wolfgang Becker	B03		X Film Creative Pool	2002	Bavaria Film International	1,553,908
Der Untergang	Oliver Hirschbiegel	T04		Constantin Film Prod.	2004	EOS Distribution	1,517,911
Sophie Scholl	Marc Rothemund	B05		Neue Goldkind Filmprod	2004	Bavaria Film International	606,140
Rosenstrasse	Margarethe von Trotta	V03		Richard Schöps, Studio Hamburg	2003	Studio Canal	561,114
Die grosse Stille	Philip Groening	T05		Philip Groening Filmproduction	2005	Bavaria Film International	456,290
Don't come knocking	Wim Wenders	C05		Reverse Angle Production Gmbh	2005	Hanway Films	439,495
Heaven	Tom Tykwer	B02		X Film Creative Pool	2001	Miramax	41,137

German films released in Spain

Original title	Director	Festival	Spain-Germany co-pro?	Production company	Year	sales agent international distributor	Spain BO (€)
Der Untergang	Oliver Hirschbiegel	T04		Constantin Film Prod.	2004	EOS Distribution	3,552,235
Goodbye Lenin	Wolfgang Becker	B03		X Film Creative Pool	2002	Bavaria Film International	2,526,078
Gegen die Wand	Fatih Akin	B04		Wueste Film	2003	Bavaria Film International	495,388
Sophie Scholl	Marc Rothemund	B05		Neue Goldkind Filmprod	2004	Bavaria Film International	173,463
Nackt	Doris Dörrie	V02		Norbert Preuss, Fanes Film	2002	Cinepool	143,600
Die fetten Jahre sind vorbei	Hans Weingartner	C04		Y3 Film – Hans Weingartner – Filmproduktion	2004	Celluloid Dreams	135,897
Sommersturm	Marco Kreuzpaintner	T04		Claussen & Woebke Filmprod.	2004	Bavaria Film International	62,401
Der neunte Tag	Volker Schlöndorff	T04		Provobis Film GmbH	2004	Telepool	52,064

German films released in UK

Original title	Director	Festival	UK-Germany Co-pro?	Production Company	Year	sales agent international distributor	UK BO (€)
Der Untergang	Oliver Hirschbiegel	T04		Constantin Film Prod.	2004	EOS Distribution	2,855,111
Goodbye Lenin	Wolfgang Becker	B03		X Film Creative Pool	2002	Bavaria Film International	1,865,861
Die fetten Jahre sind vorbei	Hans Weingartner	C04		Y3 Film – Hans Weingartner – Filmproduktion	2004	Celluloid Dreams	431,850
Heaven	Tom Tykwer	B02		X Film Creative Pool	2001	Miramax	350,535
Gegen die Wand	Fatih Akin	B04		Wueste Film	2003	Bavaria Film International	140,249
Sophie Scholl	Marc Rothemund	B05		Neue Goldkind Filmprod	2004	Bavaria Film International	124,509
Sommersturm	Marco Kreuzpaintner	T04		Claussen & Woebke Filmprod.	2004	Bavaria Film International	31,815
Der Wald vor lauter Bäumen	Maren Ade	T04		Komplizen Film Gbr	2004	Komlizen Film GBR	1,940

Italian films released in France

Original title	Director	Festival	France-Italy co-pro?	Production Company	Year	prizes	sales agent international distributor	France BO (€)
Buongiorno, notte	Marco Bellocchio	V03		Filmalbatros Srl	2003		Celluloid Dreams	704,558
Kedma	Amos Gitai	C02	yes	Agav Hafakot	2002		Celluloid Dreams	533,889
Io non ho paura	Gabriele Salvatores	B03		Colorado Film	2002	0	Capitol Film	442,017
Mary	Abel Ferrara	V05	yes	De Nigris Productions	2005		Wild Bunch	386,297
Le chiavi della casa	Gianni Amelio	V04/T04		Pola Pandore Prod.	2004		Lakeshore International Ent. Group	204,515
L'ora di religione	Marco Bellocchio	C02		Filmalbatros Srl	2001	0	Rai Trade	197,532
Le conseguenze dell'amore	Paolo Sorrentino	C04		Fandango	2004	0	The Works	139,727
Il cuore altrove	Pupi Avati	C03		Duea Film	2002	0	Rai Trade	139,298
L'Amore ritrovato	Carlo Mazzacurati	T04	yes	Bianca Films	2004		Flach Pyramide International	98,073
Quando sei nato non puoi più nasconderti	Marco Tullio Giordana	C05	yes	Cattleya		0	TF1 International	59,009
Private	Saverio Costanzo	T04		Offside Srl	2004		Scalpel	54,260
Vento di terra	Vincenzo Marra	T04		R&c Produzioni	2004		Films Distribution	24,950
Lavorare con lentezza	Guido Chiesa	V04		Fandango	2004		The Works	15,935

Italian films released in Spain

Original title	Director	Festival	Spain-Italy co-pro?	Production Company	Year	prizes	sales agent international distributor	Spain BO (€)
Buongiorno, notte	Marco Bellocchio	V03		Filmalbatros Srl	2003		Celluloid Dreams	152,331
Le chiavi della casa	Gianni Amelio	V04/T04		Pola Pandore Prod.	2004		Lakeshore International Ent. Group	139,525
Il cuore altrove	Pupi Avati	C03		Duea Film	2002	0	Rai Trade	82,778
L'ora di religione	Marco Bellocchio	C02		Filmalbatros Srl	2001	0	Rai Trade	24,109
Vento di terra	Vincenzo Marra	T04		R&c Produzioni	2004		Films Distribution	15,989

Italian films released in Germany

Original title	Director	Festival	Germany-Italy co-pro?	Production company	Year	prizes	sales agent international distributor	Germany BO (€)
Io non ho paura	Gabriele Salvatores	B03		Colorado Film	2002	0	Capitol Film	122,793
Brucio nel vento	Silvio Soldini	B02		Albachiara Spa	2002	0	Adriana Chiesa Enterprises	47,022

Italian films released in the UK

Original title	Director	Festival	UK-Italy co-pro?	Production company	Year	prizes	sales agent international distributor	UK BO (€)
Le conseguenze dell'amore	Paolo Sorrentino	C04		Fandango	2004	0	The Works	675,872
Io non ho paura	Gabriele Salvatores	B03		Colorado Film	2002	0	Capitol Film	404,478
Le chiavi della casa	Gianni Amelio	V04/T04		Pola Pandore Prod.	2004		Lakeshore International Ent. Group	60,194
Tickets	Ermanno Olmi, A.Kiarostami, Ken Loach	B05	yes	Fandango	2004	0	The Works	59,441
Buongiorno, notte	Marco Bellocchio	V03		Filmalbatros Srl	2003		Celluloid Dreams	53,945
Private	Saverio Costanzo	T04		Offside SRL	2004		Scalpel	38,512

UK films released in France

Original title	Director	Festival	France-UK co-pro?	Production company	Year	prizes	sales agent international distributor	France BO (€)
Wallace & Gromit: the curse of the were-rabbit	Nick Park, Steve Box	T05		Dream Works Animation	2005		Dream Works	13,171,859
Tim Burton's Corpse Bride	Tim Burton, Mike Johnson	T05		Warner Bros.	2005		Warner Bros.	7,932,654
The Hours	Stephen Daldry	B03		Scott Rudin Prod	2002	2	Miramax	5,712,924
The Constant Gardener	Fernando Meirelles	V05		Simon Channing Williams	2004		Focus Features	3,545,445
The Magdalene Sisters	Peter Mullan	V02		Scozia	2002		Wild Bunch	3,252,732
Ae Fond Kiss	Ken Loach	B04		Sixteen Films	2003	0	The Works	2,393,399
Sweet Sixteen	Ken Loach	C02		Sixteen Films			The Works	1,883,925
Five children and It	John Stephenson	T04		Jim Henson Company	2004		Capitol Film	1,739,330
Dirty pretty things	Stephen Frears	V02		BBC Films	2002		Miramax	1,671,459
Mrs. Henderson presents	Stephen Frears	T05		Pathe Features Ltd	2005		Pathé Pictures Int'l.	1,343,023
Vera Drake	Mike Leigh	V04		Simon Channing Williams	2004		Studio Canal	1,167,009
Hotel Rwanda	Terry George	B05/T04		Lions Gate Entertainment	2005	0	Kigali Films London	992,170
My summer of love	Pawel Palikowski	T04		Apocalypso Pictures	2004		The Works	764,166
Bloody Sunday	Paul Greengrass	B02		Granada Film	2002	1	Portman Film	754,645
All Or Nothing	Mike Leigh	C02	yes	Les Film Alain Sarde			Studio Canal	503,283
Ladies in lavender	Charles Dance	T04		Scala Productions	2004		Lakeshore International Ent. Group	384,644
The libertine	Laurence Dunmore	T04		Mr. Mudd	2004		Odyssey Entertainment	291,437
Stage Beauty	Richard Eyre	T04		Tribeca Prod	2004		Icon Entertainment International	270,095
Modigliani	Mick Davis	T04	yes	Lucky 7 Productions	2004		Bauer Martinez Studios	254,724
9 Songs	Michael Winterbottom	T04		Revolution Films	2004		Wild Bunch	200,796
The heart is deceitful above all things	Asia Argento	T04		Above all things Inc	2004		Wild Bunch	133,068
Shooting Dogs	Michael Caton Jones	T05		Crossday Productions	2005		Crossday Productions	126,393
24 Hour Party People	Michael Winterbottom	C02		Revolution Films	2002	0	The Works	124,845
Sisters in law	Kim Longinotto, Florence Ayisi	T05		Vixen Films	2005		Women Make Movies	74,898
Millions	Danny Boyle	T04		Pathe Features Ltd	2004		Pathé Pictures Int'l.	56,448
Dear Frankie	Shona Auerbach	T04		Scorpio Films	2004		Pathé Pictures Int'l.	34,769
It's all gone Pete Tong	Michael Dowse	T04		Vertigo Prod.	2004		Hanway Films	15,673
Bear's kiss	Sergej Bodrov	V02		Pandora Film	2002		Fortissimo Film Sales	5,660

UK films released in Germany

Original title	Director	Festival	Germany-UK co-pro?	Production company	Year	prizes	sales agent international distributor	Germany BO (€)
Wallace & Gromit: the curse of the were-rabbit	Nick Park, Steve Box	T05		Dream Works Animation	2005		Dream Works	7,956,146
The hours	Stephen Daldry	B03		Scott Rudin Prod	2002	2	Miramax	4,605,530
The constant gardener	Fernando Meirelles	V05	Yes	Simon Channing Williams	2004		Focus Features	3,255,922
Ladies in lavender	Charles Dance	T04		Scala Productions	2004		Lakeshore International Ent Group	1,330,520
Hotel Rwanda	Terry George	B05/T04		Lions Gate Entertainment	2005	0	Kigali Films London	984,848
Iris	Richard Eyre	B02		Robert Fox Ltd	2002	2	Miramax	905,577
Tim Burton's Corpse Bride	Tim Burton, Mike Johnson	T05		Warner Bros.	2005		Warner Bros.	828,761
The Magdalene Sisters	Peter Mullan	V02		Frances Higgon, Scozia	2002		Wild Bunch	767,697
Ae Fond Kiss	Ken Loach	B04	Yes	Sixteen Films	2003	0	The Works	675,690
A good woman	Mike Barker	T04		Meltemi Entertainment	2004		Beyond Films	514,270
Dear Frankie	Shona Auerbach	T04		Scorpio Films	2004		Pathé Pictures Int'l.	352,738
My summer of love	Pawel Palikowski	T04		Apocalypso Pictures	2004		The Works	316,036
Stage Beauty	Richard Eyre	T04		Tribeca Prod	2004		Icon Entertainment International	281,291
Yes	Sally Potter	T04		Adventure Pictures	2004		GreeneStreet Films	123,200
9 Songs	Michael Winterbottom	T04		Revolution Films	2004		Wild Bunch	102,716
In this world	Michael Winterbottom	B03		Revolution Films	2002	1	First look media	96,013
Vera Drake	Mike Leigh	V04		Simon Channing Williams	2004		Studio Canal	94,618
All of Nothing	Mike Leigh	C02		Les Film Alain Sarde			Studio Canal	90,595
Sweet Sixteen	Ken Loach	C02	Yes	Sixteen Films			The Works	86,821
Beyond the sea	Kevin Spacey	T04	Yes	Archer Street, Studio 5	2004		Element X	68,328
Code 46	Michael Winterbottom	V03		Revolution Films	2003		The Works	43,908
Millions	Danny Boyle	T04		Pathe Features Ltd	2004		Pathé Pictures Int'l.	24,171
Bear's kiss	Sergej Bodrov	V02	Yes	Pandora Film	2002		Fortissimo Film Sales	2,251

UK films released in Italy

Original title	Director	Festival	Italy-UK co-pro?	Production company	Year	prizes	sales agent international distributor	Italy BO (€)
Tim Burton's Corpse Bride	Tim Burton, Mike Johnson	T05		Warner Bros.	2005		Warner Bros.	5,121,126
The hours	Stephen Daldry	B03		Scott Rudin Prod	2002	2	Miramax	5,002,574
Pride and Prejudice	Joe Wright	T05		Working title films	2005		Focus Features	4,113,268
The Magdalene Sisters	Peter Mullan	V02		Scozia	2002		Wild Bunch	3,285,030
Wallace & Gromit: the curse of the were-rabbit	Nick Park, Steve Box	T05		Dream Works Animation	2005		Dream Works	2,946,797
The libertine	Laurence Dunmore	T04		Mr. Mudd	2004		Odyssey Entertainment	1,766,087
Ae Fond Kiss	Ken Loach	B04	yes	Sixteen Films	2003	0	The Works	1,577,833
Vera Drake	Mike Leigh	V04		Simon Channing Williams	2004		Studio Canal	1,233,265
Bloody Sunday	Paul Greengrass	B02		Granada Film	2002	1	Portman Film	975,775
Mrs. Henderson presents	Stephen Frears	T05		Pathe Features Ltd	2005		Pathé Pictures Int'l.	951,289
The constant gardener	Fernando Meirelles	V05		Simon Channing Williams	2004		Focus Features	918,402
Modigliani	Mick Davis	T04	yes	Lucky 7 Productions	2004		Bauer Martinez Studios	912,692
Country of my skull	John Boorman	B04		The Works	2003	0	The Works	887,672
Hotel Rwanda	Terry George	B05/T04	yes	Lions Gate Entertainment	2005	0	Kigali Films London	558,152
Sweet Sixteen	Ken Loach	C02		Sixteen Films			The Works	511,560
Dirty pretty things	Stephen Frears	V02		BBC Films	2002		Miramax	393,790
Code 46	Michael Winterbottom	V03		Revolution Films	2003		The Works	264,876
Enduring Love	Roger Mitchell	T04		Free Range Films	2004		Pathé Pictures Int'l.	260,053
Stage Beauty	Richard Eyre	T04		Tribeca Prod	2004		Icon Entertainment International	234,396
In this world	Michael Winterbottom	B03		Revolution Films	2002	1	First look media	223,376
All or Nothing	Mike Leigh	C02		Les Film Alain Sarde			Studio Canal	192,421
Iris	Richard Eyre	B02		Robert Fox Ltd	2002	2	Miramax	182,220
Millions	Danny Boyle	T04		Pathe Features Ltd	2004		Pathé Pictures Int'l.	166,132
The heart is deceitful above all things	Asia Argento	T04		Above all things Inc	2004		Wild Bunch	159,454
Tsotsi	Gavin Hood	T05		The UK Film & TV Prod. Co. Pic	2005		the little film company	148,966
My summer of love	Pawel Palikowski	T04		Apocalypso Pictures	2004		The Works	127,222
Dear Frankie	Shona Auerbach	T04		Scorpio Films	2004		Pathé Pictures Int'l.	11,814
Bear's kiss	Sergej Bodrov	V02	yes	Pandora Film	2002		Fortissimo Film Sales	9,443

UK films released in Spain

Original Title	Director	Festival	Spain-UK co-pro?	Production company	Year	prizes	sales agent international distributor	Spain BO (€)
The Hours	Stephen Daldry	B03		Scott Rudin Prod	2002	2	Miramax	6,631,717
The Constant Gardener	Fernando Meirelles	V05		Simon Channing Williams	2004		Focus Features	6,152,760
Tim Burton's Corpse Bride	Tim Burton, Mike Johnson	T05		Warner Bros.	2005		Warner Bros.	4,353,663
Wallace & Gromit: The Curse Of The Were-rabbit	Nick Park, Steve Box	T05		Dream Works Animation	2005		Dream Works	3,891,856
Hotel Rwanda	Terry George	B05/T04		Lions Gate Entertainment	2005	0	Kigali Films London	1,088,226
Ae Fond Kiss	Ken Loach	B04	yes	Sixteen Films	2003	0	The Works	1,021,859
A Good Woman	Mike Barker	T04		Meltemi Entertainment	2004		Beyond Films	998,579
Iris	Richard Eyre	B02		Robert Fox Ltd	2002	2	Miramax	823,273
Ladies In Lavender	Charles Dance	T04		Scala Productions	2004		Lakeshore International Ent. Group	756,489
Sweet Sixteen	Ken LOACH	C02	yes	Sixteen Films			The Works	641,145
The Magdalene Sisters	Peter Mullan	V02		Frances Higgon, Scozia	2002		Wild Bunch	514,655
All Or Nothing	Mike LEIGH	C02		Les Film Alain Sarde			Studio Canal	391,545
Mrs. Henderson Presents	Stephen Frears	T05		Pathe Features Ltd	2005		Pathé Pictures Int'l.	390,517
Millions	Danny Boyle	T04		Pathe Features Ltd	2004		Pathé Pictures Int'l.	297,352
Code 46	Michael Winterbottom	V03		Revolution Films	2003		The Works	292,680
Dear Frankie	Shona Auerbach	T04		Scorpio Films	2004		Pathé Pictures Int'l.	217,497
Bear's Kiss	Sergej Bodrov	V02	yes	Karl Baumgartner. Pandora Film	2002		Fortissimo Film Sales	210,448
Five Children And It	John Stephenson	T04		Jim Henson Company	2004		Capitol Film	199,682
24 Hour Party People	Michael WINTERBOTTOM	C02		Revolution Films	2002	0	The Works	194,616
Bloody Sunday	Paul Greengrass	B02		Granada Film	2002	1	Portman Film	171,926
9 Songs	Michael Winterbottom	T04		Revolution Films	2004		Wild Bunch	138,655
Stage Beauty	Richard Eyre	T04		Tribeca Prod	2004		Icon Entertainment International	128,277
In This World	Michael Winterbottom	B03		Revolution Films	2002	1	First look media	112,857
Tsotsi	Gavin Hood	T05		The UK Film & TV Prod. Co. Pic	2005		the little film company	63,647
Trauma	Marc Evans	T04		Little Bird	2004		Myrad pictures	34,043

Spanish films released in France

Original title	Director	Festival	France-Spain co-pro?	Production company	Year	prizes	sales agent international distributor	France BO (€)
La mala educacion	Pedro Almodovar	T04		El Deseo	2004		Focus Features	6,327,044
Mar adentro	Alejandro Amenábar	V04/T04		Sogicine	2004		Sogepaq	1,404,645
Crimen ferpecto	Alex de la Iglesia	T04		Panico Films	2004		Sogepaq	827,552
El abrazo partido	Daniel Burmann	B04		BD Cine SRL	2004	2	Bavaria Film International	587,104
Familia Rodante	Pabli Trapero	T04		Matanza Cine	2004		Buena Onda Films	207,861
La nina santa	Lucrecia Martel	T04		El Deseo	2004		HBO Films London	206,604
Imagining Argentina	Christopher Hampton	V03		Myriad			Myriad Pictures	85,036

Spanish films released in Germany

Original title	Director	Festival	Germany-Spain co-pro?	Production company	Year	prizes	sales agent international distributor	Germany BO (€)
Mar adentro	Alejandro Amenábar	V04/T04		Sogicine	2004		Sogepaq	1,599,377
La mala educacion	Pedro Almodovar	T04		El Deseo	2004		Focus Features	1,180,006
My Life Without Me	Isabel Coixet	B03		El Deseo	2002	0	Focus Features	795,914
Crimen ferpecto	Alex de la Iglesia	T04		Panico Films	2004		Sogepaq	53,350
El abrazo partido	Daniel Burmann	B04		BD Cine SRL	2004	2	Bavaria Film International	35,703

Note:

One Germany-Spain-Italy co-production (Inconscientes – Joaquin Oristrell – 2004) was not released in Germany in the period to 31 March 2006

Spanish films released in Italy

Original title	Director	Festival	Italy-Spain co-pro?	Production company	Year	prizes	sales agent international distributor	Italy BO (€)
La mala educacion	Pedro Almodovar	T04		El Deseo	2004		Focus Features	4,307,150
Crimen ferpecto	Alex de la Iglesia	T04		Panico Films	2004		Sogepaq	1,248,376
Mar adentro	Alejandro Amenábar	V04/T04		Sogicine	2004		Sogepaq	737,132
El abrazo partido	Daniel Burmann	B04		BD Cine SRL	2004	2	Bavaria Film International	353,736
Imagining Argentina	Christopher Hampton	V03		Myriad			Myriad Pictures	259,218
La nina santa	Lucrecia Martel	T04		El Deseo	2004		HBO Films London	229,519
My Life Without Me	Isabel Coixet	B03		El Deseo	2002	0	Focus Features	117,977
La vida que te espera	Manuel Gutiérrez Aragón	B04		Tomasol Films	2003	0	Latido Films	352

Note:

Two Spain-Italy co-productions (El Metodo – Marcelo Pineyro – 2005 and Inconscientes – Joaquin Oristrell – 2004) were not released in Italy in the period to 31 March 2006

Spanish films released in the UK

Original title	Director	Festival	UK-Spain co-pro?	Production company	Year	prizes	sales agent international distributor	UK BO (€)
La mala educacion	Pedro Almodovar	T04		El Deseo	2004		Focus Features	2,073,387
Mar adentro	Alejandro Amenábar	V04/T04		Sogicine	2004		Sogepaq	497,306
My Life Without Me	Isabel Coixet	B03		El Deseo	2002	0	Focus Features	224,123
La nina santa	Lucrecia Martel	T04		El Deseo	2004		HBO Films London	176,225
Familia Rodante	Pabli Trapero	T04		Matanza Cine	2004		Buena Onda Films	44,042
Imagining Argentina	Christopher Hampton	V03	Yes	Myriad			Myriad Pictures	40,620

Survey of 29 National Funds in Europe

OVERVIEW

The questionnaire prepared for the Copenhagen ThinkTank was sent to 29 national funds: the 26 funds in the EU countries, plus Iceland, Norway and Switzerland. All 29 were completed and returned. This in itself is a significant result. One of the main purposes of the ThinkTank is to consider what insights can be drawn from the comparison of the way national funds operate across Europe. Presented here is a first pass at the analysis.

1. Strong agreement about three of the five main objectives (Q.1)

93% of respondents gave as their main objectives to secure a national film production and to secure production of quality films. 78% cited the objective to support the building of a sustainable film industry. 52% cited adding value to projects throughout the evaluation and production process, and stimulating employment and commercial activity. This last objective was shared by the four of the five “Big” countries (France, Germany, Italy, Spain and the UK), and by eight of the nine “Super Small” countries (Cyprus, Estonia, Iceland, Ireland, Latvia, Lithuania, Luxembourg, Malta and Slovenia).

2. ... but not about cultural versus commercial criteria (Q.5)

Overall, respondents give more weight to cultural criteria (the average is 3.4 out of 6) but there is a clear divide between the “Big” countries and the rest: the average for the “Big Countries is 1.6 out of six in favour of culture whereas for five the Nordic countries (Denmark, Finland, Iceland, Norway and Sweden) and the eight Central and Eastern European countries (Czech Republic, Estonia, Hungary,

Latvia, Lithuania, Poland, Slovakia and Slovenia) the average is 5.0 in favour of culture.

3. Half the countries operate automatic schemes (Q.4 and Q. 14)

All but two countries operate selective public support schemes; thirteen countries operate tax-based schemes: four based on tax credits for production expenditure, two based on tax incentives for investors, and seven on both.

4. In selecting projects, script and cultural importance matter most (Q.6)

Respondents put most weight on the distinctive quality of the script (5.2 out of 6.0) and cultural importance (4.7), although Nordic countries attach comparatively less significance to cultural importance (3.8). “Big” countries put greater emphasis on entertainment qualities (4.2) than the average (2.8).

5. Administrative staff talk to producers (Q.7 to Q.11)

Whether for development, production or distribution, it tends to be producers who submit projects for funding. In only a minority of the “Super Small” countries are writers and directors able to submit

projects even for development. Projects tend to be assessed by administrative staff that then tends to refer to the agency’s governing body for a decision. In two-thirds of countries, staff and/or decision makers meet with the people doing the project (producer, director and – usually – the writer).

6. Public support is a powerful determinant ... in general (Q.18)

Overall, respondents put a weight of 3.1 (out of 6) on the extent to which public money determined whether a project was made. Nordic countries put the weight at 4.8; all “Small” and “Super Small” countries (including CEE countries) put on a weight of 3.6 – 3.8. But “Big” countries considered that the effect was only marginal (0.0).

7. Films schools are important for directors and cinematographers (Q.24)

Two-thirds of countries have a national film school; most training takes place in universities. Most directors (2.5 out of 3) and cinematographers (2.3) are graduates of film schools but screenwriters and producers tend to have been trained on the job (1.6).

8. Fewer than half the countries operate a “first film” scheme (Q.25)

First film schemes exist in 45% of countries – more in “Big” Countries (three out of five) and significantly less in “Super Small” and Nordic countries (only in two and one, respectively). In nearly all cases where such schemes operate, the films are intended for theatrical release (92%) but less often for showing on television (54%).

9. In evaluating the effect of support schemes, festival prizes matter most (Q.30)

Respondents put the most weight (4.7 out of 6) on festival awards and prizes as the basis for evaluating the effect of their support schemes; the weight given by “Big” countries was higher (5.2). Next important was the national audience at the cinema (4.3). “Big” countries put more weight on return of public support (3.6) than they did on Critical acclaim (1.5). For them, like for “Super Small” and CEE countries what mattered more was employment in the production sector (3.8, 4.8 and 4.5, respectively). Nordic countries considered employment much less important (1.0).

10. The government is the final arbiter (Q.31)

83% of respondents said that responsibility for evaluating success lay with the government – or the public funder itself. In “Super Small”, CEE and Nordic countries the

figure was 100%. In “Big” countries, responsibility was split between government and industry bodies (60% each). In only one of the “Big” countries did the press contribute to the evaluation.

Note on the definition of countries

For the analysis, we have distinguished between “Big”, “Small” and “Super Small” countries. “Big” corresponds to the European Union term of “countries with large audiovisual capacity.” “Small” (as in the EU sense) applies to all other European countries. We have also used “Super Small”: this is applied to countries with populations below 5 million.

Survey of 29 National Funds in Europe

QUESTIONNAIRE**1. Main objectives of your national funding body**

Yes No (tick whichever applies)

 Secure a national film production Support the building of a sustainable film industry Secure production of quality films Add value to projects throughout the evaluation and production process Stimulate employment and commercial activity

Other, pls. describe:

2. Public support schemes in your country

Yes No

 Automatic distribution based on a set of objective criteria Selective distribution based on individual assessment of projects

Other:

If both automatic and selective support schemes are available, what proportions of available funds are distributed by:

% Automatic Schemes (including tax incentives)

% Selective Schemes

3. Support schemes are provided for

Yes No

Value in Euros

 Script development Project development Production support Distribution support Promotion support

4. Support schemes for various categories of films

Yes No Value in euros

"First Film" support scheme (further questions below)

Support scheme for artistic films

Support scheme for children and youth films

Support scheme for commercial films

One general support scheme for all types of films

Co-production scheme (further questions below)

Other:

5. Objectives for public film funding

Basic criteria

Is public support for film in general based on cultural or commercial/employment policy?

Cultural		Equal balance	Commercial
6 [] 5 [] 4 [] 3 [] 2 [] 1 []	0 []	1 [] 2 [] 3 [] 4 [] 5 [] 6 []	
Most	Least	Least	Most

6. Qualifying criteria for granting of public support

How is the importance of the various criteria rated on a 1 to 6 scale?

Yes	No	Tick applicable boxes	
		Subjective criteria	1 – Unimportant / 6 – Very important
<input type="checkbox"/>	<input type="checkbox"/>	Distinctive artistic quality of the script	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Entertainment qualities	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Innovative qualities “breaking new ground”	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Audience potential based on script	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Cultural importance	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	“National” characteristics	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>

Yes	No	Objective criteria	1 – Unimportant / 6 – Very important
<input type="checkbox"/>	<input type="checkbox"/>	Language	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Film for children and young people	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Women	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Minorities	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Merits of director (previous credits and awards)	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Merits of producer (prev. credits and awards)	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Merits of screenwriter (prev. credits and awards)	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Merits of the core team (prev. credits and awards)	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Acknowledged actors (prev. credits and awards)	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Previous support granted	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Distribution guarantee/ M.G.	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>

Other, pls. specify:

7. Application and types of grants offered

Who can apply for

	Script development support	Project development/ Pre-production	Production support
Director	[]	[]	[]
Screenwriter	[]	[]	[]
Director + Writer	[]	[]	[]
Producer	[]	[]	[]
Producer + Director/ Writer	[]	[]	[]
Producer + Writer	[]	[]	[]

Others:

	Domestic distribution/pro- motion support	Foreign markets Distribution/promotion support	Print support
Producer	[]	[]	[]
Distributor or Sales Agent	[]	[]	[]
Producer + Distributor or Sales Agent	[]	[]	[]

Other support schemes for development, production, distribution and promotion,
pls. specify:

8. Evaluation and decision process

Who is involved in evaluating applications and how are decisions to make an award taken?
(Tick whichever applies)

- Internal readers make a written analysis of the project/script
- External readers make a written analysis of the project/script
- Administrative staff assess project, budget, finance etc.
- Professional staff assess project, budget, finance etc.
- Recommendations for support are made by individuals
- Recommendations for support are taken by a team or group
- Evaluation and decisions are taken by a board of film professionals
- Decisions are taken by an individual
- Decisions are taken by the institute's or foundation's management team
- Decisions are taken by the institutes or foundation's governing body

Others:

9. Procedure

Yes No

- All communication is in writing
- Meetings are held with the applicants

10. Applicants participating in meetings

Yes No

Producer

Director

Writer

Distributor

Other participants:

11. Who will they meet?

Yes No

Professional staff (readers, producers, marketing/ distribution people)

Administrative staff

Decision makers

Others, pls. specify:

12. Level of production support

On what basis is the amount of support established? Tick whichever applies

A fixed percentage of the total budget

Individual percentage

A maximum percentage

A fixed amount regardless of budget

An individual amount

A maximum grant level

Proportional to the producer's investment

Other, pls. explain:

13. Types of grants offered for production

Yes No

- A repayable loan
- A "soft" loan, repayable after the private investment has been recovered
- A grant, not repayable
- A grant dependent on the commercial success of the film, paid upon cinema admissions
- A grant dependent on previous performance ("reference system" support)

Other, pls. describe:

14. Tax incentives

Yes No

- Tax subsidy programmes
- Production-related tax discount
- Discounts on production related expenditure

Other:

- Tax shelter programmes
- Investor tax deduction (e.g. sale-and-lease back)
- Tax deduction related to future income

Other:

15. What is the purpose of tax incentives?

Yes No

To attract private funding for domestic production

To attract foreign production to your country

To bolster employment in the audiovisual sector

To attract risk capital

Other, pls. specify:

16. Intensity of public (national or regional) support and value of tax incentives

% Average support as a percentage of budget (all sources combined)

% Average support as a percentage of budget of direct funding

% Average value of tax incentives as a percentage of budget

17. Compulsory television funding

Yes No

Does compulsory funding of feature film production exist in your country?

Television must buy screening rights

Television must invest in feature film production

Television may invest in feature film production

% Average value of television involvement in percentage of budget

18. Overall impact of public funding

To what extent does public support from your funding body determine whether a project is being made?

Entirely		50/50		Marginally
6 [] 5 [] 4 [] 3 [] 2 [] 1 []		0 []		1 [] 2 [] 3 [] 4 [] 5 [] 6 []

19. Co-production

Provided you engage in co-productions, pls. continue

Yes No

- Do you need a co-production treaty to engage in co-productions?
- Is the European Co-production Convention sufficient?
- Is funding for co-productions dependent on spend in your country?
- Is funding dependent on participation of national artists, technicians, facilities etc.?
- Is funding dependent on theatrical or television distribution in your country?
- Do you engage in co-finance on a mutual exchange basis?

If yes to the last question, are there any other strings attached to funding agreements?
 State which:

20. Who can apply for funding?

Yes No

A domestic co-producer

A foreign co-producer

21. Limits for funding

Yes No

Do limitations on funding intensity apply?

If yes, please answer the following questions:

A percentage of the spend in own country %

Maximum funding percentage of full budget %

Maximum percentage of domestic co-producers share of budget %

A maximum amount in euros

Other, pls. explain:

Structural cohesion

Training of new professionals / success in the industry

22. Specialised full-time degree programmes or equivalent

Yes No

National film school

University department

Regional school

Private film school

23. Vocational training programmes

Yes No

Organised by industry

Organised by film schools

Public adult training organisation

24. New blood – background – tick the statements that you find most appropriate

New successful creative people are graduates of film schools:

Directors Most
 Some
 Few

Screenwriters Most
 Some
 Few

Producers Most
 Some
 Few

Cinematographers Most
 Some
 Few

Sound designers Most
 Some
 Few

Film editors Most
 Some
 Few

Animation directors Most
 Some
 Few

New successful creative people have been trained on the job or have another background

Directors Most
 Some
 Few

Screenwriters Most
 Some
 Few

Producers Most
 Some
 Few

Cinematographers Most
 Some
 Few

Sound designers Most
 Some
 Few

Film editors Most
 Some
 Few

Animation directors Most
 Some
 Few

25. First feature film support programme

Programme exists Not applicable (Please go to question 3[])

26. Who can apply?

Yes No

 Director

 Screenwriter

 Director + Writer

 Producer

 Producer + Director/Writer

27. What types of films can benefit from funding?

Yes No

 Short fiction

 Feature length fiction

 Second feature film

 Documentaries

 Other, pls. explain:

28. Level of funding

Yes No

A fixed amount regardless of budget

A percentage of the budget

Full funding with a maximum amount

29. Exposure of films produced with support from the programme

Yes No

Theatrical release

Television transmission

Other:

30. Evaluation of the effect of your support schemes

Evaluation of success

Tick applicable boxes and rate importance

		IMPORTANCE						
Yes	No	Least				Most		
<input type="checkbox"/>	<input type="checkbox"/>	Critical acclaim	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Festival selections and awards	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Audience response – theatrical release	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Audience response – television release	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	The film's profitability	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Return of public support	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Employment in the production sector	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Distribution to other countries/territories	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>

Other, pls. specify:

31. Who evaluates success?

Yes No

Government / public funder

Industry bodies

The press

Others:

32. Does evaluation of success affect:

Yes No

Future entitlement to funding for individual producers

Future entitlement to funding for individual directors

Future entitlement to funding for individual companies

Future levels of Government support

Filled in by:

Name

Organisation

Address

Email

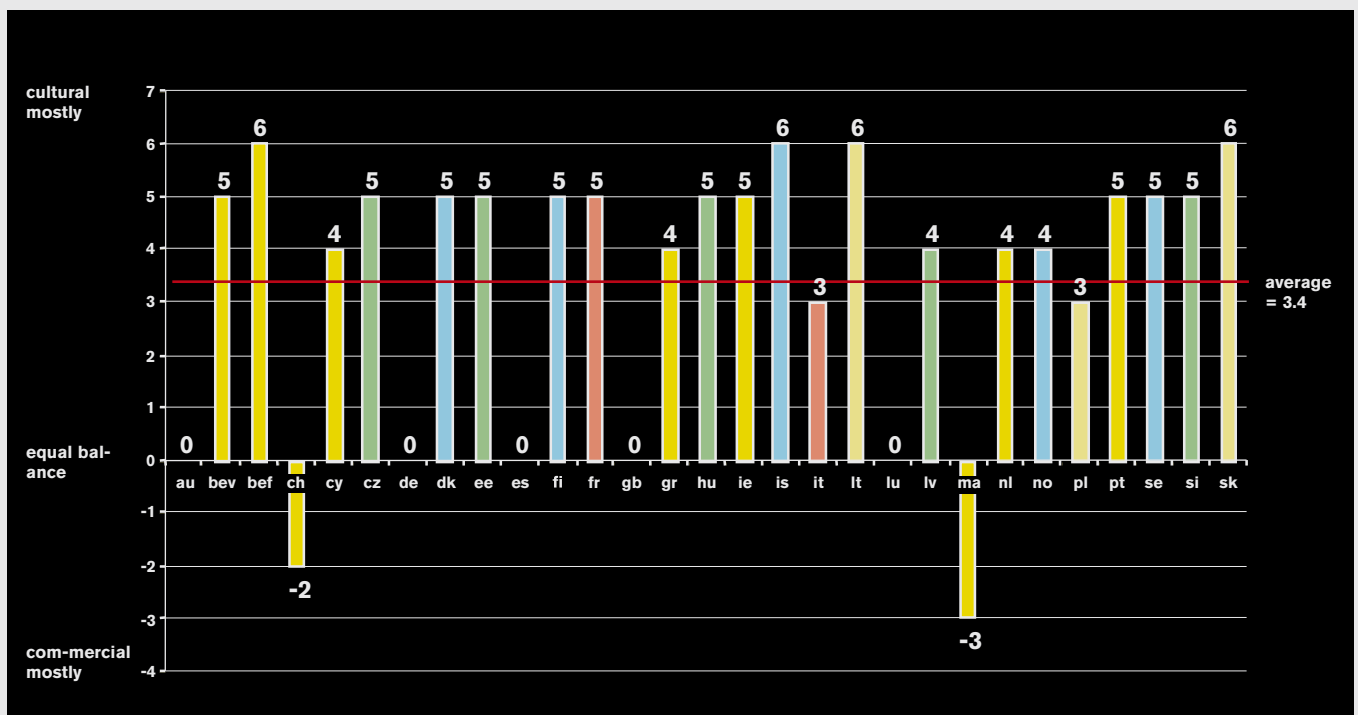
Phone

Survey of 29 National Funds in Europe

ANALYSIS

Question 5:

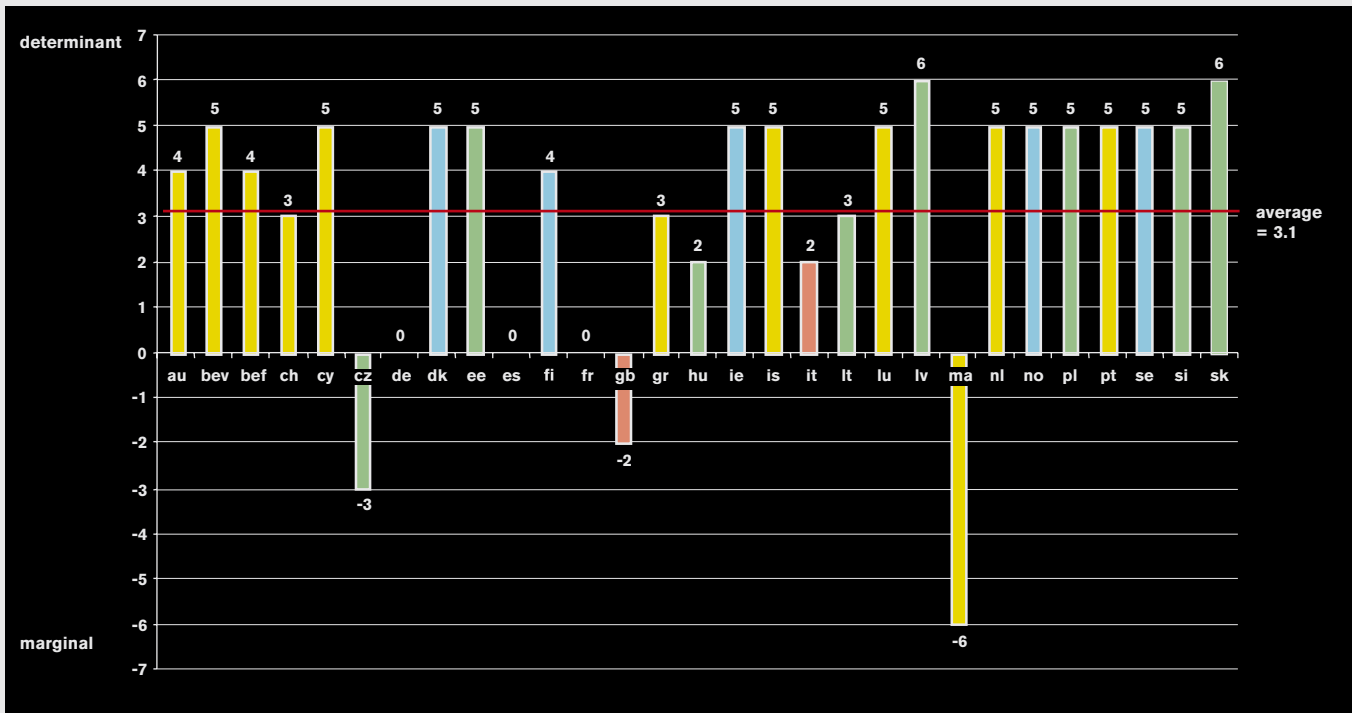
Is public support for film in general based on cultural or commercial/employment policy?



On average, national funds put the emphasis of their public support on cultural objectives, but there is no pattern to distinguish small and large countries, Central and Eastern European countries and Nordic countries tend to put the emphasis most strongly on cultural objectives.

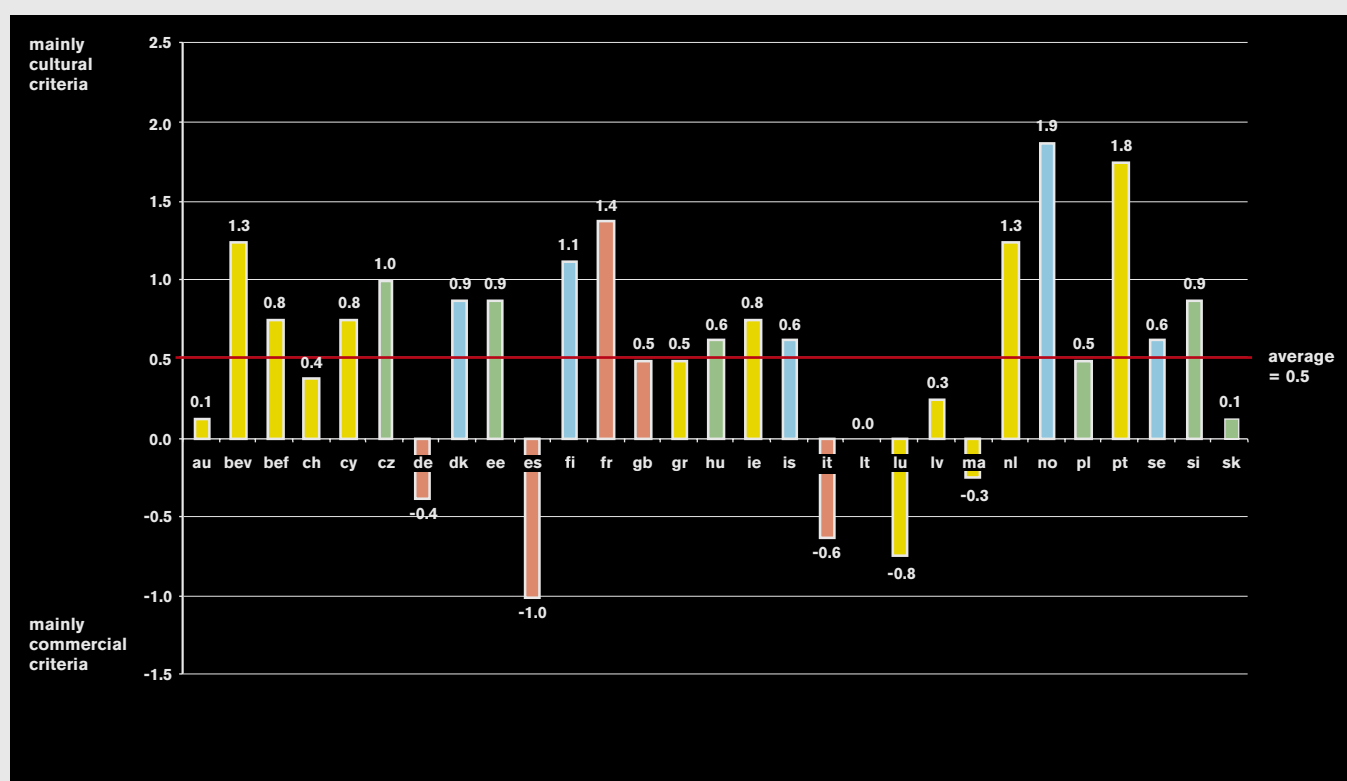
Question 18:

To what extent does public support from your funding body determine whether a project is being made?



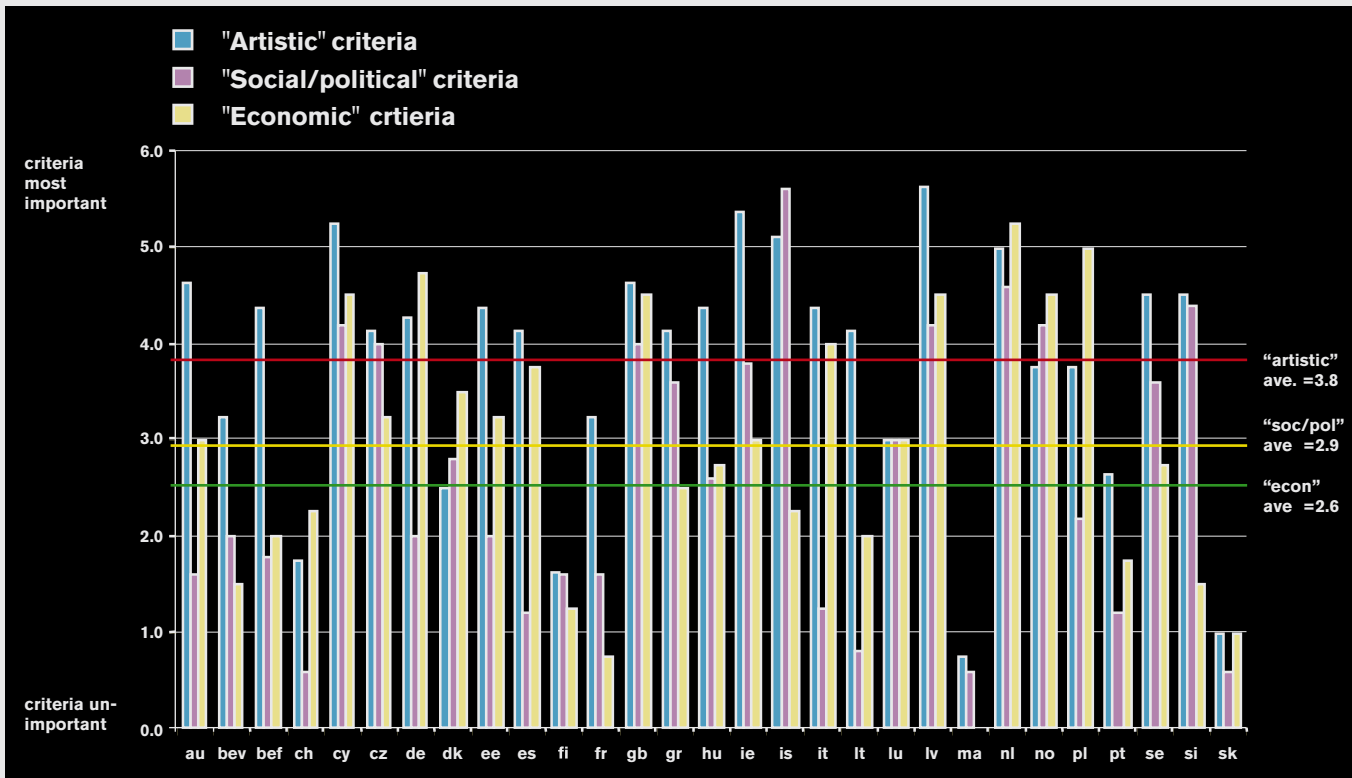
Overall, respondents put a weight of 3.1 (out of 6) on the extent to which public money determined whether a project was made. Nordic countries put the weight at 4.8; all “Small” and “Super Small” countries (including CEE countries) put on a weight of 3.6 – 3.8. For “Big” countries considered that the effect is only marginal (0.0), although this result arises because Italy (+2) and the United Kingdom (-2) cancel each other out.

Question 30:
Evaluation of success



The eight options given in Question 30 for how a fund evaluates success can be divided between more “cultural” criteria (critical acclaim, festival awards – i.e. peer recognition, audience appreciation) and more “commercial” criteria (profitability, employment creation, export success). By giving the four “commercial” criteria a negative value and aggregating the values for each of the eight criteria, we obtain a unique value. We see then that three Big countries – Germany, Italy and Spain – tend clearly towards looking for “commercial” success (as does Luxembourg). The countries putting most weight on “cultural” success criteria are Flemish Belgium, France, Netherlands, Norway and Portugal. This chart, when compared with the chart for Question 5, suggests five strongly consistent responses (Flemish Belgium, France, Malta, Portugal and the United Kingdom) and several interesting apparent inconsistencies.

Question 6:
Qualifying criteria for granting of public support



The options in Question 6 have been grouped into three sets: "Artistic" (Distinctive artistic quality of the script, Innovative qualities, Cultural importance, Merits of director, producer, screenwriter and of core team (previous credits and awards), Acknowledged actors); "Socio/Political" ("National" characteristics, Language, Film for children and young people, Women, Minorities) and "Economic" (Entertainment qualities, Audience potential based on script, Previous support granted, Distribution guarantee/ M.G). With the exception of Iceland and Norway, "artistic" criteria have more weight than "socio/political" criteria; "Economic" criteria are the most important in Germany, the Netherlands, Poland and Switzerland.

Country	Automatic Schemes unweighted	Selective Schemes unweighted	Tax incentives unweighted (1 = yes)	Decisions taken by an individual – unweighted	Decisions taken by committee – unweighted	Automatic Schemes Euros	Selective Schemes Euros	Tax incentives weighted	Decisions taken by an individual – weighted	Decisions taken by committee – weighted
au	0.20	0.80			1	3,678,000	14,712,000	-	-	0.031
bef	0.10	0.90	1		1	878,514	7,906,624	0.015	-	0.015
bev	0.00	1.00	1		1	-	9,750,000	0.016	-	0.016
ch	0.90	0.10			1	1,300,000	11,700,000		-	0.022
cy	0.00	1.00			1	-	342,540	-	-	0.001
cz	0.00	1.00			1	-	1,914,894	-	-	0.003
de	0.31	0.69			1	9,861,410	21,949,590	-	-	0.053
dk	0.00	1.00			1	-	24,600,000	-	-	0.041
ee	0.00	1.00			1	-	3,598,370	-	-	0.006
es	0.75	0.25	1		1	41,475,000	13,825,000	0.092	-	0.092
fi	0.00	1.00		1		-	10,557,750	-	0.018	-
fr	0.65	0.35	1		1	65,780,000	35,420,000	0.168	-	0.168
gb	0.00	1.00	1	1		-	80,307,142	0.133	0.133	-
gr	0.00	1.00			1	-	6,081,566	-	-	0.010
hu	0.29	0.71	1		1	4,485,140	10,980,860	0.026	-	0.026
ie	0.40	0.60	1		1	3,200,000	4,800,000	0.013	-	0.013
is	0.15	0.85	1		1	600,000	3,400,000	0.007	-	0.007
it	0.00	1.00		1		-	90,000,000	-	0.149	-
lt	0.25	0.75		1		272,754	818,261	-	0.002	-
lu	0.72	0.28	1		1	8,892,000	3,458,000	0.020	-	0.020
lv	0.15	0.85			1	327,000	1,853,000	-	-	0.004
ma	1.00	0.00	1		1	-	-	-	-	-
nl	0.05	0.95	1		1	920,000	17,480,000	0.031	-	0.031
no	0.30	0.70	1	1		7,024,500	16,390,500	0.039	0.039	-
pl	0.00	1.00	1		1	-	15,842,000	0.026	-	0.026
pt	0.00	1.00			1	-	21,250,000	-	-	0.035
se	0.32	0.68			1	5,920,000	12,580,000	-	-	0.031
si	0.04	0.96			1	121,676	2,920,212	-	-	0.005
sk	0.00	1.00			1	-	3,450,000	-	-	0.006
All (=29, unweighted average)	23%	77%	46%	17%	83%	154,735,993	447,888,309	59%	34%	66%

This table represents the results of the national film funds' questionnaire relating to three issues: the balance between automatic and selective schemes, the availability of tax incentives, and the decision-making process for funding – individuals or committees responsible.

	Automatic Schemes unweighted	Selective Schemes unweighted	Tax incentives unweighted (1 = yes)	Decisions taken by an individual unweighted	Decisions taken by committee unweighted
All (weighted average)	26%	74%	59%	34%	66%
big (=5)	34%	66%	60%	40%	60%
S (=15)	14%	86%	40%	13%	87%
SS (=9)	30%	70%	44%	11%	89%
CEE (=8)	9%	91%	25%	13%	88%
Nordic (=5)	15%	85%	40%	40%	60%
S & SS (=24)	20%	80%	42%	13%	88%

This table looks at patterns relating to seven categories: all countries, “Big” countries, “Small” countries, “Super-small” countries, “Central and Eastern European” countries and “Nordic” countries.

Automatic schemes are more significant in “Big” countries and “Super-small” countries.

Tax incentive schemes are more a feature in the “Big” countries and less in the “Central & Eastern” countries.

Decision-making tends to be done by individuals rather than by committees in the “Big” countries and the “Nordic” countries.

Colour code

BIG	France (fr), Germany (de), Italy (it), Spain (es), United Kingdom (gb)
SMALL	Austria (au), Belgium – francophone (bef), Belgium – flemish (bev), Czech Rep. (cz), Denmark (dk), Finland (fi), Greece (gr), Hungary (hu), Netherlands (nl), Norway (no), Poland (po), Portugal (pt), Slovak Rep. (sk), Sweden (se), Switzerland (ch)
SUPER-SMALL	Cyprus (cy), Estonia (ee), Iceland (is), Ireland (ie), Latvia (lv), Lithuania (lt), Luxemburg (lu), Malta (ma), Slovenia (si)
Central & Eastern Europe	Czech Rep. (cz), Estonia (ee), Hungary (hu), Latvia (lv), Lithuania (lt), Poland (po), Slovak Rep. (sk), Slovenia (si)
Nordic	Denmark (dk), Finland (fi), Iceland (is), Norway (no), Sweden (se)
Small & Super-small	All countries except the Big 5

LIST OF PARTICIPANTS

Country	First name	Last name	Organisation	Function
Australia	James	Cameron	Dep. of Communications, Information Technology and the Arts	Chief General Manager
Australia	Megan Simpson	Huberman	Australian Film Commission	Development Executive
Australia	Mary Anne	Reid	Australian Film Finance Corporation	Policy manager
Austria	Anissa	Baraka	Chancellery	Staff member
Austria	Mercedes	Echerer	EU-XXL	Director
Austria	Barbara	Fraenzen	ORF	Head of Fiction
Austria	Helmut	Grasser	Allegro Film	Managing Director, Producer
Austria	Thomas	Heskia	Vienna Film Fund	Controller
Austria	Gabriele	Kranzelbinder	Amour Fou Film	Managing Director, Producer
Austria	Danny	Krausz	DOR Film production	Producer
Austria	Erich	Lackner	Lotus Film	General Manager
Austria	Gerlinde	Seitner	Austrian Film Institute	Deputy to the Director
Austria	Götz	Spielmann	Association of Austrian Film Directors	Writer-Director
Austria	Roland	Teichmann	Austrian Film Institute	Director
Austria	Virgil	Widrich	Virgil Widrich Film & Multimediaproduktion	Director, Producer
Belgium	Jeanne	Brunfaut	Centre du Cinéma et de l'Audiovisuel de la Communauté française (CFWB), Belgium	Staff member
Belgium	Christian	De Schutter	Flanders Audiovisual Fund VAF	Head of Promotion and Communication
Belgium	Pierre	Drouot	Flemish Audiovisual Fund	Director
Belgium	Hans	Everaert	Flanders Audiovisual Fund VAF	Finance Director
Belgium	Gabrielle	Guallar	Kern European Affairs	Consultant
Belgium	Philippe	Kern	Kern European Affairs	Director
Belgium	Erwin	Provoost	MultiMediaGroup MMG	Head of Production
Belgium	Karla	Puttemans	Flanders Audiovisual Fund VAF	Head of Production Dep.
Bulgaria	Stanislav	Semerdjiev	National Academy of Film and theatre Arts Prof.dr.	Director
Canada	Wayne	Clarkson	Telefilm Canada	Executive Director
Cyprus	Yianna	Americanou	Media Desk Cyprus	Co-ordinator
Cyprus	Elena	Christodoulidou	Film Department of the Ministry of Education and Culture	Head of Department
Cyprus	Diomides	Nikita	Arvision Audiovisual Productions Ltd.	Producer/Director
Czech Rep.	Pavel	Strnad	Czech Film producers Association / Negative Film	President
Czech Rep.	Helena	Uldrichová	Barrandov Studios – Chair Czech Film Chamber	Managing Director
Denmark	Ib	Bondebjerg	Copenhagen University	Professor
Denmark	Henning	Camre	Danish Film Institute	CEO
Denmark	Ditte	Christiansen	DR TV	Deputy Head of Drama
Denmark	Nina	Crone	Crone Film	Producer
Denmark	Bo	Ehrhardt	Nimbus Film	Producer
Denmark	Stefan	Fjeldmark	A-FILM	Film director
Denmark	Anette	Funch Thomassen	North by Northwest – Media prg.	Head of Programme
Denmark	Marie	Gade	Zentropa Entertainments	Producer
Denmark	Peter	Garde	Zentropa Entertainments	CFO
Denmark	Anders	Geertsen	Danish Film Institute	Director, Distribution & Marketing
Denmark	Maja	Giese	Danish Film Institute	Head of Sales and Marketing
Denmark	Sisse	Graum	Zentropa Entertainments	Producer

Country	First name	Last name	Organisation	Function
Denmark	Camilla	Hammerich	TV 2	Head of Drama
Denmark	Lena	Hansson	Danish Film Institute	Film Consultant
Denmark	Lars	Hermann	Copenhagen Film Fund	Producer
Denmark	Claus	Hjorth	Danish Film Institute	Senior Adviser
Denmark	Lars	Kjeldgaard	Free lance + Danish Film School	Screenwriter
Denmark	Kim	Magnusson	Nordisk Film Production	Managing Director
Denmark	Tivi	Magnusson	M&M Production	Producer
Denmark	Marianne	Moritzen	Danish Film Institute	Head of Development Unit
Denmark	Per	Neumann	Bech-Bruun Law firm	Entertainment Lawyer
Denmark	Dan	Nissen	Danish Film Institute	Director, Cinematheque & Archive
Denmark	Ebbe	Nyvold	Danish Directors' Association	Chair / Director
Denmark	Michael	Obel	Thura Film	Producer
Denmark	Mikael	Olsen	Zentropa Entertainments	Producer
Denmark	Regitze	Oppenheim	Danish Film Institute	Consultant – ThinkTank Co-ordinator
Denmark	Tine	Pfeiffer	Alphaville Pictures	Producer
Denmark	Sandra	Piras	Directors Association	Head of Secretariat
Denmark	Jørgen	Ramskov	Danish Film Institute	Director Production & Development
Denmark	Thomas	Stenderup	Final-Cut	Producer
Denmark	Jesper	Strandgaard	Copenhagen Business School	Professor
Denmark	Katrine	Tarp	Ministry of Culture	Head of Section
Denmark	Louise	Vesth	Zentropa Entertainments	Producer
Denmark	Vinca	Wiedemann	Danish Film Institute, New Danish Screen	Artistic Director
Denmark	Peter	Aalbæk Jensen	Zentropa Entertainments	CEO
EC	Obhi	Chatterjee	European Commission	Staff member, DG Competition
Estonia	Marge	Liiske	Estonian Film Foundation	Managing Director
Europe	André	Lange	European Audiovisual Observatory	Head of Markets & Financing Information Department
Europe	Jan	Vandierendonck	Eurimages	Executive Secretary
Europe	Joseph	Vogten	European Investment Bank	Adviser
Finland	Petri	Kemppinen	Finnish Film Foundation	Consultant
Finland	Irina	Krohn	Finnish Film Foundation	Managing Director
Finland	Markus	Selin	Solar Films Inc.	Producer
France	Sylvain	Auzou	Giornati degli Autori	Head of International relations
France	Sophie	Bourdon	ACE	Director
France	Véronique	Cayla	CNC, Centre National de la Cinematographie, France	Director
France	David	Kessler	Radio France	Director France Culture
France	Cedomir	Kolar	A.S.A.P. films	Producer
France	Xavier	Merlin	CNC	Director, International Department
France	Alain	Modot	April / Media Consulting Group	Project Leader
Germany	Thierry	Baujard	Peacefulfish, Berlin	CEO
Germany	Peter	Carpentier	Chairman FERA	Director
Germany	Peter	Dinges	German Federal Film Board (FFA)	Director
Germany	Marion	Doering	EFA	Director
Germany	Svenja	Genthe		Assistant to Jonathan Davis
Germany	Eva	Hubert	Filmförderung Hamburg	Director

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Germany	Philippe	Kreuzer	Bavaria Film GmbH	Head of Film- and TV-Financing
Germany	Frank	Stehling	P.R.I.M.E	Director
Germany	Albert	Wiederspiel	Hamburg Film Festival	Director
Greece	Marcos	Holevas	Greek Film Centre	Board member
Hungary	Krisztina	Endrényi	Hungarian Motion Picture Pubic Foundation	Legal Counsel
Hungary	Tamás	Joó	Eurimages rep.	Consultant
Iceland	Laufey	Gu_jónsdóttir	Iceland Film Centre	Director
Ireland	Ralph	Christians	Magma Films	Producer
Ireland	Seamus	McSwiney		Film-maker and writer
Ireland	Simon	Perry	Irish Film Board	Chief Executive
Ireland	Victoria	Pope	Irish Film Board	Policy Executive
Israel	Katriel	Schory	Israel Film Fund	Executive Director
Italy	Elio	De Tullio	De Tullio Liberatore & Partners	IPR Attorney
Italy	Peter	Kruger	Tiscali	Consultant
Italy	Erik	Lambert	The Silver Lining Project, Rome	Director
Italy	Paola	Malanga	RAI Cinema	Head of Acquisitions
Italy	Alessandra	Priante	Cinecittà Holding SpA	Senior Analyst
Italy	Alessandro	Signetto	TISCALI	Consultant
Latvia	Ilze Gailite	Holmberg	Latvian Film Center	Managing Director
Lithuania	Renata	Sukaityte	Ministry of culture of the republic of Lithuania	Staff member
Luxembourg	Guy	Daleiden	Luxembourg Film Fund	Director
Luxembourg	Alan	Fountain	EAVE Media Programme	Director
Luxembourg	Jani	Thiltges	Samsa Film	CEO
Malta	Oliver	Mallia	Malta Film Commission	Film Commissioner
Netherlands	Toine	Berbers	Dutch Film Fund	Managing Director
Netherlands	Ate	de Jong	Mulholland Pictures	Producer/Director
Netherlands	Michiel	de Rooij	Bos Bros Film&TV Productions B.V.	Producer
Netherlands	Hans	de Weers	Egmond Film & Television	Producer
Netherlands	M.G.F.	Denessen	Denessen Media Consulting	Director
Netherlands	Petra	Goedings	Phanta Vision Film Int. B.V.	Producer
Netherlands	Hugo	Klaassen	Film Investors Netherlands BV	Managing Director
Netherlands	Leontine	Petit	Lemming Film	Producer
Netherlands	Kees	Ryninks	Dutch Film Fund	Head of Documentaries
Norway	Svend	Abrahamsen	Nordic Film & Television Fund	Director
Norway	Svein	Andersen	FilmCamp	Head
Norway	Jan Erik	Holst	Norwegian Film Institute	Area Director
Norway	John M.	Jacobsen	Filmkameratene AS	Producer/CEO
Norway	Leif Holst	Jensen	Norske Film&TV Producenters Forening	General Secretary
Norway	Nils	Klevjer Aas	Norwegian Film Fund	Special Advisor, Research and Policy
Norway	Marit	Sætre	Norwegian Film Fund	Head of Information
Poland	Stefan	Laudyn	Warsaw International Film Festival	Director
Poland	Agnieszka	Odorowicz	Polish Film Institute	Director
Poland	Dorota	Paciarelli	Polish Film Institute	Deputy Director
Portugal	Nuno	Fonseca	ICAM	Vice-President
Portugal	Hugo	Lourenco	ICAM	Staff member

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Portugal	Maria João	Sigalho	Rosa Filmes	Producer
Portugal	Maria	Taborda	Obercom	Researcher PHD student
Slovak Republic	Zuzana	Mistriková	The Ministry of Culture of the Slovak Republic	Director General
Slovenia	Igor	Korsic	Ministry of Culture	Professor, Strategic Advisor
Spain	Rosario	Alburquerque	ICAA	Staff member
Spain	Javier	Aragones	EGEDA	Lawyer
Spain	Fernando	Labrada	Media Research & Consultancy (MRC)	General manager
Spain	Pere	Roca	Centre de Desenvolupament Audiovisual	Head of Development
Spain	Antonio	Saura	Zebra Productions	Director General
Spain	Jose	Vicuna	Impala	President
Sweden	Anna	Boreson	Swedish Film Institute	Policy Co-ordinator
Sweden	Gunnar	Carlsson	Swedish Television	Head of Drama
Sweden	Peter	Hald	Swedish Film Institute	Head of Production
Sweden	Ralf	Ivarsson	Film I Skåne AB	Director
Switzerland	Nicolas	Bideau	Swiss Federal Office of Culture	Head of Cinema Section
Switzerland	Christof	Neracher	Hugo Film Productions	Producer
Switzerland	Rachel	Schmid	Media Desk Suisse	Director
Switzerland	Laurent	Steiert	Federal Office of Culture	Head of Automatic Funding
Switzerland	Gaetano	Stucchi		Media Consultant
Turkey	Azize	Tan	Istanbul Film Festival	Director
Turkey	Hüliia	Ucansu	Istanbul Film Festival	Former Director
UK	Peter	Buckingham	UK Film Council	Head of Exhibition and Distribution
UK	Carol	Comley	UK Film Council	Head of strategic dept.
UK	Jonathan	Davis	UK Film Council	Strategy Advisor
UK	Lizzie	Francke	EM Media	Executive Producer
UK	Gudie	Lawaetz	Farringdon Film	Director
UK	Jan Jacob	Lousberg	UK Film Council	Europe Executive
UK	Nadine	Luque	Vice Versa Films Ltd.	Producer
UK	Tina	McFarling	UKFC	Deputy head of communication
UK	Richard	Miller	Olsberg/SPI	Managing Director
UK	Norbert	Morawetz	University of Hertfordshire, Hatfield	Research fellow
UK	Phil	Parker		Producer/consultant
UK	Nik	Powell	National Film & Television School	Director
UK	Nick	Roddick	Split Screen	Consultant
UK	David	Thompson	BBC Films	Head
UK	Paul	Trijbits	UK Film Council	Head of New Cinema Fund
UK	Neil	Watson	Signature Media	Strategy Adviser, UK Film Council
UK	John	Woodward	UK Film Council	CEO
USA	Geoffrey	Gilmore	Sundance Institute	Director

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