



**Cultural mobility through
narrative media production
in the European cultural space**

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WP number and title: WP4 - Creative Industries: Media production and location marketing strategies for a transcultural European space

Task number and title: 4.5 - "Studying cultural mobility through narrative media production in the European cultural space"

Lead beneficiary: QUB
Type: Report Dissemination level:
Date of delivery: June 2021



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No. 770151

Executive Summary

This report presents research into the recently concluded Creative Europe Programme (2014-2020) to evaluate European supranational support for audiovisual production and circulation. By considering the production and distribution of contemporary European TV series and feature films, the report evaluates support strategies present in three targeted schemes: TV Programming, Distribution Selective and – to a lesser extent – Development of “Single Project” Audiovisual Content. **Part one** of the report focuses on TV production and distribution, while **part two** engages with the transnational distribution of feature films.

Within DETECT, this deliverable offers an ideal link between the research carried out in Work Package 4 – focussed on production – and Work Package 5 – dedicated to audiences and distribution – underlining the connections and interdependence between these two moments in the value chain. Moreover, European supranational policies have consistently set the mobility of cultural products across the European space as a priority, considering it not only as a crucial aspect for transnational collaborations and competitiveness of the audiovisual industries but also to promote the transfer of knowledge and an affirmation of European identity.

The research focussed on the Creative Europe Programme (2014-2020), framing the seven years of activity of the schemes analysed and retrospectively evaluating their objectives and accomplishments within this timeframe.

The report relies on data collection, qualitative methods of data analysis, policy analysis, and location studies to evaluate the impact of the support schemes on the promotion of cultural mobility through transnational collaborations and distribution. The policy analyses focused mainly on document analysis to evaluate how the schemes award the funding, and whether – and how – the policies’ objectives are achieved. Location studies allow the report to contextualise the findings against the country of origins of the stakeholders involved in production and distribution, offering an understanding of how the supports spread across EU countries. The analyses conducted in the report reveal an impactful imbalance in the use of supranational support to production and distribution. Some European areas are significantly underrepresented both in the applications made and in the funding awarded.

According to the objectives of DETECT project, and its focus on crime narratives, the datasets composed by this report also feature information on the genre classification of the funded projects. The data analysis and evaluation reveal the incidence of crime productions in Creative Europe supporting schemes, underlying a crucial difference between TV series and feature films regarding generic productions receiving funding. While the support for TV works seems to acknowledge the transnational popularity of the crime genre and its ability to meet a wider audience, the Distribution Selective scheme for feature films sees a dominance of drama productions, a more comprehensive generic label which also includes auteur cinema and the popular heritage genre.

Within the **Creative Europe Programme (2014-2020)**, the TV support scheme aimed to “increase the capacity of audiovisual operators to develop European audiovisual works with a potential to circulate in the EU and beyond and to facilitate European and international co-production”. This objective was achieved by supporting the production of TV programmes involving “at least three European broadcasters” from three different countries.

The evaluation of the awarded projects, done in **part 1** of the report, reveals how fiction productions supported by the TV scheme managed to achieve a wide transnational circulation and are good examples of co-productions and collaborations. However, the data also indicates that the programme’s composition and the key objectives to support collaborative productions with distribution potential instigated a **North-Western European bias**, limiting the competitiveness within the programme of independent productions from other regions. As a result, few countries with already interconnected audiovisual sectors were the regions that, effectively, benefitted the most from the programme.

The analysis of the **Distribution Selective scheme** revealed a similar imbalance with predominant support to films from the big 5 (France, Germany, Italy, Spain, UK), and only a total of 15 nations (and 152 films) which received funding from the scheme. While these numbers are a consequence of the disproportionate productive outcomes of a few countries, also powered by their sizeable internal market, they also reveal **the economic-oriented policy** of the scheme and the need to support a more diversified transnational circulation of audiovisual products.

Dr. Stefano Baschiera

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Introduction

Stefano Baschiera & Markus Schleich

Since the late 1980s, cultural mobility and collaboration across EU member states are at the centre of EU policies to support the European Screen industries. The different permutations of supranational supporting schemes underline two equally important objectives. The first is the creation of a single European market for the circulation of audiovisual goods across the EU member states. The second is the promotion and protection of cultural diversity across the nations.



Figure 1 Source www.emc-imc.org/

However, attempts made over the past 20 years to coordinate these two objectives led the audiovisual policies to the difficult reconciliation between economic and cultural goals.¹

This report considers the recently terminated Creative Europe Programme (2014-2020) to grasp how the policies' focus on the competitiveness and international reach of TV and film industries can lead to a lack of representation of state members without an already well-established audiovisual industry.

This deliverable is organised into two sections. The first focuses on TV production and distribution, evaluating the TV Programming scheme. The second section engages with the transnational distribution of feature films, evaluating support strategies present in two targeted schemes:

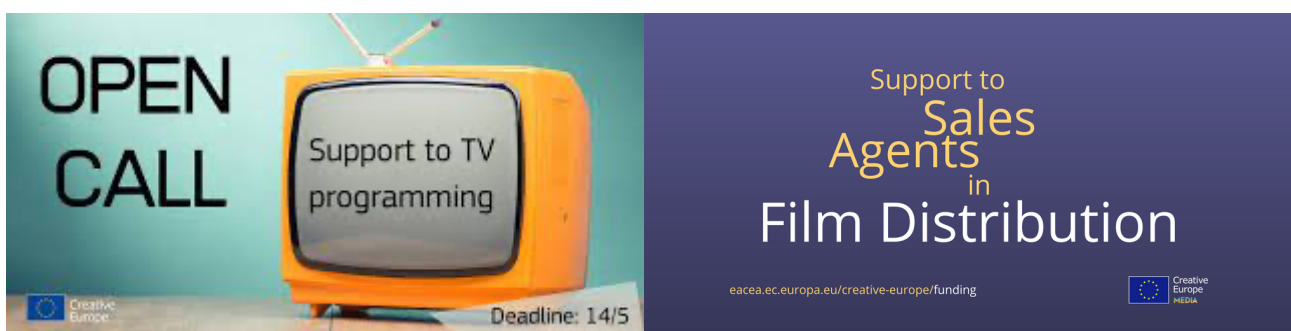


Figure 2 Source: TWITTER

¹ Herold, Anna; Golser Claudia (2018): Reconciling Economic and Cultural Goals in Film Policy Propositions from Europe. In Nolwenn Mingant and Cecilia Tirtaine (Eds.): Reconceptualizing Film Policies. New York and Abingdon: Routledge, pp. 198-204.

Distribution Selective and – to a lesser extent – Development of “Single Project” Audiovisual Content.

In this deliverable’s analyses, particular attention is given to the reach of the supranational support across the EU member states, and the role played by genre productions. We argue that the latter is of particular importance to balance economic demands and cultural goals, as they are a viable vehicle for diversity and self-representation of European cultures.

Creative Europe, popular genres, and cultural mobility

The MEDIA programme (*Measures pour Encourager le Développement de l’Industrie Audiovisuelle*) was the primary EU initiative supporting the European Screen Industries, including the promotion of cross-collaboration, cultural diversity, and circulation of audiovisual works across the member states. In other words, the MEDIA programme strives to support what this report refers to as “cultural mobility” through “the European cultural space”, i.e., the co-production, distribution, and potential circulation of cultural products with the ambition to service transcultural awareness of different cultures across the European continent.

MEDIA’s objectives identified the circulation of European audiovisual products as a crucial weakness in the screen industry and, over the years, dedicated 55% of the total budget to support distribution, promotion, and accessibility.



Figure 3 Source: www.creativeeuropeuk.eu

Looking at feature films, for instance, the share of European films in EU markets is consistently between 25% and 27%, percentages that are not affected by the growth of EU productions (Katsarova 2014). Therefore, making more films does not mean reaching a higher market share in non-national markets.

"While the overall film production in Europe witnessed a constant rise over the past decade, reaching in 2016 the record high number of 1603 feature films produced (including fiction and documentaries), the national box-offices and market shares are consistently dominated by fewer Hollywood productions (69.1% in 2013). While the EU investment in film production has doubled between 2001 and 2008 (reaching a total of 5.6 billion euro), it has generally lacked ambition and a selective approach."

(Baschiera & Di Chiara 2018: 249)

The support aimed at the distribution is important for the competitiveness of the European screen industries in a global market, and therefore for the financial implications that, from its introduction, dominated the vocabulary of MEDIA policies. Wider circulation of European audiovisual products also means a better opportunity to showcase representations of European heritage, diversity, and cultural identity across the member states.

Therefore, it is particularly important that European productions managed to circulate across the EU market and that such productions mirror the diversity present in Europe. According to the datasets collected, such diversity is arguably present in terms of genre belonging and artistic ambition of the audiovisual products; however, as we may see from the results of this report, more needs to be done to reach a more inclusive geographical representation.

Operating for over 20 years with a consistently expanded budget, MEDIA was surprisingly terminated in 2013 to become a subprogramme of the Creative Europe initiative - a decision which was met with concern by producers and filmmakers who signed a petition to reverse it, thus underlying the importance attributed to the programme itself.

The introduction of the Creative Europe Programme (2014-2020), which is the object of investigation of this report, continued to pursue the goals set by MEDIA and was therefore characterised by ongoing debates regarding the importance of supranational interventions in the audiovisual sector. Among these interventions, there was the need to maintain protectionist measures and recognise the cultural exception of European productions at the Transatlantic Trade and Investment Partnership agreement of 2013.²

Images of Europe through popular culture

As Mariana Liz, among others, pointed out, the debates about the conversion of the MEDIA programme were apt to perpetuate the division between “art and popular”, quickly dismissing the latter for lacking in cultural value. Popular European productions, however, reach a sizable audience and therefore generate “images of European society that will more clearly resonate with European citizens”,³ making them an ideal vehicle for Creative Europe’s objectives. Accordingly, the report presents datasets on the genre belonging to the projects supported by the schemes analysed to frame the role that popular culture plays in terms of cultural mobility and transnational appeal.

Considering that the audience-reach of European popular culture is mainly sizable in the national remit - while struggling to cross national borders - it can be argued that the European schemes supporting audiovisual circulation can be particularly effective with genre productions. Quality crime productions (both in feature films and high-end television) may be important vehicles of European identity both through an international reach and collaborations while simultaneously

² Liz, Mariana (2016). *Euro-Visions Europe in Contemporary Cinema*. London: Bloomsbury, p 31.

³ Liz, *Euro-Visions*, p. 31.

guaranteeing the level of competitiveness and economic potential that characterise the Creative Europe initiative.



Figure 4 Source: www.en.culture.aau.dk

Essentially, this report suggests that popular genres - most predominantly the crime genre - maintains long-term attention from audiences across different media, and for that reason also from especially TV producers. This indicates a closer historical affinity in TV production and broadcasting with popular culture since ratings and viewership have been significant tools of measurement for television. In contrast, European film support has a long history of public subsidy and a closer link to European art-house cinema, which means that the discourses around the two media in European funding practices are very different, although the evaluation criteria in the funding programmes share a range of similarities. In other words, in this report, we suggest that a vantage point for international circulation may be a more conspicuous embrace of popular genres by evaluators of proposals. In policymaking, it may be difficult to distinguish popular genres since this would most certainly spin into criticism from the perspective of protecting European art cinema. However, if the ambition is wide circulation and broad theatrical distribution, genre cinema may have a range of advantages both in reaching audiences and in finding collaborators in co-productions.



Figure 5 SOURCE: luxaward.eu

The intersection between two programme iterations

The report considers the Creative Europe programme (2014-2020) in its entirety, offering in this way an evaluation of the schemes analysed soon after they came to an end. Consequently, this deliverable has been prepared in the period between the end of the programme and the introduction of the new one.



Figure 6 Source Creative Europe programme (2021-2027),

The new iteration of the Creative Europe programme (2021-2027), launched on the 26th of May 2021, has a total budget of €2.4 billion, representing a 63% increase over the one analysed in this report (European Council 2021). It continues to feature MEDIA as a subprogramme and pursue cultural mobility objectives to “Strengthening the accessibility and visibility of European audiovisual works across platforms and borders”.

While this report could not analyse the details of the new programme, it is noteworthy the inclusion of “platforms” as well as the replacement of references to broadcasters by “audiovisual media service provider” in the vocabulary used to indicate an increased role played by online access to cultural products.

The changes brought forward by the new programme are also a helpful reminder of the adaptability and development of audiovisual policies. Albeit there is a commonality of the objectives of the support schemes, the way they inform the policies changes according to the cultural, economic, and political landscape. An evaluation of a Creative Europe programme, therefore, presents a snapshot of a particular period of screen production and of European culture, as well as a reflection on policy works.

Key questions

1. How do EU policies supporting audio-visual circulation operate?
2. How is the supranational support used by EU member states?
3. To what extent do genre productions benefit from supranational audiovisual policies?

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PART I – CREATIVE EUROPE' s Support for Television

1 Evaluation of Creative Europe support for television

Cathrin Bengesser and Kim Toft Hansen

1. Context

This section concerns the European support scheme for TV programming within the subprogramme MEDIA in Creative Europe (2014-2020), the European Commission's framework programme for support to the culture and audiovisual sectors. With the new policy incentives in the new framework programme for 2021-2027 recently published, this section inspects the achievements of and weaknesses in the latest TV support scheme within Creative Europe. As the DETECT project's research area is fiction, this section focuses on funding for fictional programming (not animation and documentary).

According to the TV scheme's description on the EC's website, the programme provided "opportunities for European production companies interested in producing a television work". The TV support scheme specifically aimed to "increase the capacity of audiovisual operators to develop European audiovisual works with a potential to circulate in the EU and beyond and to facilitate European and international co-production" by supporting the "production of TV programmes involving the participation of at least three European broadcasters" from three countries with up to €1m. Although the new programme maintains the overall internationalisation strategy, the evaluation criteria have changed considerably. For this reason, it appears timely to evaluate the effect of the 2014-20 TV support scheme.

2. Brief overview of findings

Based on a quantitative and qualitative evaluation of the awards between 2014 and 2020, it is evident that fiction productions supported by the scheme have successfully travelled across Europe and enabled co-productions that enrich the European imagery. At the same time, the data indicates that the programme's composition, as well as the goals to support TV with a European collaborative profile and distribution potential, have effectually incited a North-Western European bias, which limits the potential for independent producers and televisual culture from other regions to benefit from the programme's stimulus to international visibility, innovation and job creation.

In the period 2014-20, 63% of the grants for TV programming went to only five North-Western European applicants: France, Denmark, the UK, Germany and Sweden. In relation to TV fiction,

the North-Western bias becomes even more conspicuous, as 76% of the €49m in fiction award sums distributed in this period were awarded to production companies based in Sweden (22%), Germany (18%), Norway (14%), Denmark (12%) and France (12%). Altogether, this created a policy problem since few and rich countries with well-developed and already interconnected creative sectors were the regions that, effectively, received the programme's benefits of production support and transnational exposure of local co-productions.

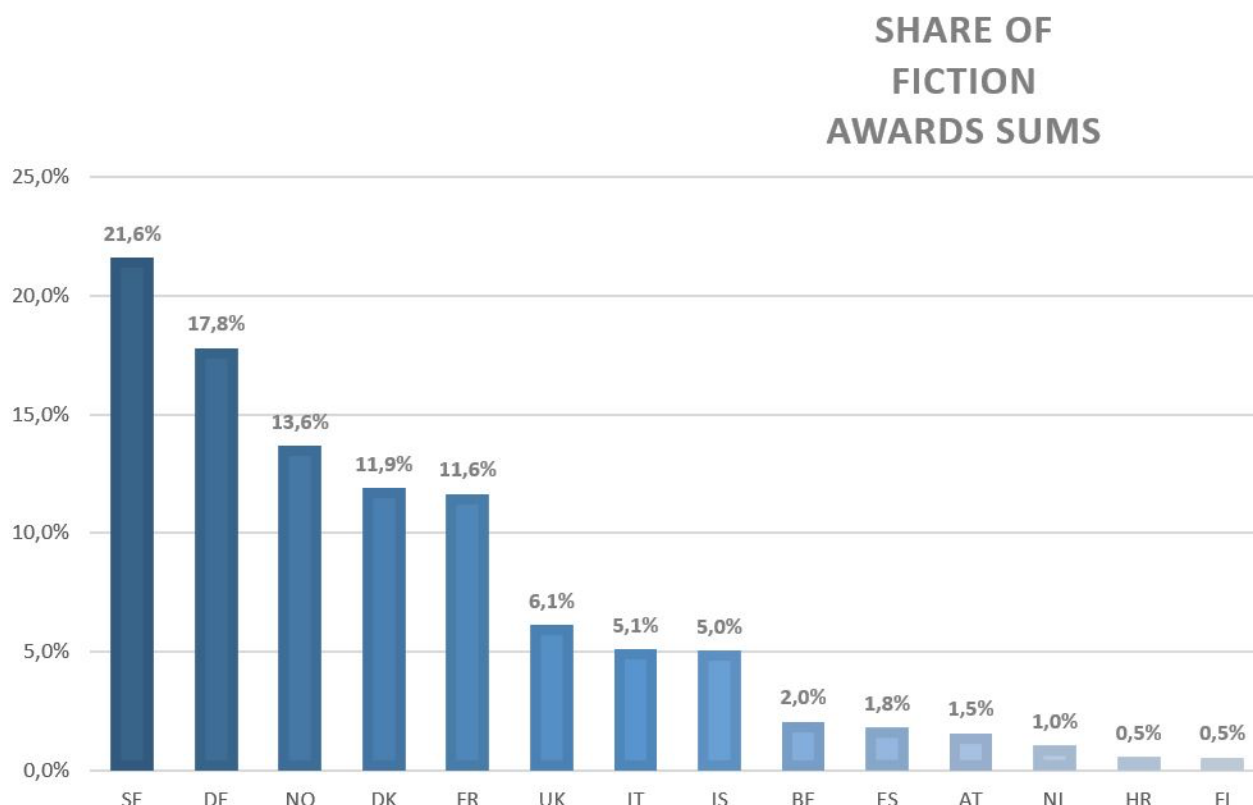


Figure 7. Distribution of fiction award sums in the TV Programming scheme (2014-2020)

3. Methodology

Quantitative data on Creative Europe TV fiction funding was collected through EACEA's website (Education, Audiovisual and Culture Executive Agency). The funding scheme had two annual rounds of application, which means that the main dataset for the TV funding scheme evaluation consists of a) 14 lists of "applications received by country" and b) 14 "lists of selected projects", all freely available online. Alongside this information, the success rate of applications received from each country was calculated. This compilation of data consisted of data on all TV programming co-funded by the Creative Europe programme, including factual programmes. For a closer inspection of the DETECT research focus, a second dataset was made consisting of only titles of fiction supported by the funding scheme.

Qualitative methods were used to annotate and evaluate the collected data. Each programme was qualitatively evaluated according to available information regarding genre, nationality of the applying production company, co-producing countries and primary locations. Such information was derived from credits, the *Internet Movie Database* (IMDb), and production companies' own genre qualifications. In addition, samples of the data were amended by additional research for specific programmes, including watching, annotating and genre qualifying the shows. The data quality was boosted further by information on original broadcasters. In the end, the fiction programmes co-funded by the Creative Europe TV scheme were broken down into six large estimated genre categories: crime, history, drama, fantasy, comedy and other (including unavailable genre affiliations).

To contextualise the data from the TV Programming applications and awards statistics, various reports from the European Audiovisual Observatory (EAO) were employed. In order to evaluate the potential influence of the countries' media systemic differences, the local audience share of national public service institutions was listed, based on data from the report *The Internationalisation of TV Audience Markets in Europe* (The European Audiovisual Observatory 2019). EAO reports (on TV fiction production and the presence of European TV in VoD catalogues) provided the basis for evaluating how aligned the production landscapes and distribution patterns of the countries receiving most grants were with the TV Programming scheme's evaluation criteria. Finally, our analysis of the TV funding scheme was evaluated by European policymakers in online interviews and feedback sessions.⁴

The complete dataset was evaluated through media policy analysis and location studies. Media policy analysis, in the approach applied in this policy brief, studies media policies through document analysis, and measures to what extent the intentions behind the policies are realised. Location studies read the economic, political, aesthetic and practical circumstances regarding the place of producers, productions and broadcasters. This evaluation also entails representative cases with special attention towards the funding scheme and the international collaboration between co-producing and co-financing partners.

4. Applications and awards by country

Our analysis of the TV programming scheme's statistics shows that three-quarters of the fiction grants awarded went to only five territories: France, Denmark, the UK, Germany and Sweden. These are at the same time also the territories with the highest numbers of applications, although their success rates vary.

⁴ This includes online interviews with and feedback from Ene Katrine Rasmussen (Head of Office of Creative Europe Desk, Denmark), and an online feedback session with Matteo Solaro (Head of Sector TV Programming), Magdalena Dzbik (Policy Officer, Creative Europe Programme, Media Policy, AV sector support), Emmanuel Joly (Senior Expert, Audiovisual Industry and Media Support Programmes) and Jolien Willemsens (Head of sector for Development, MEDIA subprogramme, Creative Europe).

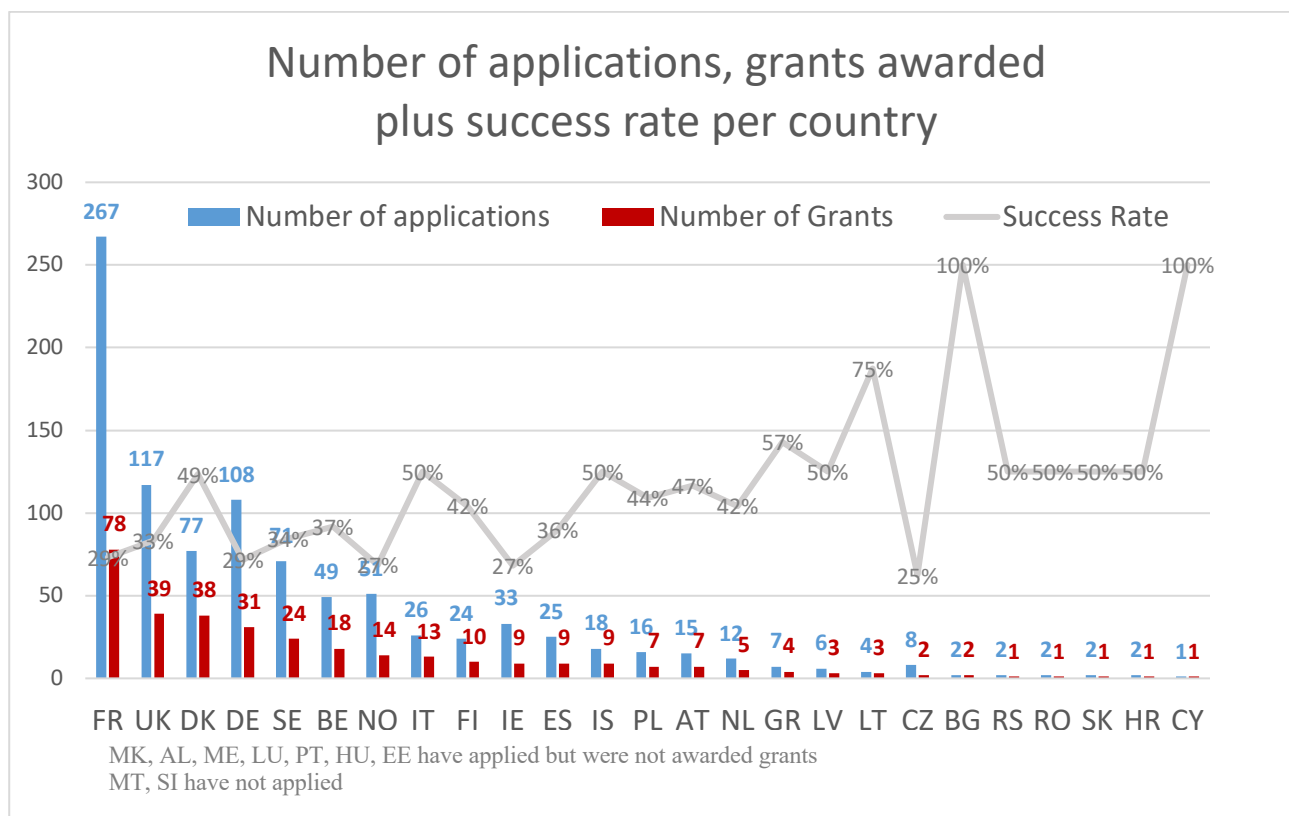


Figure 8. Number of applications and grants awarded for the TV Programming Scheme per country (this includes fiction, documentary and animation)

In the period, France, Germany and the UK were the biggest TV producing countries in Europe, accounting for 60% of the nearly 1.000 fiction titles produced per year in the EU between 2015 and 2018. Sweden produced on average 24 titles per year during the period, while Denmark produced 8 TV fiction titles in 2017.⁵ Both belong to the countries with medium or low production capacity, whose applications received five extra points in the evaluation for the programming scheme to support production in these countries.

⁵ Source: Fontaine, Gilles; Jimenez Pumares, Marta; Grece, Christian (2018): The production and circulation of TV fiction in the EU28. Television and VOD, p. 19. Available online at <https://rm.coe.int/the-production-and-circulation-of-tv-fiction-in-the-eu28-television-an/1680946229>.

NUMBER OF 2-13 EP. TV SERIES TITLES PRODUCED PER YEAR

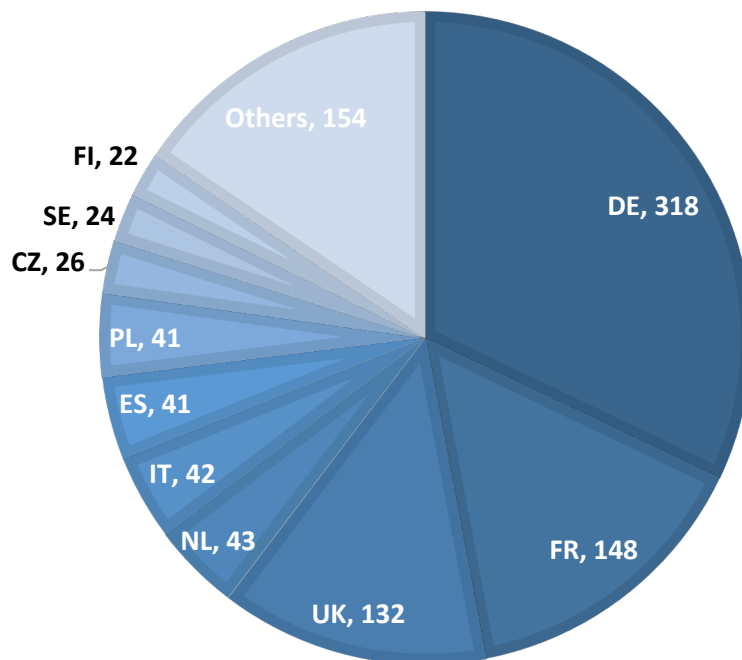


Figure 9 Number of 2-13 ep.TV series titles produced per year (seasons average 2015-18)⁶

Regarding the sum of awards for fiction production in the TV programming scheme, the three Scandinavian countries (DK, SE, NO) in fact accounted for more funding (€ 23.2m) than the big three fiction producers (DE, FR, UK), which received €17.5m of support. From this point of view, the TV Programming scheme sufficiently addressed the difference in production capacities between Europe's large and small nations. The dominance of France, Germany, the UK, Denmark and Sweden, however, implies that other countries do not receive support from the TV programming scheme to the same degree. Spain and Italy, for example, are also popular countries of origin in European subscription video-on-demand (SVoD) catalogues.

⁶ Source: Fontaine, Gilles (2020): Audiovisual fiction production in the European Union. 2019 Edition, p. 18. Available online at <https://rm.coe.int/audiovisual-fiction-production-in-the-eu-2019-edition/16809cfdda>, checked on 3/19/2021.

Spain is, in fact, a booming producer of internationally popular TV series. It has achieved broad international attention with series like *La casa de papel* (2017-), and investment in Spanish TV series has risen sharply since 2015. In 2019, Spain produced 40 high-end series.⁷ Yet, only 9 of the 330 fiction grants from the TV programming scheme have gone towards Spanish production companies, and less than €1m of the programming scheme went towards fiction production by Spanish companies. This imbalance was not due to the quality of their proposals since the Spanish applications achieved the average success rate of 35%, but due to a lack of applications. Spain only accounted for 2.6% of the applications. In the case of Italy, this is even more striking since Italian applications had a 50% success rate. Titles like *Gomorra* (2014-), currently available in 42 VoD catalogues in Europe, and the Netflix adaptation of *Suburra* (2017-) show that there is international demand for Italian content too. Therefore, the first caveat of the current distribution of TV programming funding was the lack of applications from countries with distribution potential outside the North-Western network.

| Country | Award sum in € |
|--------------|-------------------|
| Sweden | 10.630.000 |
| Germany | 8.760.000 |
| Norway | 6.725.000 |
| Denmark | 5.850.000 |
| France | 5.730.000 |
| UK | 3.000.000 |
| Italy | 2.500.000 |
| Iceland | 2.471.824 |
| Belgium | 1.000.000 |
| Spain | 871.552 |
| Austria | 750.000 |
| Netherlands | 500.000 |
| Croatia | 260.000 |
| Finland | 255.347 |
| TOTAL | 49.303.723 |

Figure 10. Sum of awards made to fiction productions per country

However, the reasons for the lack of applications may stem from media systemic differences as well as production environments in the Spanish creative sector, namely the strong presence of Netflix. Discussing the evaluation of the TV scheme, Ene Katrine Rasmussen stressed this specific point: “Like in Spain, Netflix has really drained the industry. That is also a reason why we haven’t seen so many Spanish applications in the last years because the whole Spanish production environment has been bought up by Netflix. So, why apply for TV Programming when you can get full financing from Netflix?” The above mentioned *La casa de papel* may be an illustrative case: Originally produced for the Spanish linear TV channel Antena 3, Netflix bought the global rights for the series after two linear seasons, re-edited the first two seasons for online re-distribution, and has since continued the franchise exclusively on the streaming service. Involvement of broadcasters and producers in other countries or a reverting of rights back to producers is opposed to globally operating streaming services’ strive for exclusive high-end content.

5. Potential for international circulation

The TV Programming scheme strove to support productions with the potential for international circulation on streaming and linear services. The content, origin and (co-)production profile of the supported fiction titles corresponded to this criterion. More than half of the fiction productions

⁷ Source: Fontaine, Gilles; Jimenez Pumares, Marta (2020): European high-end fiction series. State of play and trends, pp. 51-54. Available online at <https://rm.coe.int/european-high-end-fiction-series-state-of-play-and-trends-g-fontaine-a/16809f80cd>.

supported by the programming scheme belong to crime-related genres (thrillers, police procedurals, mysteries), which tend to circulate best internationally. The majority of the fiction productions supported by the TV programming scheme belong to the form of “high end” series with 3 to 13 episodes, which make up nearly half of SVoD service’s catalogues. This suggests that these series remains in high demand among streaming services looking for content on the international market.

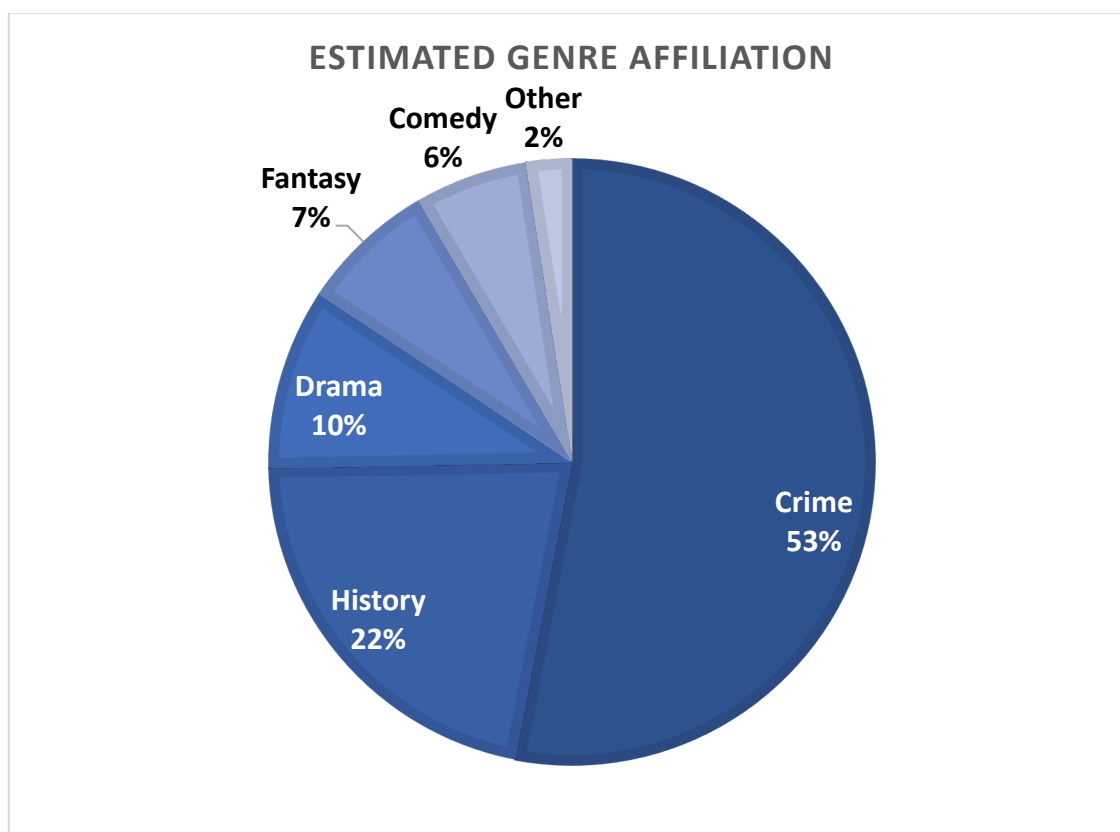


Figure 11 Genre affiliation of fiction TV series supported by the TV Programming scheme (2014-2020)

The five countries that received most of the grants were also the countries whose productions circulated best on streaming services in 2019: 82% of European titles on SVoD services available in the EU in 2019 came from the UK, France, Germany, Denmark and Sweden. The cases of Denmark and Sweden show that this popularity is not merely a reflection of production capacity since the small Nordic countries together provided 5% of EU SVoD titles, while Germany, the country with the highest production capacity, accounted for 9%.⁸

The TV Programming scheme supported landmark production from the big TV producers such as the acclaimed German crime series *Babylon Berlin* (2017-), but also internationally successful dramas from the “small” Nordic TV nations such as *Bron | Broen III* (SE/DK 2011-18). *Bron | Broen* has been sold to 157 territories and has thus been instrumental in creating worldwide visibility for

⁸ Grece, Christian; Jimenez Pumares, Marta (2019): Film and TV content in VOD catalogues. 2019 edition, p. 83. Available online at <https://rm.coe.int/film-and-tv-content-in-vod-catalogues-2019-edition/168098f119>.

Nordic TV drama. According to Peter Carlton,⁹ the British producer of *The Last Panthers* (F/UK 2015), the first crime series to receive €1m from the TV programming scheme, having the support of European funding makes drama more attractive to buyers and increases the prices they are willing to pay. Hence, in addition to going towards productions with high potential for international circulation due to genre and country of origin, the funding from the TV programming scheme may have had a positive impact on circulation and further funding opportunities.

6. Supporting co-production and cooperation

The second objective of the TV programming scheme was supporting international co-production and cooperation, which was reflected in the evaluation criterion that called for 'a European dimension' in the financing of the project and in the requirement that only productions with the participation of at least three broadcasters in three countries were eligible for support. The five countries which received most of the TV programming scheme's grants were also the most avid European participants in co-productions beyond the linguistic regions. Together they accounted for nearly 60% of the non-linguistic co-productions of 2-13 episode series produced in the EU between 2015 and 2018.

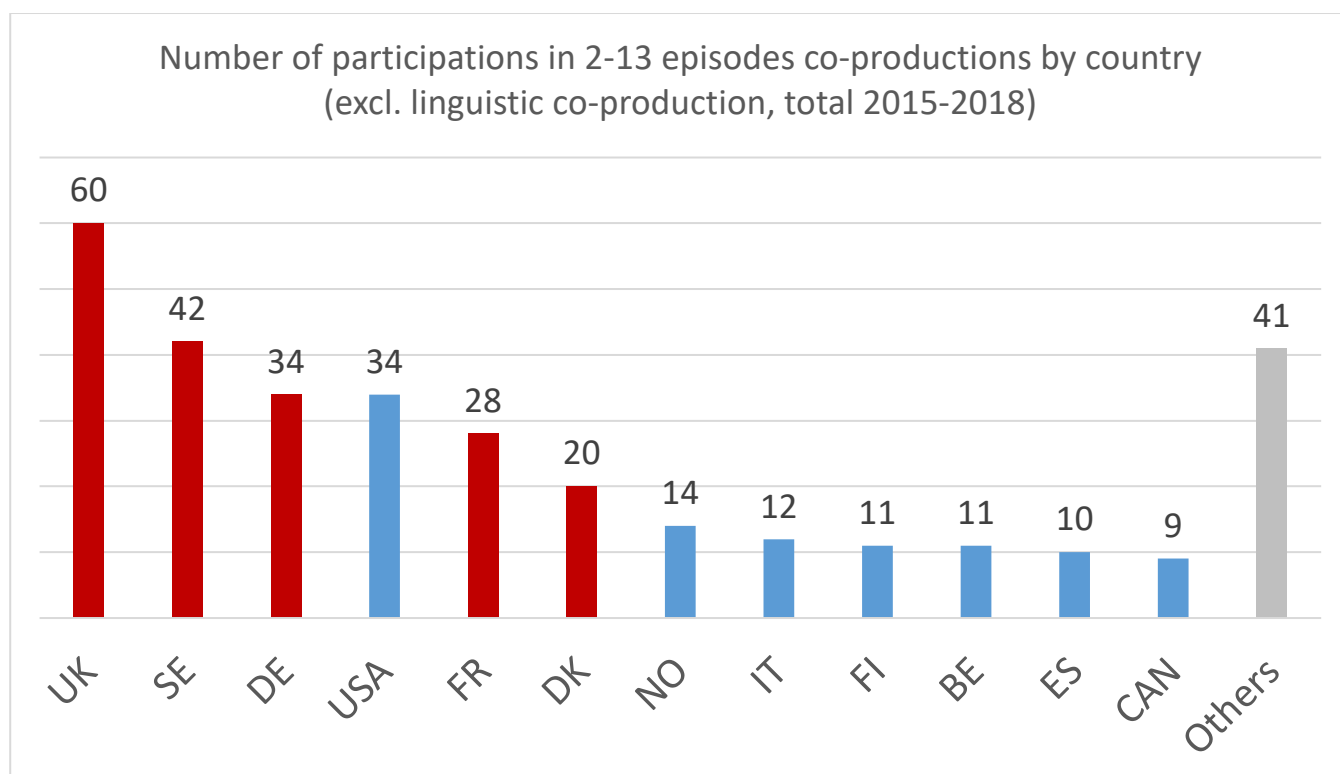


Figure 12. Number of participations in non-linguistic co-productions of 2-13 ep. series (total 2015-18)¹⁰

⁹ Dickens A (2016). This is Brexit. C21Media, 18 August. Available at: www.c21media.net/this-isbrexit/?ss=percent22the+last+pantherspercent22.

¹⁰ Source: Fontaine, Gilles (2020): Audiovisual fiction production in the European Union. 2019 Edition, p. 23. Available online at <https://rm.coe.int/audiovisual-fiction-production-in-the-eu-2019-edition/16809cfdda>.

In fact, the five countries have a prehistory of strong co-production and co-funding relationships among each other. Through both Nordvision and The Nordic Film and TV Fund, the Nordic countries have an institutionalised co-production relationship, while Swedish, Norwegian and Danish languages share similar linguistic features making them mutually understandable, although co-production between the three countries is not considered linguistic co-production. Since the early 1990s, German co-funding has been instrumental in boosting the production value of especially Danish and Swedish crime dramas as well as their international distribution. As a result, Nordic-German co-production was found in almost one in every four fiction titles supported by the TV programming scheme (23%), in which way the needed collaboration between at least three countries seemed almost mechanical in accessing funding from the TV programme. Therefore, the Scandinavian-Central European cluster was the strongest in the network of co-productions supported by the TV Programming scheme. The dominance of public service broadcasters in the region also contributed to the affinity between the partners, but cases like *Gidseltagningen* (DK/DE 2017-19) show that the public-private threshold may also be crossed following the (commercial) success of the Nordic/German co-produced shows.

The other central actor in co-productions was France, which developed its own network with Canada, the UK and Scandinavia. The programming scheme's support for co-production activities between Sweden and France in *Midnight Sun* (2018) or Denmark and France in *DNA* (2019) showed that the scheme helped to strengthen as well as instigate new constellations of cooperation between the five main beneficiaries, which also branched out into neighbouring territories. The Nordic countries Finland and Iceland were loosely integrated into both the Scandinavian and Franco-Nordic network. Co-productions beyond the main beneficiaries show no clear network. Instead, they can be classified as "occasional affinities" such as the Portuguese-Spanish co-production *Dry Water* (2020).

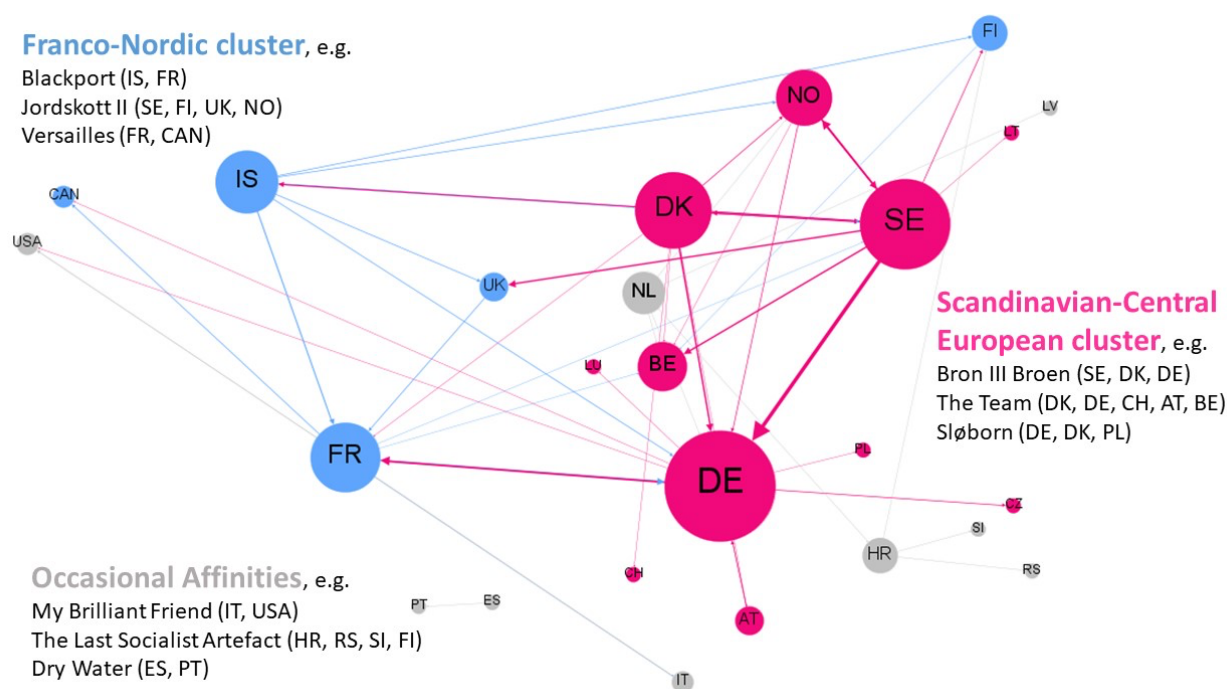


Figure 13 Network of co-production events (fiction) supported by the TV programming scheme (2014-2020) N 131

With the new Creative Europe programme even more focused on supporting co-production measures - within and beyond the TV scheme - there will potentially be more support to help grow such occasional affinities into networks of similar strength and durability as the existing clusters.

7. Supporting production beyond the North-West of Europe

While the 2014-20 TV programming scheme successfully supported fiction production in small North-European markets, it did not effectively reach the countries with limited production capacities in South-Eastern Europe, which are neither as well networked as the small Northern territories nor as sought-after on the global television market as productions from Spain and Italy. Among the fiction productions supported by the TV programming scheme, only one of the applying beneficiary production companies was located in Eastern Europe, i.e. Zagreb-based Kinorama, which received support for *The Last Socialist Artefact* in the ultimate funding round of the 2014-20 TV Programming scheme.

The volume of fiction production in the other Eastern European markets is comparable to the small Nordic nations. In contrast to the Nordic countries, the Eastern European TV producers did not benefit from international appeal like that of “Nordic Noir”, however, other reasons can be found in media-systemic differences. While the North-Western TV markets are mostly dominated by public service broadcasters, which tend to commission more fiction, the high-end series market in Eastern Europe is privately dominated. Services like HBO Europe have played an important role in

supporting the production of Eastern European series that follow trends like Nordic Noir and have the potential to travel, not least within the networks of the transnationally operating services.

Poland and the Czech Republic are connected to the Central-European Scandinavian network through Germany, but not as main applicants. Instead, Eastern European countries were present in the productions supported by the TV programming scheme as production services, locations or settings. The Danish-French *DNA* or the German *Das Boot* (2018-), for example, have partly been filmed in the Czech Republic. Co-production with partners in the Czech Republic is a means to access cheaper production resources on location and additional funding, e.g. through the Czech tax incentive which supported *Shadowplay* (DE/FR/CAN 2020-). The German-Danish pandemic thriller *Sløborn* was partly filmed in Poland, but, as is often the case for Eastern European locations, they were used as substitute locations for other cities or landscapes in Western Europe. In *Sløborn*, the Polish city Sopot and the region around Gdansk stand in for the coastal border region between Germany and Denmark.

While such funding constellations were in line with the TV programming scheme's evaluation criterion of a European dimension in the funding, they are nonetheless problematic. First, the use of Eastern European locations as substitutions for other places means that there is no recognisability that can be translated in follow-on business, like screen tourism. More importantly though, there is a risk that the TV programming scheme missed the opportunity to support stories from the South-East of Europe, which has been on the rise not only as a filming location but also as a setting for crime stories like *Mamon* (CZ 2015), *Valea mută* (RO 2016) or *Aranyélet* (HU 2015-18). These examples, examined in DETECT's report on *Location marketing and cultural tourism* (2020), integrated narrative and aesthetic traits from the internationally successful Nordic Noir stories, but transposed them for locations, societies and cultures of Eastern Europe. These HBO stories show the potential to expand and diversify the narratives of Europe.

8. Media systemic differences and ownership of rights

According to the feedback provided by Creative Europe contacts, explanations for the lack of applications from certain European territories may, however, be less tied to a mere lack of exposure of the funding instrument and more associated with media systemic differences.

According to the guidelines of the TV funding scheme, the "exploitation rights licensed to the broadcasters participating in the production have to revert to the producer after a maximum license period of [...] 7 years if the broadcaster's participation takes the form of a pre-sale; 10 years if the broadcaster's participation also takes the form of a co-production". Few private broadcasters follow these guidelines, and this most certainly explains why there are no applications from localised streaming services such as HBO Europe, as they retain the ownership rights much longer, not least because retaining exclusivity of (local) content is a core element of their strategy for attracting subscribers. In the case of the Czech Republic, the public service broadcaster CT retains

long-lasting broadcasting rights.¹¹ Arguably, the less powerful position of public broadcasters - due to scarce funding or limited audience reach - and more privately-owned services in especially Eastern Europe creates a media systemic difference, resulting in lower levels of public funding and more prevalent private interests in retaining ownership rights for longer than North-Western European public service broadcasters do and the Creative Europe guidelines demand.

In general, the Central and Eastern European markets are less export-oriented than the North-Western markets. Among the reasons for limited success in circulation Petr Szczepanik¹² lists shortage in financing, limited economies of scale in the home markets, lack of internationally established talent and high language barriers. Only the Czech Republic and Slovakia engage in significant mutual audiovisual trade between the two culturally intertwined countries.¹³

An additional reason for the lack of Eastern European co-producing partners may be more historic and economic. Historically, there are great differences between the decade-long evolution of media environments in the North-European public service-oriented cultures and the private economies of post-socialist Eastern European territories. At the same time, there are significant internal differences between the Eastern European media markets, which means that there are not the same natural affinities between broadcasters across borders. While Czech TV production depends largely on (still scarce) public funding, the Romanian high-end TV industry depends on the transnationally active services like HBO (cf. DETECT Deliverable 4.2). Different general economic systems and production costs for TV production also creates differences that influence ways of collaboration. On the one hand, a low-priced workforce establishes new opportunities for local production services, attracting foreign production to Eastern European territories, which may create local talent development and potentially local production hubs. On the other hand, the differences in production costs also result in a less level playing field, as the lower co-funding opportunities of Eastern European broadcasters and producers may be less attractive for comparatively affluent North-Western producers and broadcasters.

9. New routes for Creative Europe 2021-27

The new Creative Europe programme must take media systemic differences into consideration. Although the North-European co-productions carried with them an evident international exposure of European imaginaries, and although the Scandinavian TV crime traditions have had a noteworthy impact on many territories in Europe, a European audiovisual funding policy aimed at increasing

¹¹ See: Szczepanik, Petr (2018): Post-socialist producer. In *Critical Studies in Television* 13 (2), pp. 207-226. DOI: 10.1177/1749602018763546.

¹² Szczepanik, Petr (2020): Channels and Barriers of Cross-Border Online Circulation. Central and Eastern Europe as a Digital Periphery. In Petr Szczepanik, Pavel Zahrádka, Jakub Macek, Paul Stepan (Eds.): *Digital peripheries. The online circulation of audiovisual content from the small market perspective*. Cham: Springer Open (Springer series in media industries, 2523-3882), pp. 159-180.

¹³ See: Zahrádka, Pavel (2020): The Czech and Slovak Audiovisual Market as a Laboratory Experiment for the Digital Single Market in Europe. In Petr Szczepanik, Pavel Zahrádka, Jakub Macek, Paul Stepan (Eds.): *Digital peripheries. The online circulation of audiovisual content from the small market perspective*. Cham: Springer Open (Springer series in media industries, 2523-3882), pp. 101-121.

the diversity of European stories on screen must trigger a broader European perspective. One option for working towards more diversity in the applications and co-production constellations is re-evaluating geographical orientation in the point system.¹⁴ Within the new Creative Europe programme (2021-27), the TV Programming scheme has been re-launched as “TV and Online Content” support.¹⁵ The new programme’s reduction to only two - and not three - collaborators from different countries, as well as the consideration of market size, will certainly make it easier to establish “occasional affinities” and perhaps also make it easier for applicants to put together eligible projects. An increased focus on the track record of the international distributor and the quality of the distribution strategies may have an impact on the spread of European content.

The geographical imbalance between Eastern and Western Europe have been addressed by the new scheme to some degree by rewarding cooperation with “low-cost countries”, i.e. countries with limited audiovisual production capacity. These LCC countries are mostly located in Eastern Europe or are aspiring EU member states. The Scandinavian countries, which have so far disproportionately benefited from the TV programming scheme, are no longer part of the list of countries that bring extra points. This promises to encourage applications from high-production capacity countries that include an LCC partner. At the same time, the number of points to be gained by a partnership with an LCC country is below 5 and thus easily outweighed by professional distribution strategies. Production companies who lack network and experience on the international market, either because of their age, size or location, may be disadvantaged if they cannot secure support from high-profile distributors.

Therefore, there is a risk that this decrease may, in the end, have a negative impact on collaboration with less strong and distinctive production ecologies. Despite the change in the country classification, the guidelines appear to retain some of the geographical and productional biases that the actual programme seeks to counteract. It is, however, not within the scope of this chapter to critically scrutinise the new 2021-27 programme, whose effects can only be measured after the first application rounds.

10. Conclusion

The data and findings presented here expose a geographical imbalance in the support for high-end TV production through the 2014-20 TV programming scheme. This imbalance was, in part, due to the lack of applications from production companies in the South-East of Europe, but at the same time, it was also due to a dilemma at the heart of the programming scheme. The scheme strove

¹⁴ In order to redress imbalances in the TV funding scheme, the DETECT policy brief “Creative Europe’s Support for European TV Fiction Programming” (2020) proposes three measures for implementation within a new generation of the TV programming scheme in Creative Europe Media 2021-27, cf. the recommendations in the policy brief.

¹⁵ Creative Europe (2021): Call for Proposals. TV and online content (CREA-MEDIA-2021-TVONLINE). Version 1.0. Available online at <https://webgate.ec.europa.eu/ciccom/files/JDJ5JDEwJFN6L3VyLnZVTH-pHcDUxdHpjRWZwMy5BaWRTUi5vaU5sQWswVUdvREVIRlhndS9zdW1zS055/tplcalldocumentcreafinalversiononlinecleanpdf1622560503-en.pdf>, updated on 5/31/2021.

to support international co-productions with the potential to circulate in order to foster the distribution and visibility of high-end European TV fiction. Production environments in North-Western Europe had several advantages for making their case in applications for the TV programming scheme. The countries they are based in were already embedded in strong co-production networks that have gained a track record in internationally successful drama. This track record helped to make the case that the dramas would travel well, while past experiences in successfully marketing and selling the dramas abroad helped create credibility. Hence, awarding support from the TV programming scheme to production companies in France, Germany, the UK, Denmark, and Sweden had a self-confirming strong potential to yield good results, i.e. dramas that travel well across and beyond Europe. At the same time, production companies in other regions were missing out on the opportunities for increasing budgets, visibility and sales potential that comes with the EU funding. In a recent expert panel on the new Creative Europe programme organised by the Nordisk Film & TV Fund, “broadening participation” has been mentioned as a goal for the 2021-2017 funding round.¹⁶ The new TV Programming Scheme is an instrument that must strive towards a broader reach of the funds if the aim is wider European coverage.

With its support for high-quality fiction production in the small television markets of Northern Europe, the TV Programming scheme (2014-2020) actively contributed to and benefited from the international popularity of Nordic Noir TV Drama, which is now visible in the wide circulation of Nordic TV series on broadcast TV and European VoD platforms. Some of the series supported by the scheme have even circulated far beyond Europe. Furthermore, the TV Programming scheme furthered existing co-production and exchange networks within North-Western Europe and helped to motivate co-production constellation beyond neighbouring nations. This indicates that the policy goals of supporting productions with the potential for wide circulation and the goal of fostering transnational co-productions may have been partially achieved by way of this policy instrument.

Draining the local production environments, as in the case of Spain, may be criticised from a protectionist point of view, but at the same time, Netflix currently stimulates independent production in Spain without the need for public co-funding - a development local players may benefit from in the future. A new set of guidelines must, then, mark a shift towards the internet era without dis-incentivising the private stimulus of e.g. Netflix in Spain or HBO in Eastern Europe. At the same time, such endeavours must invest into future sustainability of such growth in production by supporting the development of domestic producers and audiovisual services with a need for original and licensed local content as well as an international mindset when it comes to financing and sales.

The main shortcoming of the 2014-20 TV programming scheme, evident from the evaluation of its fiction funding decisions, was the geographical imbalance that favoured production companies and media systems in North-Western Europe, a region characterised by mostly well-funded, well-connected, public-service dominated TV markets, which are now also benefitting from growing

¹⁶ The panel consisted of Lucía Recalde (Head of Unit Audiovisual Industry & Media Support Programmes), Senior Expert Emmanuel Joly, attended by Katrine Vogelsang (Head of Drama, TV2 Denmark) and Norwegian producer Gudny Hummelvoll (Hummel Film and president of the European Producers Club), moderated by Danish producer Thomas Gammeltoft (True Content Entertainment Creative Director). The panel debate is available online on the website of Nordic Film & TV Fund: <https://www.nordiskfilmogtvfond.com/news/stories/we-cant-do-it-alone-says-lucia-recalde-from-the-european-commission>.

local productions by international streaming services. TV producers in Southern and Eastern Europe hardly benefited from the scheme's budget-boost, increased distribution potential and support for transnational cooperation, while fiction producers in the East of Europe have not directly benefited from the programme at all. Increased awareness of the diversity of Europe's media systems, which goes much further than just differences between large and small countries, could help address the current imbalances.

PART II – CREATIVE EU- ROPE's Support for Feature Films

2 Evaluation of Creative Europe Support for Feature Films: Development and Distribution

Stefano Baschiera & Markus Schleich

1. Context

This section analyses the European film support scheme for “*Selective*” *Distribution support* and – to a lesser extent – *Development of “Single Project” Audiovisual Content* within the subprogramme MEDIA of Creative Europe (2014-2020), the European Commission’s framework programme for support to the culture and audiovisual sectors. As the new policy incentives in the new framework programme for 2021-2027 have just been released, this section examines the achievements and weaknesses of the latest support scheme for films within Creative Europe. As the DETECT project’s research area is crime fiction, this section focuses on funding for fictional programming, emphasising crime fiction even though the funding schemes are genre-agnostic and cover animated films and non-fictional formats such as documentaries.

According to the description for their support schemes on the EACEA’s website, the programme “enable the sectors to reach their economic potential, contributing to sustainable growth, jobs, and social cohesion” and “give Europe’s culture and media sectors access to new international opportunities, markets, and audiences.” The *Development of “Single Project” Audiovisual Content* is designed to “increase the capacity of audiovisual operators to develop projects with the potential to circulate throughout Europe and beyond, and to facilitate European and international co-production” whereas the main goal is to foster those films with an “enhanced cross-border circulation potential.” This call was open for all European production companies that have “been legally constituted for at least 12 months before the submission date, and that can demonstrate a recent success.” There are fixed lump sums for different applicants (€60.000 for animation, €25.000 for documentaries, €50.000 for feature films with a budget of €1.5M or higher and €30.000 for feature films with a budget below that).

The “*Selective*” *Distribution support* goes hand in hand with this and allows for “establishing systems of support for the distribution of non-national European films through theatrical distribution” as well “for international sales activities; in particular, the subtitling, dubbing and audio-description of audiovisual works”. Fostering a “wider trans-national distribution of recent non-national European films” by encouraging “the development of links between the production and distribution sector thus improving the competitive position of non-national European films.” 25% of the budget is allocated for films with a production budget of more than €10 million. Films with a smaller budget are eligible for grants between €10,000 and €150,000, which is to be awarded according to the country and the number of screens covered in the first week of release. A minimum of 7 different distributors must be attached to each project, with at least three from

high/medium capacity countries and two from small/very small capacity countries. Besides the “*Selective*” *Distribution support*, there also is the “*Automatic*” *Distribution support*, which unfortunately does not provide insights into which films received funding and which territories were covered.

2. Key Points

Through an evaluation of two European schemes aimed at the development and distribution of European films, it is possible to have a snapshot of the recent supranational support mechanism.

Based on a quantitative and qualitative evaluation of the two schemes between 2014 and 2020, it is evident that Creative Europe has successfully supported the development and circulation of non-national films across Europe, also by developing its criteria to focus on a wider circulation of fewer films. A comparison of the data suggests, however, that there is a significant gap between the countries which benefit from development funds and national productions that profit from distribution grants. The smaller nations do receive support to develop films, but the “new European voices” represented in these films struggle to find wider distribution. While 412 films from 27 nations received support for development, only 152 films from 15 countries obtained funding for distribution which indicates a substantial disconnection between these funds which should, in theory, allow for a lot of synergies. In practice, this is a potential shortcoming of these policies as countries (especially the EU-5) produce films that are already circulating better, which puts the proportionality of the grants given to countries such as France into question.

This ties in with another issue of the distribution scheme: the strong dominance of drama which takes up 52% of all funded projects. According to our data, drama travels widely but does not necessarily attract a lot of admissions which might be a fruitful base to explore the potential of popular genres such as crime, adventure, or horror to reach international audiences.

3. Creative Europe, Genre and Cultural Transnational Circulation

The Creative Europe Programme (2014-2020) further developed a series of key objectives already present in the precedent Media Programme (2007-2013), Media Mondus (2011-2013) and Culture Programme (2007-2013), which it replaced. Among such objectives, there was a focus on the distribution and promotion of films and audiovisual material to tackle the fragmented European audiovisual market and increase the transnational circulation of European audiovisual works.

However, from the vocabulary used in the first draft of the programme, and the debate emerging at its introduction,¹⁷ Creative Europe Programme also marked a further movement towards an

¹⁷ For an analysis on the cultural policy behind the Creative Europe Programme (2014-2020) see Bruell, Cornelia (2013): *Creative Europe 2014-2020: A New Programme - A New Cultural Policy as Well?* (2. überarb. Aufl.) (ifa

economic emphasis, with an accent on competitiveness and financeability of the works, underlining in its policies the “high commercial and circulation potential” of the films to be supported. Such policy’s vocabulary, focussed on economic logic, revealed attention towards a “market-oriented perspective” rather than European Cultural Heritage,¹⁸ opening up new discussions of the role played by genre cinema as a commercial and cultural product. Genre films, in fact, tend to be commercially viable in the national market but struggle to reach a transnational audience, making them, on paper, a viable candidate for the transnational circulation support offered by Creative Europe.

To promote the circulation of European works, Creative Europe’s support features targeted interventions on different players in the value chain, including training, development, distribution, exhibition, and audience. This analysis focuses on two moments in the value chain, the development stage and the theatrical distribution, both considered as areas of weakness in respect to Hollywood productions. The development support is aimed at independent productions with international potential, hence embedding the capacity for transnational mobility and collaboration at the early stages of the project development.

Instead, the support to theatrical distribution is particularly revealing because of three interconnected reasons. Firstly, the cultural capital associated with theatrical distribution is significant. Albeit the development of SVOD services removed some of the negative connotations of a film released straight to home video, the prestige acquired by a film through a theatrical run is undoubted, and the competition to reach the audiences very high. Secondly, theatrical distribution reveals the gatekeepers present in the EU audiovisual market (from language barriers to territorial rights agreements). One of the most challenging aspects of support to the audiovisual sector does not pertain to the production of new works but the availability and accessibility of the work produced. Therefore, transnational circulation is considered here as a key vehicle to move past the fragmentation of the European audiovisual market. Finally, the European Audiovisual Observatory closely monitors European films’ circulation across the member states, offering invaluable data for our analysis.

4. Methodology

Quantitative Data on Creative Europe film funding was collected through EACEA’s website (Education, Audiovisual and Culture Executive Agency). Both funding schemes have two annual rounds of application or calls, which results in a total of 14 “lists of selected projects”, all freely available online (for the development scheme, 2014 data was not readily available for the analysis). This compilation of data consisted of data on all programming co-funded by the Creative Europe Programme, including factual programmes. The funding scheme for *Support for Development of Audiovisual Content - Single Project* has proven to be a somewhat tricky dataset as the majority of titles given are working titles and can only be found at the MEDIA film database (cf.

Edition Culture and Foreign Policy). Stuttgart: ifa (Institut für Auslandsbeziehungen). <https://nbn-resolving.org/urn:nbn:de:0168-ssaoar-54757-2>.

¹⁸ Bruell, Creative Europe 2014-2020, p. 23.

<https://www.mfdb.eu>, established during the 2007-2013 MEDIA programme) without much information on the genre. Hence, we primarily use this dataset to compare it with findings from the *Distribution Selective scheme*. For a closer inspection of the DETECT research focus, a second dataset was made consisting of only titles of fiction supported by the funding scheme and manual addition of the respective project's genre.

Qualitative methods were used to annotate and evaluate the collected data. Each programme was qualitatively evaluated according to available information regarding genre, nationality of the applicants, and the awarded grants. The *Internet Movie Database* (IMDb) was consulted for genre information. The data quality was further supported by information from the Lumiere database on admissions of films released in Europe by the European Audiovisual Observatory (EAO). In a final step, all films supported by the Creative Europe TV scheme were broken down into the following genre categories: adventure, animation, comedy, crime, drama, fantasy, horror and music – which IMDb lists as a genre.

To contextualise the data from the TV Programming applications and awards statistics, we included reports from the EAO, e.g. *The Circulation of European Films in Non-National Markets. Key Figures 2019* (The European Audiovisual Observatory 2021) and *Fiction Film Financing in Europe: A Sample Analysis of Films Released in 2018* (The European Audiovisual Observatory 2020).

The data collection was evaluated through a policy analysis perspective to grasp the results of the objectives, strengths, and criteria of the programme. Particular attention was given to the territorial origin of the supported projects in order to map, on the one hand, the transnational reach of the funding programme and, on the other hand, to underline the existing fragmentation of the European Audiovisual market.

5. Development Grants for Feature Films

Between 2007 and 2016, more than 18,000 films were produced in Europe with an overall growth of 47%, from 1,444 feature films in 2007 to 2,124 in 2016.¹⁹ The analysis shows that for the development of feature films, the grants are distributed quite evenly in proportion to the respective size of the screen industries. Germany and France both secured far more than €1.5M each, with Germany claiming €1.86M and France €1.67M. The UK, Sweden, and Spain also surpassed the €1M mark, with countries such as Denmark and Italy close behind.

In the period between 2007 and 2016, France, Germany, Italy, Spain, and the UK were the biggest feature film producing territories in Europe (EU-5), accounting for over 50% of all feature films

¹⁹ Source: Talavera, Julio (2017): Film production in Europe Production volume, co-production and worldwide circulation, p. 1. Available online at <https://rm.coe.int/filmproductionineurope-2017-j-talavera-pdf/1680788952>.

produced in Europe (including countries such as Turkey and Russia) (54.2% in 2007-2015 and 50.9% in 2016)²⁰. For the EU, the number is 65%.

As the data from the EACEA does not provide data on the genre of the funded projects, and the majority of the projects seems to be not in production or have a new title, it becomes almost impossible to track them. The only insight the data provides is that from the 412 projects that received funding, 132 films have a budget below €1.5M and (which receive a lump sum of €30.000) with the remaining films being budgeted at €1.5M and more (which receive €50.000 in funding). Not a single animation or documentary has been funded (which receive €60.000 and €25.000 respectively).

Development of Audiovisual Content - Single Project

| Applicant Country | Grant |
|-------------------|---------|
| AL | 60000 |
| AT | 130000 |
| BA | 170000 |
| BE | 630000 |
| BG | 380000 |
| CY | 110000 |
| CZ | 810000 |
| DE | 1860000 |
| DK | 930000 |
| EE | 130000 |
| EL | 520000 |
| ES | 1140000 |
| FI | 430000 |
| FR | 1670000 |
| HR | 34000 |
| HU | 280000 |
| IE | 610000 |
| IS | 680000 |
| IT | 810000 |
| LT | 50000 |
| LU | 100000 |
| LV | 250000 |
| ME | 60000 |
| MK | 60000 |
| NL | 580000 |
| NO | 700000 |
| PL | 270000 |
| PT | 240000 |
| RO | 600000 |
| RS | 400000 |
| SE | 1150000 |
| SI | 370000 |
| SK | 450000 |
| UK | 1160000 |

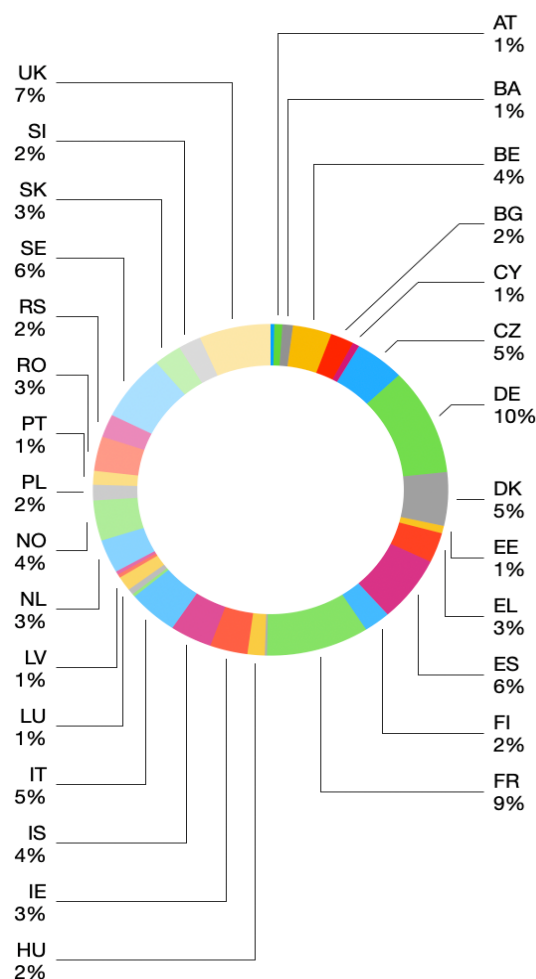


Figure 14 Grants per country for Development of Single Projects 2014-2020

²⁰ Source: Grece, Christian (2017): The circulation of EU non-national films. A sample study: Cinema, television and transactional video on-demand, p. 2. Available at <https://rm.coe.int/CoERMPublicCommonSearchServices/DisplayDCTMContent?documentId=09000016808b35a2>.

One aspect worth noting is the allocation of points to determine the suitability of the project. From the total 100 points, 55 were allocated to “relevance and European added-value”, consisting of the “quality of the project and the potential for European distribution and audience reach”. Up to 25 points were given for “dissemination of project results”, which evaluated the European and international distribution and marketing strategy. Another 10 points were attributed to the “quality of the content and [...] the development strategy”, and 10 points for financing strategy and “feasibility potential of the project”. Another 5 points could be awarded for projects that explicitly target audiences under 16 years old (with the exclusion of animation films). 80% of all available points were hence awarded for the feasibility of the project to find European/international distribution. As the following analysis illustrates, it is quite interesting that many of these films do not seem to benefit from the schemes that are meant to help these projects travel outside their domestic markets.

6. Distribution Grants for Feature Films

The selective distribution scheme did seek to support the theatrical distribution through marketing, branding, distribution, and exhibition of audiovisual works, which included “establishing systems of support for the distribution of non-national European films through theatrical distribution”, VOD platforms, and international sales activities. The support for films with a production budget of €10M and above was capped at 25% of the annual budget (€9.8M). The scheme covered up to 50% of the costs for third party P&A, and the tiers for the maximum support for the P&A were determined by the territories:

- Max €150.000 for FR, UK, ES, IT and DE
- Max €60.000 for AT, BE, NL, PL
- Max €30.000 for CZ, DK, FI, EL, HU, NO, PT, SE
- Max €10.000 for all the other territories.

In total, 100 points could be awarded to any proposal with different priorities compared to the development scheme:

1. 30 points for relevance and European added value: content relevance of the activity, including its international/European/regional dimension.
2. 45 points for the quality of the content and activities in terms of content and distribution strategies.
3. 15 points for communication and dissemination of project results, impact and sustainability.
4. 10 points for the coordination of and the method used by the applicant to distribute the fund to third parties, collect results, and report.

In 2019, the EAO recorded 7.821 European feature films, meaning that there was at least one admission in one cinema, including the domestic territory. As many of these films qualify as co-productions, the majority partner determines the location of origin for the production. At first glance, the international distribution of European export films appears healthy with 3.954 films (50%) screened outside the domestic market. However, the data also highlight a less convincing European distribution pattern. 28% (or 2.210) were screened in only one territory outside their home market. 8.5% (667 films) were released on two non-national markets. Only 5.2% (411 films) were released in 6 or more international markets, and these 5.2% comprises almost 80% of all European admissions for European films. Based on this, we may assume that European films travel, but most of them do not travel widely.²¹ Furthermore, the number of European films that are released outside their domestic territory may be rising, but theatrical admissions to these films are in decline.

From 2014 to 2019, France and the UK exported the most films to other territories in the EU. 905 French films and 458 British films travelled to non-domestic markets, followed by Germany with 401 films, Italy's 330 films, while Spanish films come in fifth with 160 films.²² The selected distribution scheme has supported productions such as the acclaimed German drama-comedy *Toni Erdmann* (2016) and the British drama *I, Daniel Blake* (2016) but also internationally successful films from other European nations such as the Hungarian *Saul Fia* (2015), the Polish *Ida* (2013), and many others which certainly helped to bring new voices to European audiences. In terms of diversification, however, the scheme is not that straightforward.

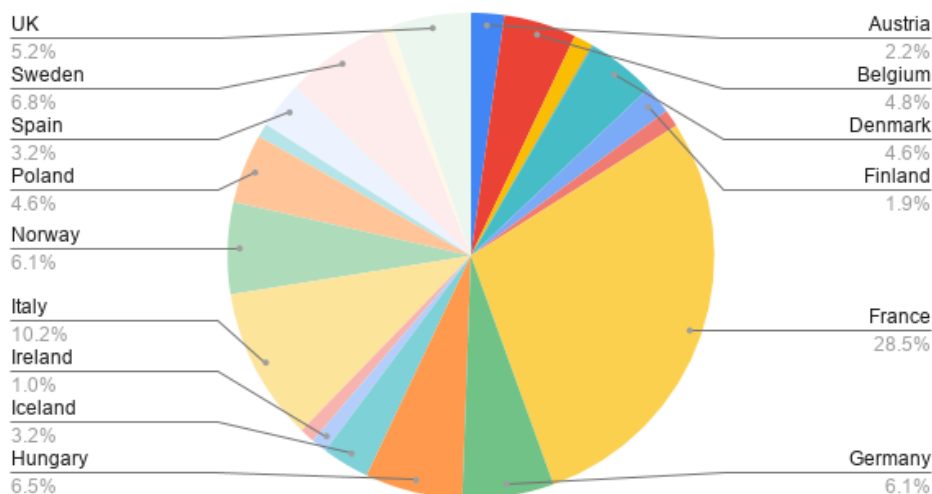


Figure 15: Percentage of applications per country of production for the Selective Distribution Scheme (majority co-production partner)

From 2014-2020, the scheme registered 2.407 applications for selective distribution support. Until 2018, every local distributor had to make a case for one specific film for each respective territory,

²¹ Source: Simone, Patrizia (2021): The circulation of European films in non-national markets. Key figures 2019, p. 68. Available online at: <https://rm.coe.int/export-2020-en-final-online-version/1680a1e35f>.

²² Simone, The circulation of European films, p. 68.

which changed in 2019 when the scheme supported a sales agent to pitch their project with an established network of distributors attached. Of these 2.407 applications, 686 were for films from France, 289 from the UK, 266 from Italy, 148 from Germany, 76 from Spain, 156 Hungary, 111 from Denmark, 181 from Sweden, 74 from Finland, 22 from Romania, 116 from Belgium, 53 from Austria, 46 from Iceland, 151 from Norway, 111 from Poland, 24 from Ireland and 18 from Switzerland (there was also 1 for films from the USA and Canada each).

Until 2018, the data gives detailed information where the films within the *Selective Scheme* are exported to as each application comes from a specific importing country. Looking at the numbers, ‘import’ of films from 2014-2018 is far more evenly distributed:

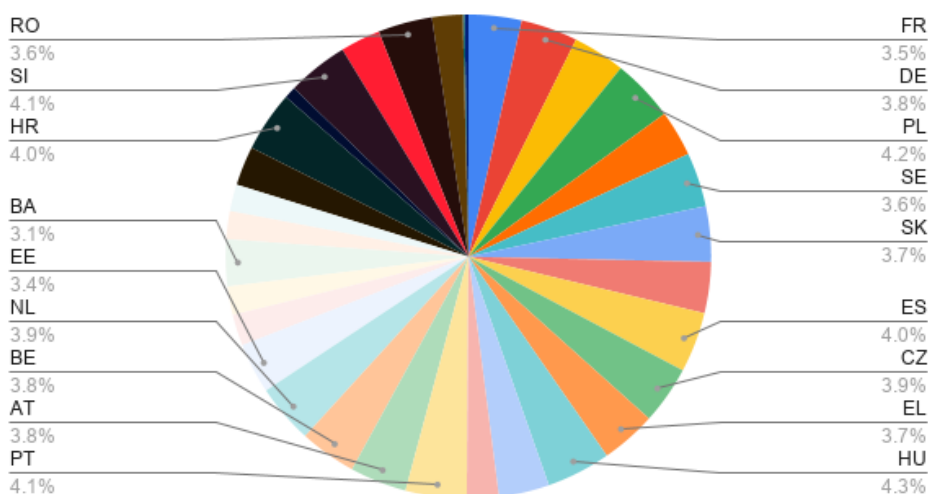


Figure 16: Countries benefiting from the Selected Distribution Scheme, percentage of applications

These 2.407 applications result, however, in only 152 films that received funding from 2014-2020, supported with total funding of approximately €66M. Though, if we look at these numbers not from the perspective of “applications per country” (which means an average of almost 16 applications per film) but as “budget per film”, the picture looks vastly different:

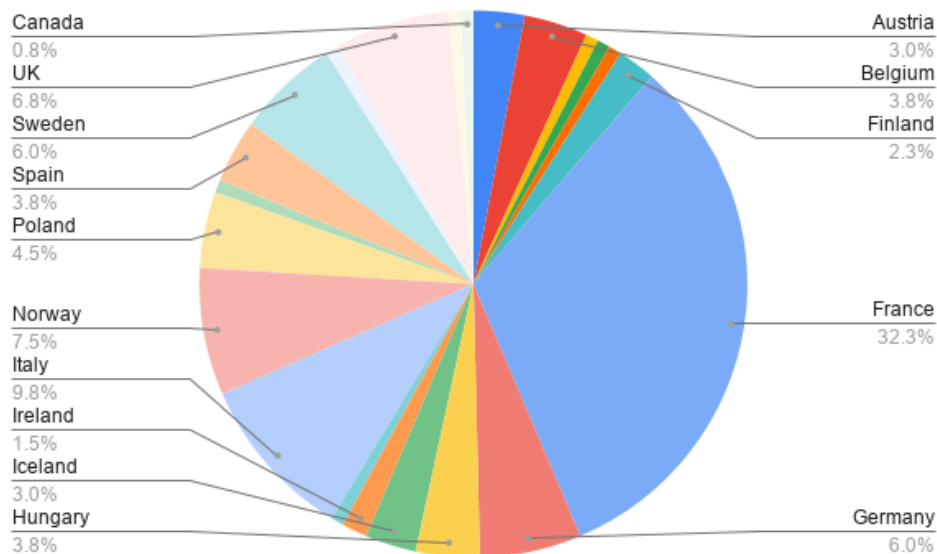


Figure 17: Percentage of successful applications per film for the Selected Distribution Scheme

Compared with the number of projects that secured funding for development per country, some discrepancies become obvious:

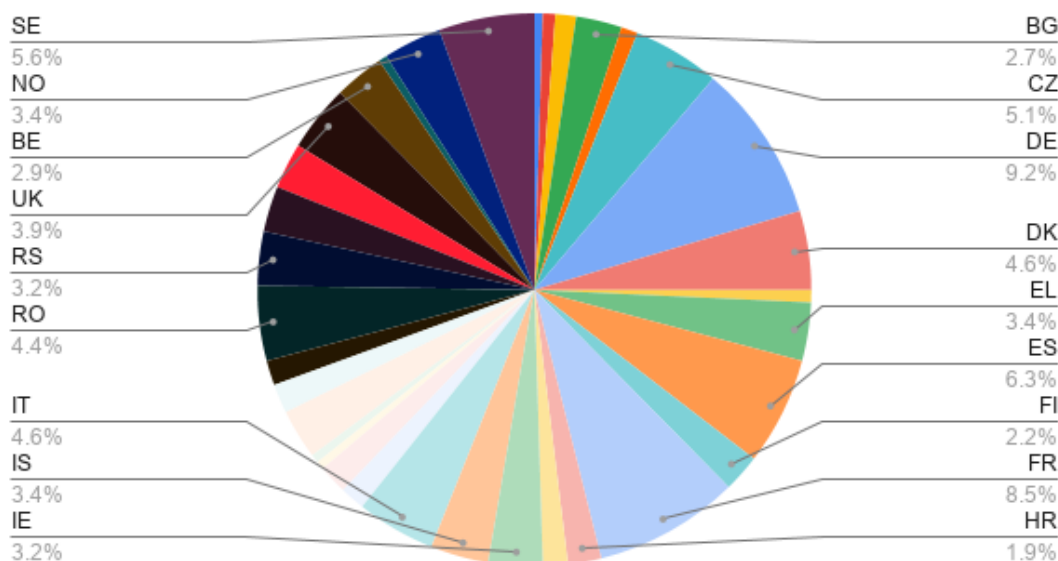


Figure 18: Percentage of funded projects for the Development Scheme

Broken down into different European blocs, it becomes clear that Northern Europe, given the size of the countries, takes an impressive 23% of all the funding, which is more than Eastern and Southern Europe combined.

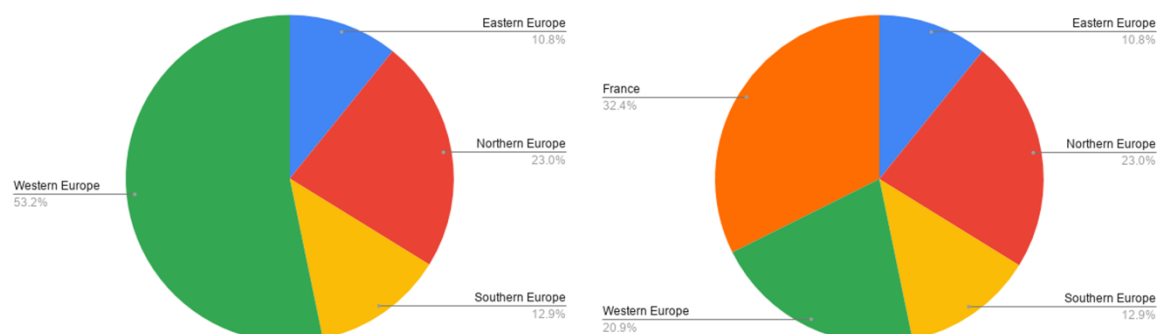


Figure 19: Percentage of greenlit applications of the Distribution Scheme. Left: Western Europe includes France. Right: France is listed independently.

While Western Europe takes over 50% of all available funding, France alone accumulates 32% of all funding which is more than any other country or even more than any other bloc besides Western Europe.

The discrepancy between the countries in which a single project have received development funding compared to the national films' markets that have been supported for selected distribution is significant: Films from France, UK, Spain, Italy, Hungary, Denmark, Norway, Sweden, Finland, Romania, Belgium, Austria, Iceland, Poland, Ireland, and Switzerland all receive support from both schemes, whereas Slovakia, Slovenia, Luxembourg, Lithuania, Austria, Portugal, Czech Republic, Cypress, Estonia, and Greece only benefit from the development scheme. This means that the outspoken encouragement for a wider non-national distribution of recent non-national European films does not manage to offer support to small/very small capacity countries which potentially struggle the most to reach new audiences.

7. Genre-Affiliations

Within the framework of DETECT's research, the question of genre takes centre stage. National and supranational support schemes are usually genre-agnostic. The development scheme is unusable for questions of genre as it is nearly impossible to find matches for the working titles on IMDB. For the selective distribution scheme, identifying the genre in question is easily done as these films have all entered post-production by the time they receive funding for distribution which makes them easy to find on IMDB. It is worth noting that the calls for both schemes made no explicit reference to genre, indicating a lack of importance in relation to applying and funding. The viability of the projects in terms of "theatrical distribution through marketing, branding, and exhibition of audiovisual works" is at the forefront. It aims to "encourage and support the wider non-national distribution of recent non-national European films by encouraging theatrical distributors to invest in promotion and adequate distribution" of European films, "thus improving the competitive position" of such films. It is hence useful to recall that of the maximum 100 points that could be assigned to a single project, 55 are for the relevance of the project within a frame-

work of “European added-value”, which determines the quality of the project based on its potential for European distribution and audience reach. This seems to indicate that a wide circulation of non-national films, and hence the possible popularity of a chosen project, are *sine qua non*.

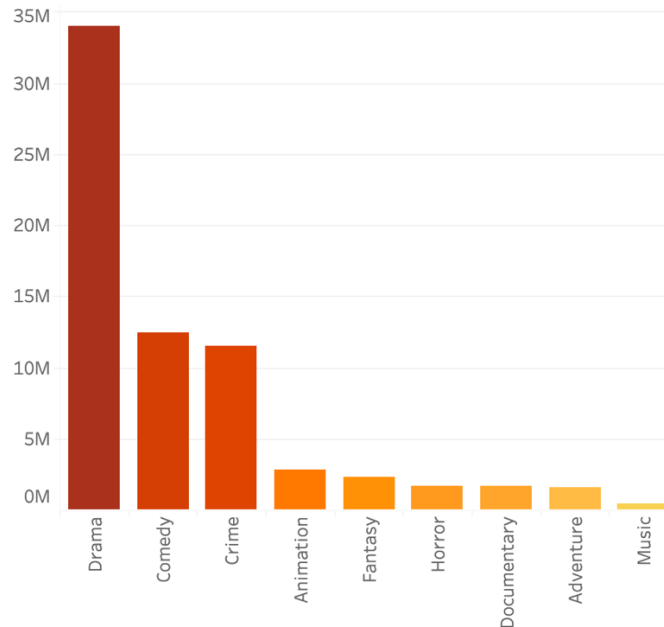


Figure 20: Genre affiliation of films supported by the selective distributed scheme (2014-2020)

Breaking the applications down by genre, it becomes clear that drama, as a genre, receives 52% (€34m) of the entire budget of €66, followed by comedy with 12%, crime at 11%. Animation, adventure, horror, documentaries, and fantasy sit around 5% each. There are some obvious reasons why drama rules supreme, given that the genre classification of drama is more inclusive than, for instance, crime or adventure. However, the dominance of drama necessitates a deeper look. There was a total of 668 successful applications (27.7% of 2.407 funded projects), which qualify as drama according to IMDB. A staggering 448 (18%) of those are French projects. As outlined before, the number of projects is not overly telling as the funding mechanisms have been changed away from local distributors to sales agents with a network of international distributors attached. Therefore, a look at the approved funds is more telling: French drama takes €10.3m of the total funding.

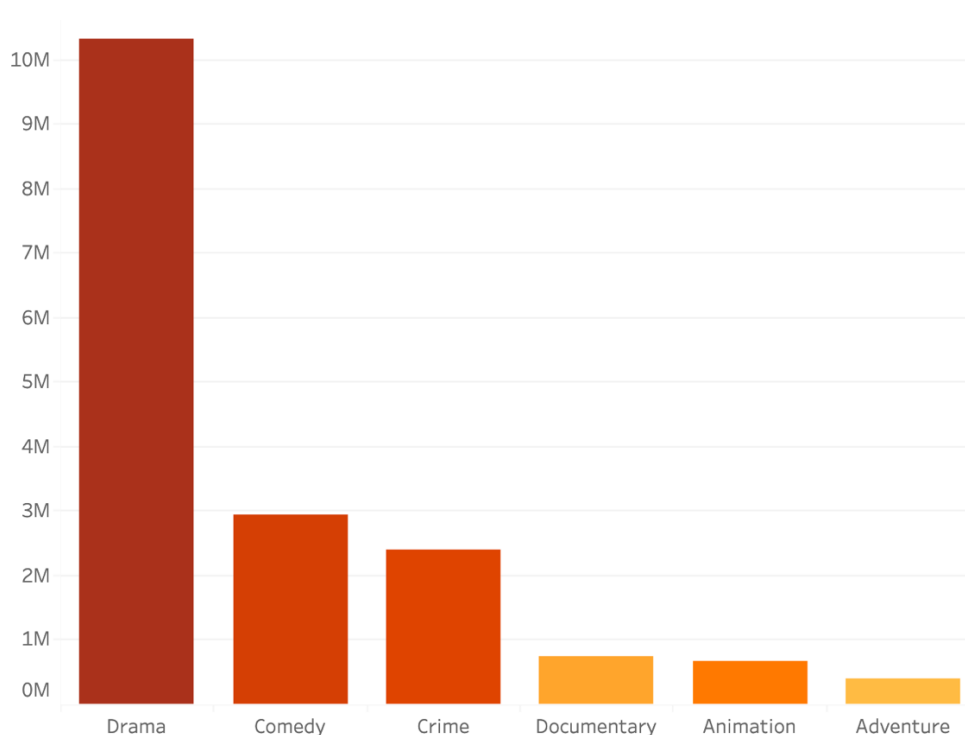


Figure 21 Genre affiliation of French films supported by the selective distributed scheme (2014-2020)

To put this into perspective: €10.3 equals 15.6% of all funded project. It is noteworthy that French drama takes up as much budget as the genres of crime or comedy in total from all European projects. Given that the funding scheme heavily focuses on supporting projects which facilitate the dissemination of European films among its member states that potentially draw larger audiences, the faith in drama in general and French drama, in particular, appears to be significant.

It is significant that these numbers diverge heavily from the distribution of genre for television, where more than half of the fiction productions supported by the programming scheme belong to crime-related genres (thrillers, police procedurals, mysteries), which tend to circulate best internationally, whereas drama only receives 10% of the funding (and comedy only accounts for 6% of all funding).

A study conducted in 2012 about the popularity of film genres in five European countries between 2006 and 2010 reveals an interesting picture.²³

²³ Source: Redfern, Nick (2012): Genre Trends in Five European Countries. Available online at: <https://nickredfern.files.wordpress.com/2012/10/nick-redfern-genre-trends-in-five-european-countries.pdf>

| | | Action/ Adventure | Comedy | Crime/ Thriller | Drama |
|---------|--------------|----------------------|--------|--------------------|--------|
| France | Total (\$m) | 789.14 | 926.28 | 367.67 | 592.94 |
| | N | 39 | 44 | 28 | 42 |
| | Median (\$m) | 16.65 | 12.98 | 11.82 | 10.16 |
| Germany | Total (\$m) | 758.88 | 603.30 | 252.62 | 414.72 |
| | N | 39 | 49 | 16 | 31 |
| | Median (\$m) | 14.62 | 11.73 | 10.95 | 10.26 |
| Italy | Total (\$m) | 404.08 | 796.97 | 275.30 | 278.40 |
| | N | 36 | 56 | 24 | 32 |
| | Median (\$m) | 10.13 | 10.31 | 7.68 | 8.27 |
| Spain | Total (\$m) | 620.19 | 216.01 | 362.41 | 371.97 |
| | N | 48 | 26 | 33 | 36 |
| | Median (\$m) | 11.26 | 8.29 | 8.12 | 9.31 |
| UK | Total (\$m) | 1441.32 | 906.20 | 368.12 | 308.65 |
| | N | 42 | 53 | 16 | 23 |
| | Median (\$m) | 24.56 | 12.88 | 15.40 | 12.16 |

Figure 22: Genre popularity of feature films in Europe's five biggest countries (2006–2010)²⁴

Within the data set, action and adventure attract by far the most admissions. To contextualise this, however, it is important to remember that action and adventure films, mainly from the US, qualify as blockbusters that take the lion share at the box office. Looking at the three other genres of interest for this report—comedy, crime, and drama—the distribution is quite balanced with slight differences across the different nations. In none of the examined countries does drama account for admissions that indicate a higher demand of interest than any of the other genres.

A look at the actual admission in Europe for films funded by the selected scheme also does not necessarily support that the chosen projects fulfil the criteria of a high potential for European distribution and audience reach, which, according to the guidelines of the scheme, are pivotal to secure backing. Within the top 10 funded projects, five films register as drama (highlighted in red)²⁵, and the remaining five are four comedies and one crime film. The higher amount of funding is a consequence of the scheme's strategy to award fewer films with bigger sums. However, films like *Supernova* (2019), *Napszalta* (2020), *Druk* (2020), *Falling* (2020), and *La paranza dei bambini* (2020) suffered from the effects of Covid19, which caused most cinemas to close for most of 2020. A film like *Supernova* only saw 215 admissions outside of Hungary, which translates into a subsidy of €4.393,11 per admission. Films that could not be distributed because of Covid-restrictions will be excluded from the following sample analysis.

| Project Title | € |
|--|-----------|
| LA PARANZA DEI BAMBINI (IT) | 1 098 122 |
| SUPERNOVA | 944 519 |
| NAPSZALLTA (HU) | 870 900 |
| I. DANIEL BLAKE | 863 700 |
| PRIDE | 854 200 |
| HAPPY END (BY M, HANEKE) | 840 000 |
| THE SQUARE | 831 200 |
| HUNDRAARINGEN SOM KLEV UT GENOM FÖNSTRET OCH.. | 828 700 |
| DRUK | 827 641 |
| FALLING | 825 908 |

Figure 23: Top 10 funding (drama highlighted)

²⁴ Legend: Total = the total accumulated grosses, median = box office grosses, along with the proportion of a country's total gross, N = number of the films accounted for in the sample per genre. The table contains European and non-European films screened in European cinemas.

²⁵ In 2020, *Druk* was categorised as a drama but in 2021 has been changed to comedy.

One could also make the case that the success of films such as *I, Daniel Blake* and *Happy End* are driven by the acclaim of their *auteur* directors (Ken Loach and Michael Haneke, respectively). Our analysis, however, cannot account for qualitative factors such as the popularity of the involved actors, directors, or source material.

As a sample, we analysed ten films in the genres drama, comedy, and all 18 crime films funded by the scheme (before Covid) in order to understand how many admissions could be generated with the help of the support scheme. We also considered horror films; however, there were only 3 films in the scheme. We have chosen these drama and comedy films at random and are aware that this small sample does not paint a full picture but merely serves as a snapshot which at least gives an indication of the subsidies per admission.²⁶

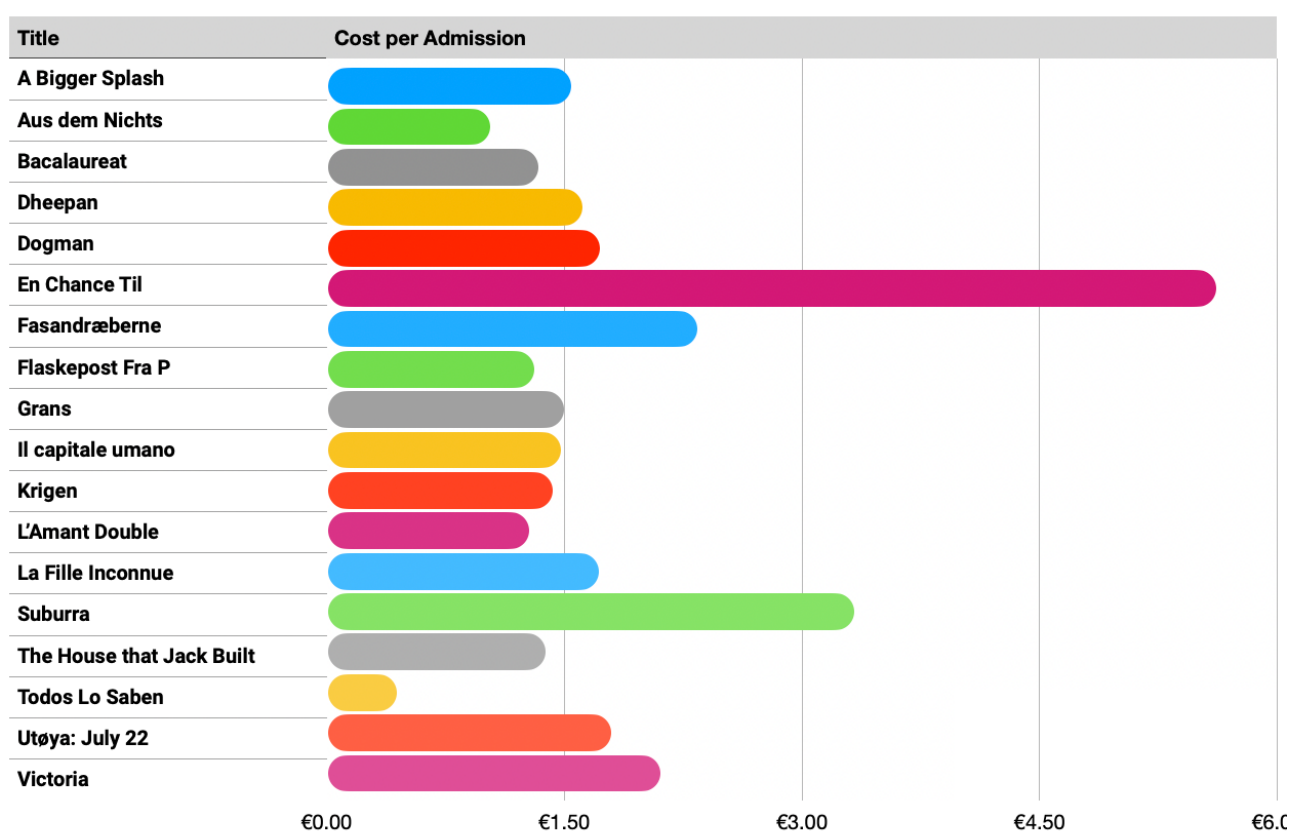


Figure 24: Crime Films. Cost per Admission

²⁶ For films released before 2018, the distribution can be tracked per country as each distributor had to apply. After 2018, the applications cannot be divided by country or territory anymore as they are tied to a sales agent with an undisclosed network of distributors.

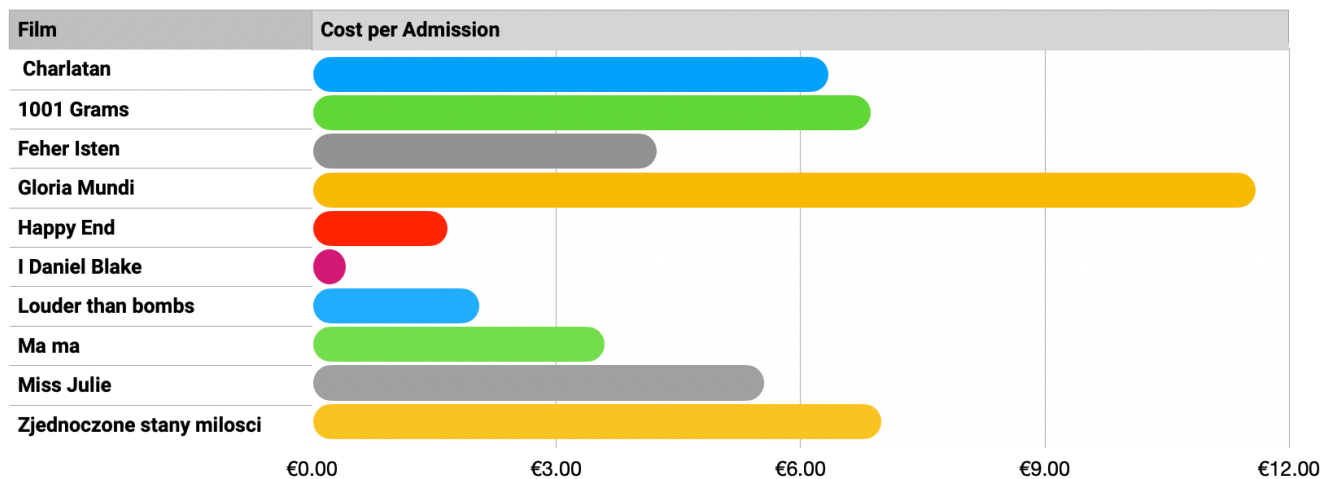


Figure 25: Drama Films. Price per Admission

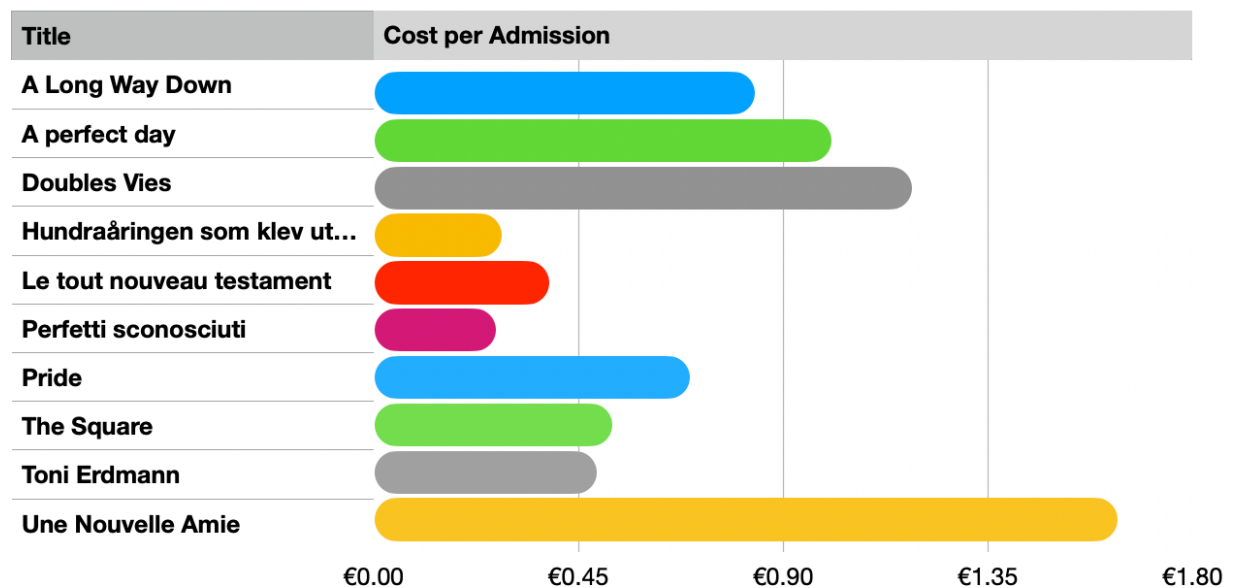


Figure 26: Comedy Films. Price per Admission.

Looking at the numbers, it does indeed look like adaptations such as *A Long Way Down*, *Hundraåringen som klev ut genom fönstret och försvann*, *Louder than Bombs*, *Fasandræberne* fare better than films not based on already published source material. As predicted, the involvement of certain *auteur* directors or international stars boosts a film and hence lowers the costs per admission.

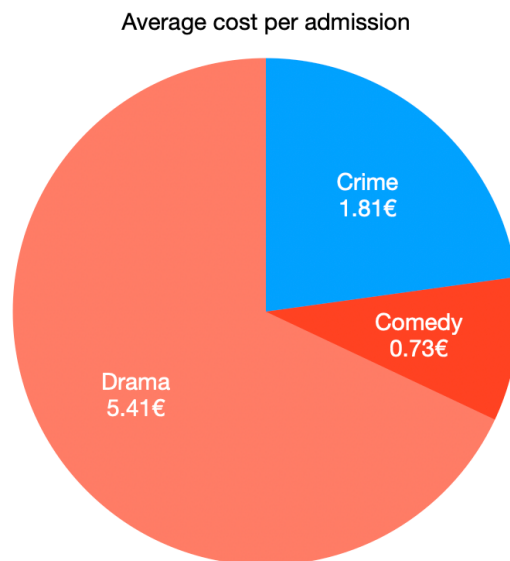


Figure 27: Average Admission Cost per Genre

On average, in our sample, one admission for a drama film commands €5.14, for a crime film €1.81 are needed, and for comedy €0.73 is required. This begs the question of a genre shift in the support scheme that would benefit a wider distribution for lesser money.

8. Conclusion: New routes for film support

The 2019 changes in support of transnational film distribution led to the backing of a smaller number of films with a higher budget. This led to more substantial results with respect to the fragmented scenario present during the first years of the programme and can be a trajectory for further support. It is noteworthy that data regarding the outcomes of the selected distribution scheme only tells the location of the sales agent, not the country of origin. Since this entails at least five national distributors, the data available is not very precise on matters pertaining to national belonging. Cross-referencing the nationality of the supported projects (considering the majority partner in co-productions), we can argue that while 27 countries (EU member states) successfully secured funds for developing products (without any extreme outliers), only fifteen countries received funding for distribution (with France taking 32% of all funding). The following countries miss out: Slovakia, Slovenia, Luxembourg, Lithuania, Latvia, Austria, Portugal, Czech Republic, Cyprus, Estonia, and Greece). It might be worth considering new incentives to distributors and sale agents to support the circulation of a wider array of national works, maybe linking such support to the development fund. In this way, if a project, which benefits from support at the development stage, manages to reach production, it automatically receives further help to reach wider visibility.

Another point worth making is one of necessity: Does a film from Oscar and multiple Palm d'Or winner Michael Haneke²⁷ really need such substantial support? Within the possibilities of the available funding, €840.000 is a significant amount to be dedicated to *Happy Ending*. The same could be said about adaptations of international best-sellers (Jonas Jonasson's *Hundraåringen som klev ut genom fönstret och försvann* would be one possible example) or films that have Hollywood stars attached to them (i.e. Mads Mikkelsen in *Druk* or Viggo Mortensen in *Falling*). It is very likely that these films would have found a wide European distribution without the additional support of Creative Europe.

The analysis shows that popular genres have a better chance of reaching transnational audiences. While the ubiquitous "drama" is the genre most conspicuous, a more systematic analysis of the projects' genre affiliation can be revealing on matters pertaining to audiences and marketing. More importantly, it can generate new reflections on the role of popular genres within European cultural heritage, revealing historical trends and textual characteristics.

²⁷ Whose prominence is of such importance that his name is attached directly in the application entry which reads *Happy End* (by M. Haneke). While the data available from CREATIVE EUROPE is by no means consistent (sometimes, the application will contain the country of origin), the director is usually not mentioned.

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