

CINE-REGIO

BUILDING BRIDGES

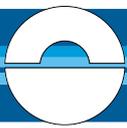
DIVERSITY IN EUROPEAN FILM

By Michael Gubbins, SampoMedia, 2016



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European network of regional film funds



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NOTES

Navigation

For ease of use, each chapter begins with a summary of key points. Actions and initiatives are marked in bold.

Terminology

- LBGT (Lesbian, bisexual, gay and transgender) will be used in discussions of sexuality and sexual identity.
- BAME (Black, Asian and minority ethnic) will be used as an overarching term in discussions of race and ethnicity.
- The term 'class' will be used in discussions of socio-economic issues. While the word comes with a degree of historical baggage, the author believes alternatives tend to depersonalise issues.

DIVERSITY POLICIES DO MATTER

In celebration of the CineRegio 10th Anniversary and ten years of promoting cultural diversity across Europe, we have commissioned the report *Building Bridges – Diversity in European Film*.

With this report, we hope to contribute to the creation of a framework for discussion about diversity.

By assessing actions and policies so far, combined with a sharp analysis of the current market situation we have a strong tool for the formulation of effective strategies, which will make a significant impact on diversity.

Michael Gubbins has once again taken up the challenge of providing us with new knowledge on a topic where there is a great need and yet little knowledge.

The report analyses and evaluates current and potential action to improve the diversity of European film. It argues that in order to ensure a flourishing future European film sector there is a need to build bridges between diversity in content creation and diversity in consumption.

Often the issues of content creation and consumption tend to be discussed in isolation. Our emphasis is on gender, age and social imbalance – and as with the three earlier reports – *Audience in the Mind* (2014), *The Active Audience* (2012) and *Engaging Audiences* (2011) by the same author – it will come as no surprise that the audience perspective is part of the solution.



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Effective action on diversity begins by building demand and engagement with audiences. As Gubbins puts it: "Diversity is the lifeblood of any art form".

We are very pleased that due to the generosity of Michael Gubbins and our sponsors – Film Väst (SE), Flanders Audiovisual Fund (BE) and Vienna Film Fund (AU) – the report is available as a free download from the CineRegio website.

Sharing of knowledge will move us all forward!

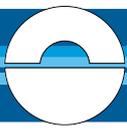
Enjoy the reading!

Charlotte Appelgren

General-Secretary, Cine-Regio (February 2016)

Sponsored by





EXECUTIVE SUMMARY

***Building Bridges* analyses, evaluates and offers a context to the current debate about diversity in the European film industry.**

It argues that film diversity is not one discussion but covers a complex range of issues, including:

- **Fairness in the film production sector:** Resolving alarming inequalities in who makes films.
- **Cultural diversity:** The variety of films made in Europe.
- **Audience development:** The creation and nurturing of diverse audiences for European films.

The discussion in film cannot be divorced from much bigger social and political questions about equality, democracy and inclusivity in a globalised digital economy.

Film diversity is one part of the European debates about multiculturalism; cultural cohesion; the meaning of cultural diversity in a digital age; the role of the state in culture, etc.

The scale of the challenges seems daunting, and so it is tempting to reduce each to its constituent parts to be tackled one at a time. The immediate focus has been on gender, inspired by a series of reports demonstrating shocking lack under-representation of women in leading creative roles, such as writer and director.

This report argues that the credibility of any long-term aspiration to diversity is indeed fatally undermined if it fails that first equality test – and it is important to remember that women are the majority of the population in every European country,

But there is a bigger, essential, and arguably existential debate, about European film. Diversity is the lifeblood of an art form. It is not just about equal opportunities for employment, it is about ensuring that film is a dynamic, representative and relevant means of expressing and sharing ideas across the spectrum of society.

In a digital age of vast choice and changing consumer habits, it is vital to approach diversity from the perspective of both producer and audience. Marrying consumer demand with sustainable models is the central digital challenge for film.

Broadening the diversity task is more complicated than trying to deal with specific symptoms of equality in turn but it is necessary and *Building Bridges* offers a framework for the discussion:

1. Identify the root causes of inequality
2. Set measurable objectives
3. Consult widely
4. Remove immediate barriers to access
5. Build bridges to increase engagement
6. Measure and share results

An important distinction is between removing barriers and building bridges. It is not enough to simply remove the obstacles to fair access to jobs; or to widen the theoretical access to films for audiences. Opening the doors does not mean anyone will come in.

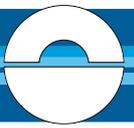
It is essential that film also takes active steps to engage under-represented sections of the population and to participate in film culture. Those are more challenging steps.

UNDER-REPRESENTED AND EXCLUDED

- Mounting evidence shows that women are grossly under-represented in key creative roles.
- Studies show that white men from relatively privileged backgrounds remain dominant.
- There are serious gaps in research, particularly relating to social class.
- In most areas, there are clear signs of progress but there are legitimate fears of a 'gentrification' of culture, in which working class people are becoming marginalised and disengaged.
- Young people from poorer social backgrounds are particularly alienated, raising issues for society as a whole.
- The deepest divides are often geographical, with the poorest areas of Europe cut off from cultural content, and the poorest countries making, producing and supporting the lowest number of films.
- Diversity of audiences is essential to the long-term diversity of production.
- The knowledge gap needs to be filled urgently with a commitment to research, shared across borders.
- The geographical divide is a strong starting point for action with greater emphasis on co-production and targeted funding.
- Consultation is essential before embarking on diversity strategies and consideration should be given to decentralising decision-making.

INSTITUTIONALISED ATTITUDES

- Studies suggest that liberal and seemingly progressive film institutions have been weak on self-examination and complacent about hidden discriminatory attitudes.
- The film industry is comprised mainly of small businesses, which are generally focused on survival, rather than the big issues of European diversity.
- Networks are natural in business but can become exclusive and excluding.
- Hidden prejudices can easily take hold in centralised institutions where power resides with a small number of decision-makers.
- Institutional norms and values can feel objective to those inside organisations, when in fact they are deeply subjective.



- Typecasting is a more common form of discrimination than active exclusion.
- Boards of film bodies and institutions are powerful and generally made up of those who have succeeded in an unequal business.
- Quotas take the decision-making power away from institutions to an extent.
- Quotas are routinely used in Europe, particularly to protect local content but are resisted by many when it comes to employment, film support and competitions and awards.
- Quotas come in many forms. They can be simple, neutral allocation of a percentage of funds to a specific group.
- Or they can be more complex, demanding that producers employ a certain number of people from under-represented groups on projects; or that films reach targets for on-screen representation.
- Quotas are sometimes resisted by the would-be beneficiaries, who worry about accusations of 'tokenism'. Such fears might be contrasted with the sense of entitlement of what has been termed a 'confidence elite'.

DATA

- Data is a major weakness for film and has contributed to the diversity problem.
- Film urgently needs to join the knowledge economy, which may require new structures and cross-border cooperation.
- Transparent knowledge is actually becoming scarcer with VOD services reluctant to reveal detailed data.
- The industry discards considerable amounts of potentially valuable data, working from film to film without broader knowledge-sharing strategies.
- The divide between producer and audience in the value chain creates a knowledge gap in content creation.
- The digital age offers new opportunities for a dialogue with the full diversity of audiences, but they are underused, or employed too late in the production process.

EDUCATION

- Education is the quintessential bridge-building strategy.
- Schools constitute the front line in the diversity battle in culture and society as a whole.
- There are divides in provision of film education between privileged and richer schools and those in poorer communities.
- Film education has been a weakness but is growing strongly around Europe.
- For some, the emphasis is exposure to, and appreciation of, European film.
- The bigger opportunity for film diversity may be in digital film-making, which may encourage and nurture new talent from a wider diversity of children.

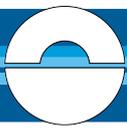
- Media literacy is an essential tool in closing digital divides.
- Film schools have a better record than the wider industry in diversity and most are examining their own equality policies and institutional attitudes.
- The deepest divides seem to emerge between film school and the industry itself.

INDUSTRIAL PROCESSES

- The precarious nature of the business and the weakness of digital models may turn off people from less privileged backgrounds.
- One barrier to creating a more diverse industry is simply the fact that there are less jobs, and particularly jobs with career prospects.
- The film value chain divides producer from audience, which weakens audience diversity.
- Building engagement with audiences at the early stages of a project may be effective but remains outside the industry mainstream.
- New kinds of cross-media content, built in much closer partnership with audiences, are growing again after a faltering start and may encourage more diversity in production and audience.
- Digital technologies have opened up the possibility of a powerful and active grassroots film sector, where talent can be nurtured.
- A strong amateur sector, supported and encouraged by the industry, might become a cauldron for new talent but, more importantly, help build a diverse and participatory film culture with benefits for all.

CONTENT

- The relationship between on-screen representation and diversity requires further research.
- The effect of a century of inequality on European film lacks the deep study that has been applied in other areas, such as literature.
- The relationship between young people and European film is under-examined.
- New measures are now being more widely used to interpret on-screen representation, including the Bechdel Test.
- A globalised market is affecting on-screen representation with a widely-held perception that major markets are resistant to some minority groups.
- More films are being made in the English language, including by European directors, aimed at international markets, with possible implications for language diversity.
- Some changed demographics are influencing increased on-screen diversity. More films are being aimed at older audiences in an ageing global market.
- More films are being made to service specific under-represented groups but there is a shortage of talent in many areas.



AUDIENCES

- The diversity of the audience has a knock-on effect to the diversity of film-making – and in the long run may be key to the survival of the art form.
- Distribution to audiences is a weakness, particularly in areas outside the major cities.
- VOD offers theoretical access to more films on more platforms, but discovery of European film that has not already enjoyed box-office success is difficult.
- The curatorial role of European cinemas remains very important, even if access to screens is limited.
- Digital tools for mobilising audiences are widely available but underused, partly because film production is divided from audience by an elongated value chain.
- Audience development policy is over-reliant on making film available on emerging on-demand channels but European film needs to be focused on how to turn access into engagement.

FOCUS

This report is intended to be provocative and to foster debate, rather than being a definitive guide to every possible approach to diversity.

To help focus the report, it has concentrated on three areas:

- Women in leading creative roles
- Young people
- And social class

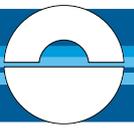
The selection is not meant to suggest that they are more important than any other issues, such as race and ethnicity, sexuality, people with disabilities, etc.

It is hoped that the focus on issues of gender, age, demographics, social inclusion, etc. will raise many of the key questions that need to be addressed for every under-represented group.

The scope of the report should hopefully be applicable to the full diversity of people, although there remain important gaps that should be filled by specialist reports in all areas.

Building Bridges has identified and classified initiatives in a range of areas. The next two pages offer a list of key areas of action.

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1. INTRODUCTION

- The European industry, in contrast to the US, is generally united about the need for diversity and the issue has climbed the industry and political agenda.
- There is momentum behind short-term steps to make the industry fairer, but a broader view that includes audience diversity poses bigger challenges.
- Strategies need to begin with identifying root causes and creating clear and measurable objectives.
- Removing barriers to entry will not necessarily resolve diversity issues. The industry needs to build bridges to under-represented groups.

IN BRIEF

The diversity debate in European film is remarkably consensual. Despite alarming evidence of inequalities, there has been little of the acrimony and anger that characterises similar debates in the rest of society.

In the US, diversity is at the centre of the so-called Culture Wars¹, dividing conservative and liberal thinking. The American Civil Liberties Union (ACLU) has called for a federal investigation into male-dominated hiring practices in Hollywood.²

In Europe, no one is calling for heads to roll, or for a root-and-branch review of practices and funding.

That reflects the fact that the European film industry is overwhelmingly liberal, where open discrimination is extremely rare. Reports demonstrating equality gaps have been more the source of surprise and embarrassment than anger.

Some research even suggests that unquestioning belief in the progressive and open-minded outlook of the industry might have actually contributed to the failure to recognise the problem. (See p. 23)

An injection of urgency into the debate does at least suggest that film has made big steps in the right direction.

The catalyst for the diversity debate was gender equality, suggestion that some women have at least acquired the kind of influence and profile that makes them impossible to ignore.

That progress should not be overstated.

Women are not a special interest group to be accommodated: they are the majority of the population in every single European country.

And unlike Hollywood, European film is not solely reliant on an unfair market system, but is supported by public funds in the name of 'cultural diversity.'

At least there is now clear momentum behind the idea that action is needed to create a fairer film industry,

And the European film industry can be a formidable force when it unites behind shared ideas.

Film faced one of its biggest diversity challenges less than a decade ago, when it was widely predicted that large numbers of independent cinemas would have to close because they could not afford to convert to digital **D-Cinema** projection.

Across Europe different national industries found a variety of ways to fund the switch, normally constructed on the inelegant but effective Virtual Print Fee mechanism, in which costs were shared between distributors and exhibitors.

The industry has also been an active lobby in favour of '**cultural diversity**' (see Chapter 4), playing an influential role in ensuring that film has been excluded from the free-market terms of trade deals with the US.

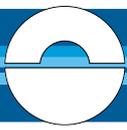
That victory has helped create a **production boom**, supported, or underwritten by public funds. In 2005, the European Audiovisual Observatory counted 920 number of feature films produced in the EU.³ A decade later, it was 1,603.

An essential point to make is that, in terms of nationality, European film has made big strides forward. **Co-production** is one of the most impressive tools for ensuring that all EU nations, to a greater or lesser extent, are participating in, and contributing to, the film industry. (See p. 18)

Perhaps it is not surprising then that there has been an assumption that answers can be found within the industry and without any fundamental change in policy or business practice.

In most industry discussion, the interests of film and those of the film industry are assumed to be one and the same.

But there are dangers in what political analysts call 'triangulation'⁴ – opting for positions that represent the acceptable centre of all the different interests and opinions inside industry.



1. INTRODUCTION

QUESTIONING THE CONSENSUS

The desire for change without really changing is natural, particularly in a climate of economic pressure and digital change.

But the diversity debate in film and the arts more generally sometimes looks suspiciously like an elite club discussing the least disruptive way to let in a few more acceptable members.

That might not matter in a different political and economic climate but the appetite for cultural investment has been diminishing in much of Europe with many governments slashing budgets.

A good case could be made that increased production spending is sound economic and social investment, restoring some of the cultural cohesion in Europe that has been threatened or lost during a period of austerity and tensions around immigration.

But the political and financial will is not present in most countries.

Instead of new investment, there has been a shift in the European debate from production towards audiences, with EU, regional and national schemes pushing financial support towards the demand-side, rather than the supply-side.

It has been a necessary correction. In some markets, there has been an over-supply of content, at least in terms of theatrical capacity. (It is essential to emphasise that many smaller and relatively poorer countries in Europe remain under-supplied).

Nonetheless, close to 70% of public funding goes to production and 10% to distribution.

It has inevitably broadened the diversity debate to audiences. A fairer share of chances behind the camera would make the industry more equal – but if no one sees the films, then it does little to increase the diversity of the art form.

Given that cinema admissions have barely shifted and that DVD has sunk into a slow but terminal decline, the focus has moved towards the digital market, and particularly Video On Demand (VOD).

Europe now has more than 3,000 VOD services. The Creative Europe programme has been supporting platform development and new release patterns that might widen the access to content through VOD.

But many in Europe fear that globalised VOD giants, including Netflix, Apple and Amazon will come to dominate the market.

For the industry, the most controversial ideas have come from the European Commission, which has offered proposals for a **Digital Single**

Market, in which content will be available simultaneously to all EU citizens, on any platform, regardless of boundaries. (See p.55)

The free movement of content is intended to increase audience diversity but it illustrates the potential conflict – between audience-centred measures and those from the industry.

Consumers may want instant gratification but industry cannot supply it without ripping up its own business model.

DIVERSITY STRATEGY

Any meaningful strategy to support diversity in film must have two critical factors in place: clarity of purpose and measurability of outcomes.

The next chapter will demonstrate that there are many challenging facets to diversity policy: the most contradictory policies and actions can be, and are, justified in the name of diversity.

Every diversity policy and strategy, conservative or radical, needs transparent goals but with so many complex issues at stake – particularly when trying to address production and consumption – it is difficult to know where to start.

This report suggests that the first step is to identify the root causes of the inequalities that have infected the industry. It is difficult to put something right, if you do not know why it has gone wrong.

Categorising those causes is not a precise science but it is a necessary exercise. The following are some suggested areas of concern:

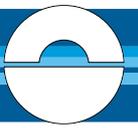
Individual and institutional attitudes

Film remains among the most liberal of all the arts, and so revelations of deep inequalities have been a source of embarrassment.

They should perhaps also have come as a severe knock to the confidence of the industry, and opened up serious questions about how far its practices, processes and norms are, consciously or unconsciously, discriminatory.

There is little sign of that thorough self-examination for a number of reasons, beginning with the fact that the European industry is largely comprised of specialised small companies understandably focused on day-to-day business.

There has also been a reticence to focus too much on the debate in public, given the competitive and political nature of public funding. For some the debate is overblown anyway because they see nothing fundamentally wrong. (Chapter 5)



1. INTRODUCTION

There may even be an element of self-preservation: It is clear that for under-represented groups to take their place at the top table, some of incumbents from the dominant group will need to make way.

Such nobility is not common. People are generally in favour of a greater diversity of people taking jobs in film ... just not theirs. There are echoes of the words of St Augustine of Hippo: "Give me chastity, just not now".⁶

But the reality is that film has been heavily dominated by a relatively narrow social group and that must have an effect on institutional attitudes.

Those attitudes may simply reflect the rest of the world but film and the film industry are also part of the superstructure of society that reinforces and, to an extent, legitimises the social status of different groups.

A diversity debate should logically include a root and branch analysis of institutional attitudes.

Natural causes

There are historical factors that have naturally prevented film from becoming a truly democratic medium, notably the high cost of production and distribution, and the requirement for rare specialist skills.

The digital age has dramatically changed the landscape, expanding access to the means to shoot and distribute audiovisual content, if not to make money from it.

Making great films will always require considerable skill and there will always be some form of hierarchy.

But that does not mean that supposedly 'natural' divides in such areas as 'talent' and 'art' should not be vigorously challenged. Ingrained, institutional attitudes, masquerading as objective judgments can be excluding.

The quality threshold in film outside pure market forces is largely selected by the industry itself, using such self-defined ideas as 'auteur theory'.⁷

Challenging elitism can easily slip into an argument for aesthetic relativism⁸ – but there should always be room for scrutiny and review.

Market forces

The usual suspects in the debate about inequality in film are the market and the influence of Hollywood. The assumption has strong foundations: a conservative industry, particularly but not exclusively in the US, has tended to see women directors as a greater commercial

risk and BAME directors as valuable only in servicing their own ethnic groups.

That assumption may originally have been based on a large dose of prejudice but it has been sustained to an extent by changed studio economics, relying on the success of a few franchise blockbusters, made for hundreds of millions of dollars.

In today's risk-averse business, greater value is put on experience and a 'safe pair of hands' – and the experience resides with the incumbent dominant white male group.

Market forces can only be one factor for a European industry where public funding has such an essential influence. But it is certainly not immune to those same conservative market instincts, particularly when aiming at the international market.

Successful European films are often based on remakes, sequels and adaptations (See p. 49), and there are signs of increasing use of the English language.

The, real or imagined, perception of what audiences want still plays a major role in deciding who gets to make or watch a film.

A far-reaching diversity policy needs to be based, not simply on how to service demand, but how to **build demand**.

Education, skills and training

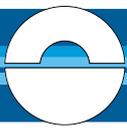
The long-term diversity issue depends on building an active film culture among young people, and on creating a pipeline of creative talent and skills.

Education is now widely recognised in Europe, by industry and policy-makers, as an essential investment. The nature of that education, however, is more complex, trying to find a balance between film and media literacy, European film appreciation and practical film-making.

Business models and processes

There are factors in the way that films are made and distributed that create diversity issues, and there are new forces that are undermining progress.

The fragmentation of audiences; a big increase in competition for leisure time; and the breakdown of old specialist career structures have made independent film-making for new entrants more precarious than ever. For those from poorer backgrounds, film may seem like an unrealistic career option, leaving the industry dominated by the more privileged. The industrial process may need to be examined if there is to be real diversity.



1. INTRODUCTION

The digital era was meant to become the great leveller in film production, opening up the industry to new voices and reaching out to a vast store of potential consumers online. In practice, the digital era has, thus far, actually accentuated some existing inequalities. (Chapter 8)

Audiences

The audience has long been the missing link for film. It is not just the fact that audiences are generally treated as passive consumers but that the film value chain creates a big separation between the creative and production process and the final audience (See the author's previous report for CineRegio, Audience In The Mind.)⁹

A sense of alienation from independent film, particularly non-national European film, among key demographic groups is clearly an issue for diversity. (Chapter 10)

A second important issue is changing audience expectation of what, when and how they can access and engage with content. Removing those barriers is becoming more technically feasible but there are huge challenges to the economics, and by extension the diversity of film. (Chapter 9)

Content

If audiences do not recognise themselves and their lives in independent production, they may be less inclined to engage.

And if audiences do not see European film as a key part of their culture, they are unlikely to see it as a career option or as the chosen means to express their ideas.

There are many ways of taking on the content issue, including on-screen quotas, although they may themselves raise further diversity issues. (See p. 34)

One serious issue is how far film should, or is able to, embrace new formats that are more in tune with the way that consumers engage with content across media.

REMOVING BARRIERS

Having identified the potential obstacles to diversity, the first step is to create strategies for eliminating them.

Most changes in policy and practice in the name of diversity are explicitly aimed at removing the barriers that prevent under-represented groups finding roles in industry, and at creating greater access to content for audiences.

Barrier removal is, of course, an essential precursor to effective diversity models.

Some of that work has already been done in Europe outside the film industry, through anti-discrimination laws and education.

The original Treaty of Rome¹⁰ that created the European Economic Community (1957) contained a clause prohibiting sex discrimination in the workplace, which was amended and extended significantly in 2000 through the Employment Equality Directive and the Racial Equality Directive; the 1997 Treaty of Amsterdam¹¹ strengthened the legal framework of human rights and non-discrimination in EU States; the EU Charter of Fundamental Rights (2000)¹² also significantly increased the commitment to equal human rights.

Beyond the EU, the European Social Charter (1996)¹³ and various Articles and Protocols added to the European Convention on Human Rights (1950)¹⁴ have been important in supporting equality.

Most discrimination today is not only illegal but also socially unacceptable in most parts of Europe.

Within the industry, most film businesses, institutions and policy-making bodies actively promote themselves as equal opportunity employers. Film funds and training schemes are assiduous in encouraging applications from the full diversity of applicants.

And yet film still has a diversity issue.

The barriers are often unclear or hidden, and a useful and important exercise is to go through each of the root causes of under-representation to try to identify potential obstacles.

In some cases, solutions are not in the gift of the industry and represent a wider social and political problem. But this report suggests that there are obstacles that are not adequately understood because of the weakness of research and data – and that can be managed.

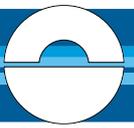
Removing barriers from the supply side of the film industry can be challenging and requires uncomfortable self-examination.

The bigger problems come from the demand-side. What look like obstacles to audience diversity may in fact be the pillars propping up the European film business model.

The European Commission announced plans for a Digital Single Market in 2015 (See p. 55), which included proposals to prevent activities, such as geo-blocking, that prevent access to all European content anywhere in Europe.

Geo-blocking is an artificial means to replicate national boundaries that simply do not exist online. They are barriers, designed by industry, to support the territorial system of rights of the analogue age.

Without them, though, the European film industry would be decimated, if not devastated. And the biggest casualty would almost certainly



1. INTRODUCTION

be the diversity of films, with many independent producers going to the wall.

There is a deeper question though: Does removing territorial barriers and release windows actually increase the diversity of audiences?

It cannot be disputed that new release models offer theoretical access to anyone but in practice, there are other barriers to viewing, chiefly a lack of demand, or the means to generate demand.

The difficulty of barrier removal is that it is essentially conservative. It does not, in itself, directly change the institutions or the industrial structures (though, as with the single media market proposals, it may be highly disruptive).

It does not address the underlying core issues, in particular, the lack of interest in either making, or watching films among large sections of the community.

Barrier removal does not create demand. For that, it is necessary to build bridges.

BUILDING BRIDGES

Bridge building strategies are those that actively encourage or incentivise under-represented groups in society to engage with film, in terms of employment and participation, or as audiences.

Bridge building can be time-consuming, expensive and disruptive and it is fair to ask how far the film industry's responsibilities stretch.

Creating an industry that is theoretically open to all is accepted by most as a duty. But if people choose not to take those opportunities, can it really be the fault of film, particularly when the underlying issues go so far beyond film.

Nicholas Hynter, director of the National Theatre, made the point, in response to the criticism of the way that the arts has become so dominated by the wealthy, privileged and elite educated:

"The problem is a much wider social problem. We have been brought to a place where, whatever you want to do, if you've been privately educated you are going to find it easier to do it."¹⁵

The UK has specific issues, including recently introduced fees for university students and massive over-representation in the arts of the 6.5% of people who went to fee-paying schools.

But the same issues of ingrained elitism exist in different forms elsewhere in Europe, and are accentuated in some places by the lack of opportunities and high unemployment of those outside that elite.

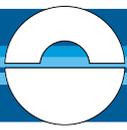
Nonetheless, film needs to build those bridges for a variety of reasons:

1. Film needs a diverse talent base to sustain and advance the art form and industry.
2. A narrowing social demographic cannot support and sustain a diverse industry in the long run.
3. Public funders will eventually question the value of investing in a film industry with narrow reach.
4. Because it's the right thing to do ...

Again, a valuable exercise would be to take each of the root causes of under-representation and decide where barrier removal has limitations and bridge building is necessary.

As this report will show, bridge building covers a wide range of activities and actions: Quotas, education, demand-creation, co-production, data sharing, audience development strategies, cinema and festival outreach, pricing, new kinds of content ...

What becomes clear in evaluating diversity actions is that **barrier removal** is about survival for the film industry, but **bridge building** is what will allow it to seize the enormous potential opportunities of the emerging on-demand, audience-centred digital economy.



2. UNDER-REPRESENTED AND EXCLUDED

IN BRIEF

- Under-represented groups are often seen as homogenous but are actually very diverse, and sub-divided by age and class.
- Gender issues are unique in the diversity debate because women represent the majority in all EU countries and the number of qualified people is high.
- Social class is a hidden issue, even within the diversity discussion in film and there are signs that inequalities are growing and engagement falling.
- Geography is often a critical factor in determining engagement with film. and is an essential component of diversity strategy.

Inequalities in film follow the same pattern of slow progress that can be observed elsewhere in society.

Europe is ahead of the global average, with women making up more than 30% of MPs in 11 countries; but the number is below 25% in another 11 countries with Hungary at the bottom with just 10.1%.¹⁶

In the business world in 2014, women made up just 18.6% of the boards of large listed European companies¹⁷ but again that is up on the 11.9% in 2010.

Progress though generally comes with caveats.

While the number of female government ministers has increased, there is still stereotyping. 40% of appointments have been to supposedly 'softer' briefs, including: social affairs (10%); families and children (7.5%); and gender equality (6.5%). Just 2% of women had roles covering finance and budget, or economic development, and that fell to just 1.5% for defence.

At least there are strong voices arguing the case for gender equality. (It would be instructive to see the impact of generous paternity and maternity leave rules on diversity, led again by Scandinavian countries.)

In other areas of society, however, there are more worrying signs that progress is slowing and even slipping into reverse.

Close to half (49.7%) of Greeks under the age of 25 are out of work, as are 49.3% of Spaniards, and 43.6% of Croatians.¹⁸

Since the 1990s, there had been a long period of steady closing of income inequality in many countries but commentators have noted that it was based on market growth, which came to a halt with the economic crash of 2008 and 2009.

Social exclusion is a serious issue in much of Europe today, creating dangerous cultural fissures.

The institutions that historically supported the interests of workers have declined, including socialist parties and trade unions. Even in a traditional stronghold like France, union membership has fallen to 8.1% of the working population.¹⁹

In the UK (and reflected elsewhere in Europe), members of parliament (MP) from working class backgrounds made up 20% of all MPs and 37% of those in the ruling Labour Party in 1964; by 2010, the number had dropped to 5% of all MPs and just 10% of Labour representatives.²⁰

The diversity issues in film then have the same basic roots as those exhibited everywhere else in society.

But there is an argument that film and other cultural forms have greater responsibility to remedy inequalities in content creation and audience participation because they have the power to shape attitudes, as well as reflect them.

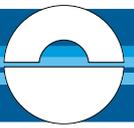
WOMEN IN FILM

The catalyst for the debate on diversity has been the under-representation of women in key creative roles in film.

Film is not alone: there has been a long established domination by men in most of the arts. Just 3% of the 2013-14 performances in leading theatre and opera companies in France were directed by women.²¹ Even digital native forms, such as videogames exhibit the serious gender imbalances.²²

The discussion has moved up the priority list because women are better represented in film, and particularly in policy and commissioning roles around Europe but the figures from a succession of recent studies, demonstrate a number of trends:

- **The Celluloid Ceiling²³:** Women may be more numerous in the industry but are grossly under-represented in the key creative roles in film, notably screenwriter and director. Only 16.3% of European films were directed by women between 2003 and 2012²⁴ Women made up just 7% of the directors of the top grossing 250 films in the US in 2014.²⁵
- **The Sexual Division Of Labour²⁶:** Women are routinely typecast in many industries, with the implication that they are best suited for particular roles and unsuited for others. Research shows that female-dominated jobs are paid substantially less



2. UNDER-REPRESENTED AND EXCLUDED

than those in which men are at the forefront.²⁷ New findings by the EAO showed that female directors accounted for 16.1% of the 9,349 European films released in Europe from 2003 to 2012, which in turn accounted for 8.7% of the box office in that period.

- **The Glass Cliff²⁸:** Research shows that when women are given opportunities to take charge of businesses, it is generally in high-risk situations, and research suggests they are fired more quickly than male counterparts. In other words, individual women are given impossible tasks and when they do not work miracles, conclusions are drawn about the abilities of their gender. One of the dangers of quotas is that the women are just offered more of the riskier projects.
- **The Second Shift²⁹:** Women are still overwhelmingly expected to take the lion's share of the childcare and household tasks. Poor access to on-the-job childcare and ruthless treatment of those choosing to take career breaks takes a toll. The common assertion that women do not get creative roles because they do not fit work-life balance deserves greater study. Is it the processes and culture of film that needs changing?

And all the time, European women are taking home an average of 16% less than their male counterparts for the same work.³⁰ The situation is not evenly distributed in Europe with some countries, such as those in Scandinavia, much more equal, and most countries making progress in closing the gap.

The gender gap has become an issue but there is a crucial difference to the under-representation of other social groups: women are the majority of the population in all EU countries.

What's more, the evidence suggests, the issue is not qualifications: OECD research in 2012³¹ showed that women accounted for the majority of arts and humanities degrees in every country researched, with the highest numbers in European countries. In the EU in 2010, 60% of all graduates were women.

And yet a report³² carried out by the Laboratoire de l'Égalité, in partnership with media giant Vivendi, offers damning research into widespread under-representation in all the cultural sectors.

It concludes that there is a need for serious and **far-reaching review** of the role of women in film and the arts more generally, including data gathering, education, greater exposure for the work of women, and some "proactive appointment." (See Chapter Six for more on quotas)

BAME AND MINORITIES

As with women in film, under-representation in front and behind the camera is the legacy of historical prejudice and discrimination, which

is now considered socially unacceptable in most countries and is governed by law.

But there are still hangovers in the form of stereotyping, which are all the more pernicious for being largely unconscious.

Much of the diversity problem for minorities stems from perceptions of the market. There is a belief that films featuring minorities, in terms of race, sexuality or disability will not appeal to the mainstream.

A study from Indiana University in 2011³³, for example, suggested that there is a wide industry perception that if there a strong BAME roles in a film "then whites don't see themselves as part of the intended audience."³⁴

"I think that's in large part because of the way that films are marketed these days," says the report author Andrew J. Weaver. "You have this whitewashing of the mainstream films, and the only time that you see minority casts are for films that are marketed very specifically toward minority audiences."

There is an element of self-censorship, based on beliefs about the market that may not match the realities of demand today.

On the other hand, there is evidence that some prejudices are particularly persistent. For example, the Indiana research revealed resistance from white audiences to romantic comedies with strong minority casts. Other studies have suggested an in-built "racial empathy gap."

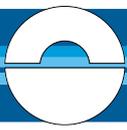
Disturbing research from University of Milano-Bicocca³⁵, for example, found that "Caucasian observers reacted to pain suffered by African people significantly less than to pain of Caucasian people. The reduced reaction to the pain of African individuals was also correlated with the observers' individual implicit race bias."

Other studies come to similar conclusions but the history of progress suggests that even deep-seated prejudices can change. If that is not a key target for public cultural funding, then it is difficult to see what it is for.

European film has unquestionably played a part in challenging prejudice – it is one of the defining characteristics of arthouse film.

BAME issues have been a more insistent issue on the European agenda over the last decade, because of the diverse mix of cultures in the major cities of Europe; the political attention on integration, particularly in the light of Islamist terrorism and the huge increase in EU migration; and also because of the emergence of great film-makers.

The narrow demographics of the audience, however, limit the wider social impact.



2. UNDER-REPRESENTED AND EXCLUDED

And in the current environment in Europe, even in the non-commercial sector, businesses may feel that they are not in a position to take risks on funding films with minority leads, other than films where race and sexuality are 'issues.' That view is particularly persistent in films aimed at the international market.

Again there is a knock-on effect. Minority communities who do not see themselves on-screen in recognisable roles may simply see themselves as not having any part of a European film tradition.

In the UK, people from BAME backgrounds made up just 5.3% of the workforce in production, 3.4% in distribution and 4.5% in exhibition in 2012.³⁶ (By contrast, they represent 12% of the total UK workforce, and more than 40% of the total population of London.)³⁷

Film companies and institutions, and the film culture can be, in the memorable phrase used by Greg Dyke, the former Director-General of the BBC, who called the corporation "hideously white."³⁸ (Dyke went on to become chair the British Film Institute.)

But it is important not to define the challenge too narrowly.

Each minority group faces specific forms of discrimination, which normally acquire their own label: racism, homophobia, etc. (People with disabilities remain so neglected on-screen that there is not even an ism word for the very real stereotyping and discrimination many face.)

Such prejudices need to be challenged, of course, but it is also important to recognise that there are other social forces at play.

The most important issue of social exclusion may not be the race or sexuality of an individual but his or her social class.

The danger of a tick-box culture is that quotas can be filled by affluent and elite-educated people, who happen to be members of minorities, without addressing the much broader issues of social exclusion.

AGE (OLDER)

Age is an issue at both ends of the spectrum.

Older people in the film industry and on screen have been subject of a great deal of stereotyping, often typecast as victims or villains. And there has been a particular issue for older female actors in finding interesting and challenging parts.

European film does not have the same corrosive worship of youth and beauty as Hollywood, where any hint of mortality, particularly among women can be career suicide. (*Sunset Boulevard* explored the issue 65 years ago, but a more contemporary take is offered by comedian Amy Schumer's Last Fuckable Day sketch).³⁹

That does not mean Europe is immune from ageism but it is possible to explore ageing with maturity in European arthouse film, with Michael Haneke's *Amour*⁴⁰ among the greatest works.

There are sound market reasons too why ageism is less of a diversity issue than it was for previous generations: the audience for European film, and particularly European arthouse and non-national film, is ageing. The UK's Film Distributors Association (FDA) noted that in 2014, the over-45s had overtaken the traditionally dominant 15-24 demographic in cinema-going for the first time.⁴¹

Ageing arthouses reflect ageing populations in general. In 1970, the average age of a German was 34-years-old; by 2010, it was 44.2, and that is predicted to rise to 47.8 by 2020. In almost 50% of all EU countries, the average age is already more than 40-years-old, and that is forecast to be true of 84% by 2020.⁴²

Eight European nations (Germany, Italy, Netherlands, France, Sweden, Portugal, Slovenia and Croatia) are predicted to become 'super age-aged' nations by 2020, with one-in-five of the population over-65.⁴³

The penny has dropped even in Hollywood. Films, such as *The Last Marigold Hotel* and its 2015 sequel, consciously target an older demographic and have been making an impact at the box office. Even action films have got in on the act, with *The Expendables* franchise, for example, bringing back some of the ageing but still bankable male action stars for an unexpected hurrah.

AGE (YOUNGER)

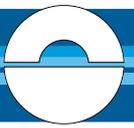
The belated recognition that people can still function over the age of 55 has a knock-on effect at the other end of the age spectrum.

There is a popular expression 'dead man's shoes', which refers to the way that young people traditionally moved up the career ladder when incumbents from the previous generation retired or died.

Today, men and women are still happily dancing the *fandango* in their comfy footwear until ripe old ages.

Perhaps it is a sign of healthier 21st century lifestyles and the ageing population that members of the old guard still frequently think of themselves as *enfants terribles*.

It is instructive to see one-time icons of youth culture, who railed against their parents' conservatism, such as Bob Dylan (*The Times They Are A Changin'*) and The Who (*My Generation*) still going strong. Older artists may have in their youth have genuinely felt "I hope I die before I get old" but in a generally healthier and prosperous Europe today, many feel "forever young."



2. UNDER-REPRESENTED AND EXCLUDED

It is perhaps understandable then that the current generation in power are in no hurry to step aside. Or to put it in the words of US humourist Ogden Nash, in a 1959 poem: "Progress May Have Been All Right Once, But It Went On Too Long."⁴⁴

It is not surprising to hear rumblings from younger people that a selfish generation was not giving way to the next or leaving much of a legacy; the surprise is that the cries are not louder.

What it means in practice is that up-and-coming younger talent cannot find a way to break into the industry.

The worry for industry is that the roots of film are not refreshed and that younger people simply find other ways to express their ideas.

For many, the problem actually begins with a lack of content to which youngsters can relate – which is why organisations, such as Kids Regio have been actively supporting the making of **films targeted at children and teenagers**. (See p. 48)

Production of films, and particularly live action films, aimed at children (broadly under-12s) remains a relative weak spot in Europe, even though they account for an estimated one-in-10 of all tickets sold for EU films.⁴⁵

Industry and policy-makers have also been trying to build up film education initiatives. (See Chapter 7)

One area of particular significance is the fragmentation and marginalisation of television audiences for European film.

Older generations often found their way into film through screenings on terrestrial, and particularly public-service television channels.

Increasingly though, European, and particularly non-national European film has been relegated to specialist channels, or late-night slots in the schedules. The exception is often English language film, which has its own implications for diversity. (See p. 49)

Older cinephiles were often introduced to film because there was little alternative choice of entertainment. The vast increase in content now available online makes this the greatest time in history for those generations initiated into the European film tradition.

But it is becoming harder than ever to reach the uninitiated, particularly children from working class homes, without access to a cinema, and possibly without encouragement from parents, teachers, siblings or peers.

The diversity issues in terms of age have a close correlation to social class (see below).

Children and youth are recognised as an essential diversity issue in that they clearly represent potential future audiences; hence, the investment in education initiatives around Europe. (See Chapter 7),

Yet those efforts too often underestimate the scale of either the challenges, or opportunities. The question ought not to be how can we try to involve young people in our work, but how we can become an essential part of theirs.

SOCIAL CLASS

The ability of the visual language of cinema to convey complex ideas to the mass market was once considered the defining characteristic of film.

The growth of film from novelty sideshow to the greatest art form of the 20th century was largely driven by that ability to reach the full diversity of audiences, whether the motives were political, or commercial.

One of the iconic images for film history is the *agit prop* train⁴⁶ carrying the films of Vertov and Eisenstein to the citizens of the new Soviet Union. The work of fascist and Nazi film-makers also understood the power of film to influence social behaviour.

And yet, European film seems to be drifting further away from communities outside affluent areas of big cities, with a small number of local commercial hits often acting as exceptions that prove the rule.

The roots of film, in a mass culture are being allowed to wither.

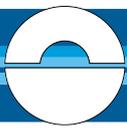
It is important not to become too romantic in the view of people's cinema. While the *nouvelle vague* wanted to associate their work with Hollywood popular film-makers, such as John Ford and Howard Hawks, the work they helped inspire has struggled to connect with the masses.

It is nothing new. Historian Eric Hobsbawm noted that the market for the 19th Century socialist William Morris's Arts And Crafts designs – intended to raise the consciousness of workers – ended up being confined to the "culturally adventurous bourgeoisie and the professional middle classes."⁴⁷

There was, nonetheless, a commitment and deep desire to be able to cross the narrow bridge between classes. Now, there are legitimate fears that the bridge is being burned.

The reasons, again, are rooted in social trends that have nothing to do with film itself. A working class, conscious of its culture and political power, has been slipping for many years.

In many European countries, the collapse of heavy industry led to a decline in the power of what was then clearly understood as a 'working



2. UNDER-REPRESENTED AND EXCLUDED

class' or 'proletariat,' and there are growing concerns about the effect of social exclusion and alienation, particularly among the young.

In the UK, a study⁴⁸ suggested that 44% of people in film, music and television were educated at private schools, which are attended by 7% of all children. That is the same percentage as for the top 1,000 wealthiest people in the country and higher than the percentage for Cabinet ministers.

In the post-industrial economy, economic power has become even more concentrated in the hands of the rich in most of Europe.

Shorn of power, there has been a strong sense that the white working classes of Europe have been neglected. That is certainly the rhetoric of many of the nationalist parties that have made serious political inroads in many countries.

Class is critical to understanding the other excluded demographic groups in this report.

REDIRECTING THE PIPELINE

The biggest obstacle to diversity, faced by many public bodies, is the pipeline of talent from target groups.

The lack of interest from people from under-represented groups in entering the business is in many ways more disturbing than the lack of opportunities within the business, where resolutions are at least in the hands of industry.

Recruitment issues though raise questions about the relevance of film to different under-represented communities. Under-representation on-screen, in front and behind camera may have a knock-on effect that deters people from even thinking about careers in European film.

There are more controversial theories that suggest that the lack of connection with the arts and society among disadvantage groups is a symptom of acquired attitudes and self-perpetuating norms.

The idea that poorer people can be trapped in a 'culture of poverty' from which they have neither the drive nor the intelligence to escape, has been strongly disputed.⁴⁹

The theory suggests there are classes of people, for whom cultural engagement will always be anathema.

Such views are not widely held among liberals but social class is still an area where the industry's educated, upmarket bias can show itself. Campaigners for improved film education for example are often anxious that cinema is not taught as one of the elite arts.

The pursuit of excellence can be a noble goal but one of the themes of this report is that the arbiters of quality should be subjected to scrutiny.

Transparent data would be useful in understanding the pipeline issues in every respect.

It would be instructive, for example, if all public funders could help assess the state of the pipeline by publishing **full demographic detail** about applicants for positions and financial support.

Such work might help look at which under-represented groups are least likely to seek support for projects, or jobs – which will then allow an informed debate about why groups do not apply.

GEOGRAPHY

Where one lives is often the biggest determining factor in how far one engages with culture.

Sometimes exclusion is simply a matter of geographic realities: there are remote parts of countries with no access to cinema and arts and with poor broadband connectivity.

These are not necessarily economically deprived areas. Sometimes people choose to move to remote areas as a means of escaping the pace of city life, and sometimes as a way of avoiding social diversity itself.

But often the geographical divide goes along with other issues, including lower quality education, poorer wages, fewer social facilities and poor access to transport.

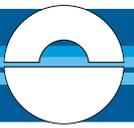
Bridging such gaps has been a core aim of the European Union, which has targeted imbalances in wealth, economic infrastructure and opportunities through measures, such as European Regional Development Funds (ERDF)⁵⁰ and the European Social Fund (ESF)⁵¹, established back in 1957.

But there has been very little mention of geography in the diversity debate in film so far, which may be a symptom of the domination of the debate by institutions based in capital cities.

Decisions have been taken in many countries by the leaders of institutions based in the very richest parts of countries without the remotest sense of what effect they might have on poorer and more remote areas.

Again, there is a strong case that **consultation** and **decentralisation** should be at the heart of diversity strategy.

In fact, following the law of unintended consequences, some of the poorest regions might actually be further disadvantaged by some proposals intended to support diversity.



2. UNDER-REPRESENTED AND EXCLUDED

For example, quota systems that reward involvement from people from ethnic minorities, and penalise those projects that do not, are almost certain to become a problem for poorer regions.

Immigrants, understandably, do not choose to move to poor areas of countries. In fact, such quotas may act as yet another incentive for producers and other businesses to move to cities, where there are larger pools of diverse talent.

Diversity policy may encourage the already existing trend for talent to be sucked into the centre. Given that, overwhelmingly, decisions on film policy are taken in capital cities or major population centres, it is easy for the most culturally deprived to be out of sight and out of mind.

That problem may be best handled by making sure that policy is, where possible, **devolved** to regions and other local cultural bodies; or at the very least, there is the deepest consultation with regions over diversity policy. The issue of geography is extremely important to the discussion of diversity in terms of class and age. In both cases, diversity policy becomes confused.

EUROPE

At an international level, the same issue of geographic imbalance also hold true.

OECD research suggests that the countries in the bottom 10% in terms of disposable income are disproportionately based in Eastern Europe, with the richest in the founding EU countries and the Nordic region.⁵²

Migration within Europe is overwhelmingly from the East and South to the West and North, which in itself has implications for diversity.

There is strong evidence of a 'brain drain' or 'human capital flight' taking talent away from emerging EU economies.⁵³

The poorest countries in the EU in terms of GDP *per capita* are closely linked with the number of films produced (and co-produced).

Seven countries: Bulgaria, Latvia, Poland, Portugal, Romania, Slovakia, Hungary and Greece bottom 10 in terms of the EU per capita GDP in 2014 and the bottom 10 in terms of films produced.⁵⁴

The five countries with the biggest populations (Germany, UK, France, Italy, Spain) represent 18% of the total number of countries but 62.5% of the total EU population and 72% of the 100% national co-productions.⁵⁵

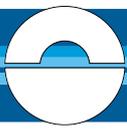
COUNTRY (Population)	PRODUCTIONS per million capita (Number of films)
Estonia (1.3m)	15.1 (20)
Denmark (5.7m)	11.2 (64)
Finland (5.5m)	7.8 (43)
Ireland (4.6m)	7.4 (34)
Belgium (11m)	6.4 (70)
Slovenia (2.1m)	6.2 (13)
Sweden (9.8m)	6.2 (61)
Croatia (4.2m)	5.7 (24)
Lithuania (2.9m)	5.5 (16)
Austria (8.6m)	5.4 (46)
Spain (46.4m)	5.0 (230)
Netherlands (17m)	4.6 (78)
Czech Republic (10.5m)	4.5 (47)
France (64m)	4.1 (260)
Latvia (2m)	4.0 (8)
United Kingdom (64m)	3.7 (239)
Greece (10.8m)	3.7 (40)
Hungary (9.8m)	3.2 (32)
Germany (81m)	2.9 (236)
Italy (61m)	2.9 (177)
Slovakia (5.4m)	2.4 (13)
Bulgaria (7.2m)	2.1 (15)
Romania (20m)	1.9 (37)
Poland (38.5m)	1.6 (13)
Portugal (10.4m)	1.6 (13)

The geographical dimension to diversity is often underplayed but it is among the most crucial to resolve in Europe.

A combination of low production numbers, relatively high ticket prices and very low access to independent cinemas means that market share for national and European film is very low in poorer countries – 3.7% in Hungary, 3.5% in Bulgaria and 2.2% in Romania, for example.⁵⁶

The big hope was that digital technologies would close the "digital divide" that separated the different nations of Europe, and there has been progress.

The commitment of the EU, national and regional government, alongside the telecoms and tech companies, to build a broadband and mobile infrastructure has been largely successful. Each of those measures fits the definition of barrier removal.



2. UNDER-REPRESENTED AND EXCLUDED

It is now considerably easier in theory to access the full diversity of filmed content across Europe, through online services.

The European Commission's Digital Single Market proposals suggest that the key issue is territoriality, in which distribution is based on rights sales to individual countries. (See p. 55)

The real problem, however, is demand.

Distribution has to deal with commercial realities and the estimation of market potential of European films is dependent on the possibility of returns.

The calculation is strongly influenced by estimates of the potential audience by exhibitors, which are generally concentrated in relatively affluent areas of major cities in richer countries.

European policy-makers have put more focus on the (re-)emerging countries of the so-called New Europe but creating a level playing field is a long, hard road, not helped by high levels of migration of educated people to richer EU countries.

Bulgarian cinema attendances have been rising year on year, partly supported by European initiatives since it became a full member of the EU in 2007. The state has increased production subsidies by 500% since a low of 2002, while the number of cinema screens has been growing strongly, reaching 196 in 2014.⁵⁷

But today's cinema business is a fraction of the peak. There were more than 3,000 cinemas in Bulgaria in 1989.⁵⁸

Denmark has only three-quarters of the population of Bulgaria but more than twice as many screens. (The situation in Romania is even more acute. It has twice the population of Sweden but less than 40% of the screen numbers.)

In the absence of a strong market for European films and efficient distribution, Hollywood has been extremely dominant. And without a viable cinema or VOD infrastructure, piracy has taken a firm hold.

Despite acknowledged improvements, Bulgaria, Romania and Greece have all been named on the 2015 US Trade Representative 'watch list' for global Intellectual Property theft.⁵⁹

Piracy is another area, where audience diversity comes at the expense of industry sustainability, and by extension cultural diversity. Illegal downloading is an easy way to avoid the price and availability issues of cinema. The evolution of illegal services, from Napster to Popcorn Time⁶⁰ is a reminder that every time a service is taken down, a new and improved one steps in to fill the gap.

The Bridge Building challenge is how demand can be created to support the progress in removing diversity barriers.

CO-PRODUCTION

One highly effective diversity strategy is **co-production**, which has ensured that films from countries with relatively small populations, or with little public or private investment, can make films.

In six of the 10 countries of the so-called New Europe, co-production makes up more than half of all productions.⁶¹ The regional film funds body CineRegio (which has co-commissioned this report) is among the most active participants.

Co-productions, according to CineRegio, bring "many great benefits to producers, such as enlarging financial opportunities, which in turn reduce financial risks and secure greater distribution and exploitation, providing better access to talent from other regions and open production opportunities."⁶²

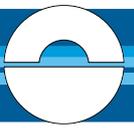
It is also understood to be an important factor in increasing circulation in participating countries. In turn, those local products help create demand and build regional and national film cultures.

While the issue here is the ability of co-production to improve diversity, it should also be noted that it has produced great art. 2009 Palme d'Or winner, Michael Haneke's *White Ribbon*, for example, was a Germany/Austria/France/Italy co-production supported by Cine-Regio members Film Fonds Wien and Mitteldeutsche Medienförderung;⁶³ and the 2013 winner, *Blue Is the Warmest Colour*, itself a model of on-screen and off-screen diversity, was a France/Belgium/Spain co-production.

Various European bodies have given support to co-production, recognising its strengths in terms of cultural diversity and cultural cohesion.

Supporting co-production is one of the core functions of **Eurimages**, the Council of Europe body set up in 1988.⁶⁴

The benefits of co-production extend beyond Europe. In 2015, Creative Europe announced a scheme for existing EU film funds that would enhance co-productions between with non-EU countries.⁶⁵



3. DEFINING DIVERSITY

- The definition of 'cultural diversity' has tended to focus on production but there is now greater recognition of the need to bring audiences into the equation.
- Defining diversity operates on the dividing lines between differing social and political beliefs.
- Concepts, such as cultural cohesion, multiculturalism and political correctness, are all important and divisive factors in formulating policy.
- The definitions, and supposed dichotomy, between culture and commerce, are an issue in formulating policy and business models.

IN BRIEF

It is 15 years since the European Union adopted the slogan 'Unity In Diversity',⁶⁶ which tries to express a sense of collective strength through sharing and embracing the cultural variety of member states.

It is a simple, noble sentiment that becomes much more problematic when put into practice. The balance between the 'unity' and the 'diversity' can turn into serious political disputes: It was a factor in the Greek crisis, and will be again in the forthcoming UK in-out referendum.

A political and social union, as opposed to a common market, requires a willingness to subsume a degree of local cultural sovereignty to the collective whole in cultural, as well as economic terms.

The EU has established a sense of European identity that can happily co-exist with regional and national identities and is accepted by a majority of people in most countries (although the rise of populist national parties may prove a long-term challenge).

The more that identity is defined, the more difficult it becomes, with the link between EU culture and Christianity being a particular issue. The sense of cultural unity has also been under strain in recent months: not least on the waves of the Mediterranean, in the migrant camps of Calais and in Ukraine.

An interesting test of the strength of Unity in Diversity is how far EU migrants, with a constitutional right to move within their own continent, are accepted as fellow citizens in their adopted countries.

Nationalist parties have turned tensions about diversity into an effective political tool to break into the mainstream.

These political debates illustrate that diversity is not a single, unambiguous concept.

Film may seem on the margins of these debates but its diversity discussion is actually the broader political, social, economic and cultural debate in microcosm.

The practical reforms suggested so far have been very much centred on the practicalities of creating a more inclusive production base.

But there are much bigger themes that are beginning to exert themselves: the role of culture in an inclusive Europe with a shared identity; the rights of all citizens to access culture on their own terms; the potential for film to become the critical means of self-expression in an age of ubiquitous media.

In a sense, the discussion is an optimistic one, accepting that the language of film will have a central role in European culture.

The problem with expansive discussions, however, is that they lack focus. The term diversity lacks focus and it needs to be defined at the start of any strategic plan.

There are already a wide variety of definitions:

CULTURAL DIVERSITY

Until recently, the word diversity was most commonly used in film with reference to 'cultural diversity'.

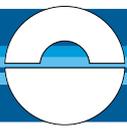
Cultural diversity is the ostensible justification for the public funding, without which most European film would struggle to survive.

The idea is enshrined in the principles of UNESCO's Convention on the Protection and Promotion of the Diversity of Cultural Expressions.⁶⁷

Film and other creative industries have lobbied hard to ensure that cultural diversity is protected in free trade agreements, particularly with the US. In practice that means ensuring public support for culture is not subject to the same rules on free trade and competition as other areas of business.

Cultural diversity has allowed for the development of a distinctive European approach to film, which is able to tell stories and create art that pure market forces could not support.

It has allowed Europe to develop models of support that have increased production, helped build viable and sustainable companies, and it has ensured that voices and ideas from smaller countries and regions can be heard.



3. DEFINING DIVERSITY

Members of CineRegio – the body that brings together Europe’s regional film agencies – supported 35% of all European films at Cannes in 2015.⁶⁸

There are two gaping holes in the record, however.

The first is that cultural diversity has failed, so far, to ensure that the film is representative of the full diversity of talent and audiences in Europe.

The under-representation highlighted in this report severely weakens the claims that film has a unique and pre-eminent place in European culture.

Other industries are already making the case that film does not hold an unchallengeable cultural position.

The games industry, for example, has been arguing that it too now represents an equally valid form of expression, as well as being a driver of economic value. A tax break scheme for “culturally British” video games industry was finally approved in 2014 after a ruling from the European Commission that it did not breach state aid rules.⁶⁹

It has become customary to talk about games as partners, rather than competitors, and indeed that may be true in the creation of new kinds of IP and cross-media work.

There is no question that games and many other creative industries, perhaps not yet invented, will be in a fight for a bigger share of the same public funding over the coming years. Diversity may become the decisive issue in deciding who wins and film cannot rely on past glories.

The other serious question for cultural diversity is audience reach and engagement. The fragmentation of the audience is a serious challenge. (See Chapter 10)

The European Commission has moved the circulation of films in the EU higher up of its agenda, not least because big increases in production numbers have not resulted in greater cross-border reach for EU films.

A critical question is now on the table: If there is free movement of labour in EU, why is there not free movement of content?

The European Commission has already put highly disruptive ideas into the mix, including proposals for a Digital Single Market, which challenge the system of territorial rights on which the industry business model is founded. (See p. 55 for more).

Cultural diversity remains a steadfast commitment in the EU but its interpretation may change, and film needs to stay ahead of the game.

CULTURAL COHESION

Cultural cohesion was one of the founding principles of state support for the broadcast and film industries in Europe.

There were political motives from the earliest days.

The inventors of radio thought they were creating a two-way form of communication. The concept of a joint television/telephone goes back to the 1890s, while the first amateur film cameras were patented in the 1890s.⁷⁰

National governments were not interested in film becoming a democratic means of expression, particularly in turbulent political times.

In some countries, broadcasting and film came under propaganda ministries, or firmly state-controlled institutions.

In others, it was an arm of the state with the patrician, if less malign, intention of creating and maintaining a common cultural identity, binding together a nation (which was often fractured along class and political lines.)

The founding mission of the BBC in the UK reflected the general thinking of many nascent broadcasters. The first Director General of the BBC in the UK, Lord Reith, said the new service would “educate, inform and entertain” – and he meant in that order.

The great public service broadcasters of Western Europe were built on the principle of a shared national culture and they had a huge influence, if not entirely a monopoly. It ensured that those brought up in the pre-Internet Era from any part of society share the same broad cultural references.

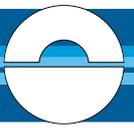
One can make a good case that gatekeepers claimed power for themselves and held back diversity. It certainly created a clear Establishment, which used powers, such as censorship and control over programming, to try to shape how people thought.

On the other hand, a common frame of reference did allow considerable room for subversion. To twist the EU slogan, there was room for Diversity in Unity.

The fragmented audience has far greater theoretical freedom today but many of the Net Native generation simply do not share the same cultural references, which is why film has sensibly put so much emphasis on schools.

The Internet has encouraged the idea that diversity means the individual liberty to freely access the content he or she wants.

On the other hand, it is a huge challenge to the European tradition of cultural diversity, with aspirations of speaking to the whole community.



3. DEFINING DIVERSITY

GATEKEEPERS AND CURATORS

The idea of cultural cohesion is closely associated with the concept of “gatekeepers” – elites tasked with deciding what can be made or watched.

Censorship has certainly been an issue but more enlightened gatekeepers in Europe were often responsible for screening socially, politically and culturally challenging content. And because there were so few channels, content could occasionally have enormous clout.

Many of today's film-lovers, and indeed film-makers, got their introduction to European film on the small screen because it was shown on television at a time when alternative choices were so limited.

Ironically, having little choice was a more effective means of building diverse audience for films than the vast range of options available today (though the genie is not going back into that bottle.)

Gatekeepers exercised their considerable power over what qualified as cultural content at a time when, firstly, societies were much less diverse in terms of race, religion and culture; and secondly, when there was a tiny number of alternative channels for content.

The absence of gatekeepers has defined the Internet Era so far. Attempts to impose gatekeeping measures to tackle pornography, piracy and terrorism, or to create advantages for big business on search engines, are already a major political and social battleground.

In recent years, there have been attempts to redefine gatekeepers as **curators**. In a world of vastly increased choice, there is an essential place of a trusted third-party, able to help navigate the ocean of content.

Cinemas, and particularly independent cinemas, continue to play a leading curatorial role for European film, building on local knowledge and brand recognition, which is rare in film.

Most public broadcasters have created specialist digital services and channels that bring together certain kinds of content; some VOD services, such as **Mubi**⁷¹, **BFI Player**⁷² or the VOD channels in the **Eurovod** group;⁷³ and the established curators of film festivals are also looking to break out beyond festival dates. (See p. 54)

This is the best time in history to be an arthouse film fan in the sense of access to great works, interviews, archives, etc.; but film has been all but invisible to the uninitiated, who are unlikely even to stumble serendipitously upon arthouse films.

Curation for niche audiences is potentially big business, as evidenced by the rise of boutique cinemas for exclusive audiences, charging high prices.

In the emerging on-demand digital environment, there are competing views of what diversity means.

In one sense it is about ensuring that niche content reaches the full diversity of audiences on the platforms they choose.

But it might also mean that in a digital age, diversity comes through the provision of specialist platforms that cater only to the different niche demands of the full diversity of the audience.

The first is what most diversity policy is trying to achieve; the second is where the movement is taking place. That is a tough challenge for those aspiring to broaden the audience for European arthouse film.

MULTICULTURALISM

The debate about diversity in film is not taking place in a vacuum. It reflects broader issues about the nature of culture and society that actually divide, rather than unite Europe.

The fragmentation of the audience into niches is a reflection of the fragmentation of different social groups into their own cultural groups.

It is a deeply political issue in Europe with respect to race and immigration with a divide in outlook broadly split along the lines of ‘multiculturalism’ and ‘the melting pot.’

Should immigrants be allowed to maintain their own separate cultural lives and identity within the framework of the law, creating a ‘cultural mosaic’?

Or should the emphasis be on integration with the established national culture and identity of the host country?

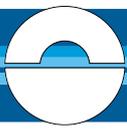
This debate has taken on a much greater prominence and urgency over the last decade in the wake of terrorist attacks and the *Charlie Hebdo* murders in Paris in January 2015.

It is relevant to the discussion of film diversity. For some, the task today is to ensure that a greater diversity of people are given opportunities to be part of a great European tradition of cinema, often associated with auteur theory.

It is not an entirely one-way street. The European tradition actively encourages diverse voices but within a clear framework.

In practice, so-called multicultural policies tend to be pragmatic and flexible about the framework, not pressing too hard on integration, unless laws are broken.

Nonetheless, the debate about cultural cohesion is now at the heart of cultural policy, and by extension needs to be considered in diversity strategy.



POLITICAL CORRECTNESS

Political correctness (PC) is a term that originated among left-wing groups in the US but was very effectively co-opted in the 1990s to suggest an authoritarian attempt to police thought and curtail free speech.

It is a difficult issue for European film diversity. Most of the time, so-called PC attitudes were a reaction to shockingly routine discrimination and casual stereotyping in the not so distant past. And there is evidence that they have made a difference.

A study from the Haas Business School⁷⁴, for example, suggested that 'PC' restraints on language and behaviour in working practice between men and women actually fosters creativity. According to study leader Professor Jennifer Chatman:

"Setting a norm that both clarifies expectations for appropriate behaviour and makes salient the social sanctions that result from using sexist language unleashes creative expression by countering the uncertainty that arises in mixed-sex work groups".

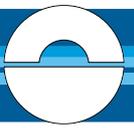
On the other hand, it is commonplace now to hear that the pendulum has swung too far the other way, and has genuinely become a free speech issue, holding back the diversity of content.

Political Correctness may be too toxic and loaded a term to have much value in the European diversity debate but the balance between freedom of expression and equal opportunities needs to be handled with care.

Finding that centre ground should be based on **informed research**, but that remains a rare commodity,

The liberal instincts of institutions have surely been called into question, as mentioned earlier in this chapter, by the fact that it managed to miss deep inequalities in its own business.

An injection of facts and knowledge would be a considerable help, as the following chapter will argue.



4. MEASURING DIVERSITY

IN BRIEF

- Measuring the diversity of film has value in its own right, revealing hidden truths but also identifying opportunities.
- Knowledge collection and analysis is a weakness in the film industry, not least because it is expensive for most small and medium-sized businesses (SME).
- Data has to be the foundation stone for diversity policy because it allows targets to be set and progress monitored.
- Big Data is powering the global giants of the on-demand world, which may have implications for long-term film diversity.

What is most shocking about recent reports demonstrating deep inequalities in film is their power to shock. How were those glaring disparities not already a major issue at the top of the industry agenda?

The simple answer is that the industry didn't know. Data is the missing link in the diversity debate.

In place of knowledge, there has been heavy reliance on those old unreliable favourites: instinct and conjecture.

What information has been routinely gathered and widely shared can be misleading, or of restricted value, including box-office figures (see below) – and data tends to be concentrated in the distribution and exhibition sector.

Writers and producers generally begin each project with a blank slate, and have already moved on to the next film before audiences have seen the last one.

Film funding bodies and institutions have traditionally worked from one project to the next without either routinely analysing data, or demanding that recipients of funding provide in-depth numbers.

The film industry has for many years been flying blind.

To be fair, there has not been a huge amount of pressure to change. The numbers that matter to funding bodies or government tend to be the grand global ones – productions numbers and jobs created, total revenues, foreign sales, competition wins, notional contribution to GDP, etc.

These numbers are often overwhelmingly achieved through a small number of headline successes each year and the ability to attract Hollywood shoots through tax incentives.

Often research takes the form of what might be called 'fig-leaf' consultancy – work commissioned to justify rather than deeply question actions and avoiding any real challenge to the status quo.

Those reports often disappear into archives without little impact beyond their initial short-term aims.

There are important research and data collection bodies with influence in policy-making, including the **European Audiovisual Observatory**,⁷⁵ while private research companies and international bodies, including **UNESCO**⁷⁶ generate and analyse important data.

Many national bodies have their own specialist research arms that provide valuable data, essential to the industry and film policy. But there has been little interest in collecting the kind of granular data that might drive a more diverse industry.

There are a number of obstacles to improving data collection including:

SMEs and scale

The simplest explanation for the failure to effectively collect and analyse data is that most of the European business is made up of small- and medium-sized business with low margins, specialist functions and little capacity in terms of time, people and money.

For producers, focused on financing and creating a single product over a prolonged period, data is a low priority. Audience and performance knowledge is limited in its effect in a value chain that has producers at one end and consumers at the other.

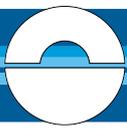
What knowledge is accumulated from one film is often lost.

Complacency

There is an argument that a small film industry with a limited number of influential networks and individuals is always at risk from complacency and hubris. The fact that it took so long for the gender imbalance to become a major issue is perhaps symptomatic of the problem.

The tone has been changing, however. High-profile studies and **impassioned events**, such as the European Audiovisual Observatory's Girls Just Wanna Have Film! conference at Cannes in 2014⁷⁷ have been a call to arms and there are advantages in being a small industry in quickly mobilising the industry behind an issue. Legal problems and privacy

Data is governed by rules, which can make it difficult to collect and share. These laws differ between countries.



4. MEASURING DIVERSITY

In France, for example, the collection of data on race is a hot political issue, particularly with respect to race and religion. In a country whose constitution is built on the idea that everyone is an equal citizen, regardless of race or creed, profiling and data collection can be divisive, and its collection for certain purposes remains largely prohibited under a 1978 law.⁷⁸

There are other issues, particularly around privacy and data protection. And the proposed replacement to the EU Data Protection Directive may complicate matters still further.⁷⁹

CHANGED ATTITUDES

Among the most worrying aspects of the whole diversity debate is how long it took the film industry to realise it had a problem. It might reveal institutional issues that need resolving before diversity strategy can really have an impact.

Whatever the case, film is playing catch-up, though there has been a flurry of initiatives to try to build a knowledge base on diversity.

Eurimages launched its **Gender Study Group**⁸⁰ in 2012, which has already carried out valuable research and has quickly become an important network.

The French Government signed a Charter in 2013⁸¹, which committed to increase research and the establishment of an '**Observatoire de l'Egalité**' to help understand and monitor inequalities between men and women in film.

The French national body, the CNC, carried out its first piece of **research into women in film** in 2014.⁸²

Media conglomerate Vivendi has also established a **Laboratoire de l'Egalité** as a means of establishing a knowledge base for equality in film and music.

The diversity data gap has been recognised by many public bodies, with research taking a more prominent role in many institutions.

The Danish Film Institute, for example, has commissioned in-depth work on assessing the need and impact of diversity,⁸³ beginning with an impressive report on ethnic minorities.

One important area that deserves – and to an extent is receiving – greater prominence is academic research and study. Universities offer a wealth of research and has, to an extent, the capacity and inclination to consider deep underlying issues.

Among many interesting and active academic research networks are **Migrant and Diasporic Cinema in Contemporary Europe**⁸⁴, the

Screen Studies Group⁸⁵, the **Film Festival Research Network**,⁸⁶ and the **Erich Pommer Institute**.⁸⁷

The links between academia and industry has been growing. The Sundance Institute and Women In Film in the US commissioned the **University of Southern California** to carry out valuable research into the cause of gender inequality, which was released in 2015.⁸⁸

SHARED DATA

If Europe's main disadvantage is that it is made up of too many small institutions without the experience or financial muscle to compete with the Big Data giants in Hollywood and VOD platforms, the logical response is to share.

While individual institutions and SMEs have only limited capacity to collect data, the cumulative knowledge gathered by all such bodies and businesses in Europe could be of enormous value.

Shared data in Europe is becoming more common. European agencies have been funding the **European Audiovisual Observatory** since 1992.⁸⁹

Cinando⁹⁰ was founded by the Cannes Film Festival's Marché du Film in 2003 and has become a valuable and extensive resource for industry.

A number of public bodies have also become more insistent on the sharing of transparent data.

The British Film Institute, for example, has released a series of **Insight Reports**⁹¹ on new release models for film that offer a complete picture of costs and revenues, alongside insight into the challenges for producers and distributors.

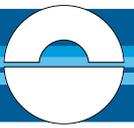
On the other hand, there is still reluctance to share knowledge and data, despite evidence that small companies along the value chain have more to gain from cooperation than might be lost by giving insight to competitors.

Voluntary knowledge exchange has become a major part of Internet culture. Experiences are now routinely shared by film-makers on online video sites, such as YouTube. (See p. 39)

TRANSPARENCY

Ironically, in an age where every digital action leaves an indelible footprint of data, the knowledge base for film has been shrinking.

Box-office figures may be limited in their scope but they are paragons of openness and clarity compared to those provided by VOD platforms.



4. MEASURING DIVERSITY

The major subscription-based SVOD services, such as Netflix and Amazon, are businesses based on Big Data and they are, perhaps unsurprisingly, reluctant to reveal much more than basic information about film performance.

Given that on-demand consumption is likely to be central to the future of film, the **knowledge gap** is serious.

Industry and policy-makers looking to establish a stable, viable and profitable VOD market in Europe – are condemned to work in the dark, unless there is a major change of attitude.

The lack of deep knowledge undermines efforts to make informed strategic decisions that might have a major impact on the diversity of content produced and audience engagement.

Two potential approaches are possible to ease the problem. The first is **regulation**, demanding the release of specified data. The VOD giants want to establish themselves in countries and data transparency might be a key negotiating point.

The second option is voluntary sharing of data.

In 2013 in the US, John Sloss, founder of Cinetic Media and the Producers Distribution Agency, called on distributors to **voluntarily provide comprehensive figures** on revenues from Video On Demand platforms.⁹²

He suggested that posting full results across all platforms would create a more open and competitive market.

Such a step would strongly support new business models (See Chapter 8) but might also contribute to the understanding of how audiences watch film in a digital age. So far his call for action has not been followed in Europe.

SUCCESS CRITERIA

How success is calculated and measured is an important diversity issue in its own right.

As already mentioned, success criteria for film are often designed to impress governments, in particular demonstrating that film is an investment that brings tangible rewards in terms of jobs and GDP, rather than a spending burden.

Two measures are particularly important:

- Commercial success, as defined by revenues and admissions;
- And artistic success, largely defined by recognition from peers inside the industry, through awards and festival selection.

Festival nominations and awards sometimes have a direct link to commercial success but they are generally deemed as having value in their own right.

Indeed, a film that is a critical success but a box-office flop is often given a higher status than a critical flop but box-office hit.

At least, those two measures (box office and awards) have the benefit of transparency.

On the other hand, they are not as objective and neutral as they seem, and there are arguments that they help cement hierarchies, and discourage new voices.

The dividing line between commercial and arthouse film is arbitrary. The simplest illustration of the point is that the most mainstream films are miraculously transmogrified into niche arthouse fare in other countries with the simple addition of subtitles.

Box-office numbers, at best tell a partial truth. They capture sales in the tiny window of opportunity – normally dictated by one weekend – afforded to European non-national films. There are a variety of factors, unrelated to the quality of the film that may affect the results, from a competing title to the weather.

The potential to break out into the wider public consciousness, or to enjoy an extended run is weak, even for films that generate strong word of mouth.

At the other end of the scale, arthouse success is decided by a small elite with particular tastes. Aficionados and experienced industry players instinctively know when something is a 'festival film' and can take a pretty good shot at whether it will win awards.

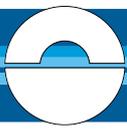
Films are financed and made, perhaps unconsciously, in order to win the appreciation of peers. That fact, in a small industry, can end up perpetuating and institutionalising the idea of a 'quality film.'

There is a huge creative gap between box office hit and award winner that is neglected. There are people working, often successfully in that space, in genre films, or in cross-media projects.

Their success criteria relates to audience diversity, social media reach, crowdfunding targets, audience participation and the creation of new IP.

THE DANGERS OF DATA

A warning from the IT industry might usefully be embroidered and framed in every film office: "Manage Your Data, Don't Let Data Manage You."⁹³



4. MEASURING DIVERSITY

Data is a good servant but a bad master: When there so little data, it is difficult to avoid the temptation to put too much faith in whatever has been collected, however weak or misleading.

And trying to fill the data gap requires skills which are in short supply, leaving the industry wide open to the traps described in the old warning - 'Garbage In, Garbage Out'.

Part of the problem is that individual regional, national and supra-national institutions will commission research when there is money available, or when a specific issue arises.

It has value at a particular moment and for a particular purpose but often sinks into obscurity and the kind of data that can make a contribution to industry diversity dates fast.

Clarity of objectives is essential to devising data strategies. The missing ingredient in film is not primarily technical - expertise can be bought in - but how the parameters of research and analysis of results are defined.

On the whole, the bigger the number, the more potential there is for the wrong conclusions to be drawn.

That is a clear and present danger in an industry where most research, for obvious economic reasons, is carried out at national or European level.

The obvious examples come from the box office. At Cannes in 2015, the fact that the EU market share of the European box office had increased was widely presented as evidence of the health of the industry, ignoring the reality that a tiny number of films accounted for almost all the change.

The top 25 European films (less than 1.6% of all productions) took more than 36% of admissions for EU-produced films in EU countries in 2014.⁹⁴ - a decade earlier, in 2006, the top 25 was nearly 3% of productions, and only took 30% of admissions.

Data timing

The film industry too often collects information at the point when the best it can do is demonstrate what went wrong.

A tool for 20-20 hindsight has very little immediate value, although it would be considerably more valuable if it was routinely collected and shared.

The most valuable knowledge for film and audience diversity would logically be collected in the earliest stages of a film production. (See Chapter 8)

It makes sense to base release strategies on knowledge of how targeted audiences behave, think and consume.

There are plenty of low-cost and sometimes free tools now available for gathering knowledge about the audience base, including **sentiment analysis**⁹⁵ and **web analytics**.⁹⁶

Data analysis might be most effective where they are combined with fresh approaches to film creation and production, including **crowdfunding** and **prototyping**. Those issues are considered in Chapter 8.

THE FUTURE OF DATA

Every one of the many studies into inequality in film and the media considered for this report puts research near the top of its recommendations.

Mainly, the call is for solid numbers to back up the wealth of speculation and conjecture that underpins the discussion of diversity.

That particular knowledge gap is gradually being filled. Many organisations have undertaken their own studies and many more are now being commissioned.

There is a good case for the creation of a **European database** that aggregates all of the disparate studies, allowing for more detailed analysis of the bigger picture.

A spate of studies has offered uncontestable evidence that there are serious inequalities in film production. In particular, it is clear that women are not getting opportunities in the key creative roles.

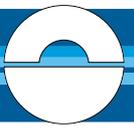
There is a smaller but compelling evidence about minorities, and particularly of people from BAME backgrounds in film - although these are weaker.

There is some useful work on the lack of engagement between young people and European cinema.

But the relationship between social class and cinema is a serious gap - and one that in itself demonstrates that the film industry and film institutions have big diversity issues to resolve.

The wider business world has made demographic analysis a critical priority for sound market reasons. Business needs to understand customers.

On the other hand, film has lacked market incentives to examine its social impact; and public policy and funding bodies have not made it a priority. It is also true that few film bodies can afford to employ the kind of high level research that is routine in global corporations.



4. MEASURING DIVERSITY

The answer might be much greater international cooperation to create **economies of scale** on research.

That might be best deployed in addressing a series of priority issues.

This report suggests the areas where inequalities are established but there are still significant gaps in the understanding the root causes of the lack of diversity in production.

They need to be filled before effective policy can be implemented – and before effective bridge building can begin.

The audience

As already mentioned, knowledge about the audience remains rooted in one part of the film value chain, and is struggling with a lack of transparency in key areas.

But advances in digital technology and social media have provided one simple means of gaining greater understanding of audiences: talk to them.

The barrier to consumer interaction today is not technical but cultural. For some it reeks of the market and the surrendering of individual inspirational auteur vision.

For some even a conversation is a compromise.

Other areas of business and culture around the world have recognised that a deeper understanding of, and interaction with, audiences is a very underused tool.

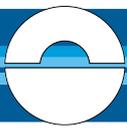
“Good storytelling is about intuition, informed by knowledge,” according to John S. Johnson, executive director of the **Harmony Institute**,⁹⁷ one of the leading innovators in understanding consumer demand.

Johnson says the appliance of science is allowing content creators and producers to understand patterns of behaviour that can shape development, marketing and release strategies.

And film-makers risk missing out in a competitive consumer world: “They (independent media producers) have seen researching their audience as a kind of taboo and they are going to find themselves in this future battle for attention completely outgunned.”⁹⁸

Targeting specific audience communities is critical to building bridges across social divides.

There are signs of change in Europe, with many film and arts organisations becoming much more focused on audience building, through tools such as **social media** and **crowdfunding**.



5. ATTITUDES AND INSTITUTIONS

- Outright prejudice is very rare in film but many of the individual and institutional attitudes may be hidden but deeply ingrained.
- Institutional cultural norms can be powerful with networks becoming self-perpetuating and sometimes self-serving.
- The history of film and the super-structure around film culture have a powerful hold on the way that the content and industry is perceived.
- Quotas are the most direct way of bypassing institutional attitudes but they come in different forms and are not always.

IN BRIEF

Open prejudice in terms of race, gender and sexuality is very rare in the European film industry and institutions.

A series of legal measures have effectively outlawed active discrimination (See p. 10), and there has been a powerful and progressive shift against any form of prejudice, particularly among young people.

It is easy to forget how ingrained attitudes were just a few decades ago and that today's more tolerant attitudes towards gender, race and sexuality are the result of long and painful battles.

Racial and sexual prejudice is not ancient history. The generation now leading the industry were brought up in an era of casual racism and sexism, even if they actively reject any hint of those prejudices.

The conviction of a number of UK television personalities in the last five years, who were allowed to abuse young women and men with seeming impunity in the 1960s, 1970s and 1980s, stands as a testament to a male-dominated culture that talent that felt it was above the rules.

European film was certainly not immune. "The whole world was sexist... Cinema was made by men. They were sometimes misogynist,"⁹⁹ said Agnes Varda, talking about the New Wave of film-makers who helped mould what we think of as European film in the 50s and 60s. (In 2015 became the first woman to receive an honorary Palme d'Or¹⁰⁰ at Cannes).

It is tempting to believe that today's problems will simply be swept away by a more enlightened generation but diversity and tolerance should not be taken for granted and may require permanent vigilance.

Anti-semitic attacks, for example, have been rising throughout Europe, while far-right parties across Europe have been successfully focusing on alarmingly high levels of anti-Muslim sentiment.¹⁰¹

The more substantive issue for this report is whether there are persistent attitudes within the industry that act as a barrier to diversity and how they might be overcome.

What is required, and has arguably not happened is a thorough self-examination by the film industry.

This chapter will concentrate on attitudes towards gender to illustrate possible areas where attitudes need careful and critical examination.

INSTITUTIONALISED ATTITUDES

A 2014 report by the French Laboratoire de l'Egalité, in partnership with Vivendi,¹⁰² makes a convincing argument about why the realisation of the need for an urgent debate about diversity came so late.

It suggests that the film industry was deceived by its own liberal myth. Inequalities crept in because it could not believe there could be stereotyping and discrimination in a culturally sensitive industry on the "left of the political spectrum".

"The undervaluation of women in the cultural field, no matter how verifiable, appears to be counter-intuitive. This may explain why it made an appearance in the public debate only much later than other fields (industry or politics, for example). Preconceived ideas have delayed awareness of this phenomenon."

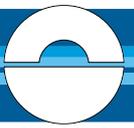
There are other important reasons why the diversity issue was underestimated – in particular the failure to systematically collect and analyse data. (See Chapter 4)

But there do seem to be legitimate questions about institutional attitudes, and there are signs of complacency about the dangers that come with being a small industry, based on relatively tight circles of influence.

It is possible for even the most committed liberal to lose touch with other people's realities. And it is all the more dangerous when the knowledge gap is not recognised and acknowledged.

There are logical answers to the problem, including the **collection and analysis of data** and research (See Chapter 4) and a commitment to deep **consultation**.

There is also a strong argument for much greater **decentralisation**, pushing decision-making as close as possible to the audience as possible.



5. ATTITUDES AND INSTITUTIONS

TALENT AND QUALITY

One prevalent attitude in the film industry hierarchy is the idea of 'colourblindness'.

Commissioners of content, festival selectors, critics, etc believe they can be trusted to treat every single film or application on its own merits, without fear or favour.

The immediate difficulty of that thinking is that 'merits' are not neutral.

Hjalmar Palmgren, director of funding at the Swedish Film Institute makes the case in blunt terms.¹⁰³

"You always hear that quality, and not gender, should be what matters. But this requires an objective quality measure. We used to have a system where men were given easy entry into the industry because of their gender, and not based on quality. There is no reason to believe that women make worse films and attract smaller audiences. The whole discussion is just silly – it's a non-issue!"

The idea that objective measures of quality exist, or at least that some people are objectively more qualified to make subjective judgements on the subject, is deeply ingrained in the industry.

There are practical as well as philosophical reasons underpinning the 'quality' argument. There is a finite amount of funding and lines need to be drawn.

And there are widely accepted 'natural' barriers to advancement: No one accuses the selectors of basketball teams of being prejudiced against short people; or orchestra leaders of bias against the tone deaf.

But quality control affords individuals considerable power, which should always be open to review.

The big guns for challenging norms and institutionalised attitudes are **quotas**, which effectively take decision-making over production support for films, or employment shortlists away from institutions, or from businesses. (See Chapter 6)

It goes against the grain of traditional European thinking.

The Director of the Cannes Film Festival, Thierry Frémaux made the point in 2012 in response to calls for affirmative action¹⁰⁴ to address the desperately low number of female film-makers selected for competition:

"As a citizen, I fully support feminist activism. As a professional, I select work on the basis of its actual qualities. We would never agree to select a film that doesn't deserve it on the basis it was made by a woman. That would lead to a quota policy that would undermine the cause."¹⁰⁵

It should be noted that Frémaux was questioning tactics rather than the cause and he recognised that there were serious issues to be addressed. The Cannes Film Festival has been a champion of diversity in many respects, using its pre-eminent (and glamorous) status to promote extraordinary and challenging talent from all over the world.

And yet, in 50 years of the Palme d'Or, only one woman has ever won – Jane Campion for *The Piano*¹⁰⁶ in 1993. Films directed by women have made up an average of 1.6 of films selected for the Cannes competition since the year 2000.

The Berlinale has a stronger record with four winners of the Golden Bear: Peruvian director Claudia Llosa's *La Teta Asustada* in 2009; Bosnian Jasmila Žbanić's *Grbavica: The Land of My Dreams* in 2006; Ukrainian Larisa Shepitko for *The Ascent* in 1977; and Hungarian Márta Mészáros for *Adoption* in 1975.

But every one of those wins came when a woman headed the jury: Sylvia Syms (1975), Senta Berger (1977), Charlotte Rampling (2006) and Tilda Swinton (2009).

The issue is not the integrity of the festivals but whether the notions of quality are subconsciously biased.

Only seven of the latest influential Top 250 films of all time list, chosen for UK magazine Sight And Sound by 1,000 critics, were solely directed by a woman, and just two of those are in the top 200.¹⁰⁷ The *Cahiers Du Cinema* list of the 100 greatest films has no films by a woman.¹⁰⁸

The critic Pauline Kael, who died in 1991 – a woman in an overwhelmingly male field and the daughter of Polish Jewish immigrants – raised serious questions about the values of arthouse cinema.

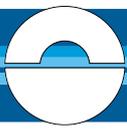
In her 1965 work *I Lost It At The Movies*,¹⁰⁹ she said: "the educated audience often uses 'art' films in much the same self-indulgent way as the mass audience uses the Hollywood 'product', finding wish fulfillment in the form of cheap and easy congratulation on their sensitivities and liberalism."

She also saw an ingrained and "adolescent" masculinity the application of auteur theory – the belief that great film came from the singular vision of a director.

In particular, she was concerned that judgements of quality were too narrowly framed. "I believe we respond most and best to work in any art form (and to other experience as well) if we are pluralistic, flexible, relative in our judgements, if we are eclectic ...

Eclecticism is not the same as lack of scruple; eclecticism is the selection of the best standards and principles from various systems of ideas."¹¹⁰

Kael was a polemicist but her question about standards make a good catalyst for **debate about institutional attitudes**.



5. ATTITUDES AND INSTITUTIONS

TYPECASTING

Many of the attitudes that hold back diversity are based on unconscious prejudices that are often the result of hidden but entrenched social assumptions.

On-screen stereotyping still exists, though clearly there has been considerable progress. (See Chapter 9)

Off-screen, studies continue to demonstrate significant typecasting of different social groups. The best documented is the difference between men's perception of the role of women in the workplace and their own.

Studies show that women are often felt to have specific strengths and weaknesses that mark them out for certain roles. In film, women often dominate roles in personnel and PR.¹¹¹

Consciously, or otherwise, women are seen as less capable of the major leadership roles, such as film director. And they are certainly judged less able to take the helm, for example, of action films.

Research from the University of Southern California for the Female Filmmakers Initiative (founded by the Sundance Institute and Women In Film)¹¹² suggests the perception of market demand is a critical factor in whether women get opportunities to direct a film.

In turn, women end up gravitating towards less commercial films for which they are more often selected, cementing the stereotype.

"Women's earliest storytelling experiences may reflect and reinforce the stereotype, directing their later career prospects to a less lucrative set of films. Following this, buyers and sellers may perceive that women lack the ambition or competence to direct the larger, commercial properties that open doors and create later opportunities."

One surprisingly persistent prejudice has been that that women are not as funny as men. Syeda Irtizaali, commissioning editor of entertainment at Channel 4, said comedy and entertainment remained an area in which women can be left frustrated due to "an inequality of attitude".¹¹³ The idea has deep roots and has probably been sustained in more recent years by the hard, even macho, culture of the stand-up circuit.

A generation of female writers and comedians in the US, including Tina Fey, Amy Poehler and Amy Schumer are rapidly killing off the unfunny label.

But established prejudices are hard to shake off. They often sneak out in seemingly innocuous terms that are not intended to offend, such as 'chick flick'.

Some industries and cultural institutions have introduced tactics for combatting hidden prejudice. One interesting approach from classical music is the **blind audition**.

Blind auditions have been widely used in orchestras since the 1970s, meaning that an interview panel is unaware of the gender or race of the musician. The results have been remarkable.

In 1970, just 5% of recruits to the top five US orchestras were women, but in 1997¹¹⁴ the number had risen to 25% with much of the growth being attributed to blind auditions.

The same approach would not be easy for film, though it would be interesting to see a festival selection with the submissions entered anonymously.

A more practical tactic is to change the make-up of **selection panels**.

Senior positions

One common assumption is that women do not want to take on senior management or leading creative roles, perhaps because they either lack that 'masculine' drive and ambition, or they want a more comfortable work-life balance.

It is not unusual to hear such ideas repeated in all professions, even by women. There are two responses to the point.

Assumptions should not be taken at face value. An extensively researched report from McKinsey & Company on attitudes in global businesses showed that 82% of female senior managers wanted to reach a top management position, just one per cent less than their male equivalents.

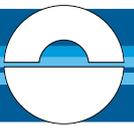
On the other hand, there is much research to suggest the bar is higher for women with children are still widely expected to take on a 'double burden' taking the lion's share of childcare, as well as business.

That is partly an issue for society as a whole and of policy makers in general. Norway, Sweden and Iceland have led the way on both paternity and maternity leave, including a so-called Daddy Quota to incentivise men to stay at home and share the child care.

The head of an employment association in Norway praised the idea for "strengthening the man's position in the family, and the woman's in the workplace."¹¹⁵

Similar, if less extensive, policies have been implemented in other countries. What it suggests is that it is possible to create equalities at home that allow those women who decide to have children not to feel pressurised or discriminated against.

There might also be room for serious study about whether **working processes**, and **career patterns** might be altered to accommodate women – and indeed men – with families.



5. ATTITUDES AND INSTITUTIONS

NETWORKS

Networks are natural; humans are social animals and evolution has taught the value of cooperation to achieve tasks.

In film, it is impossible to successfully navigate the industry value chain without creating a network of valued and reliable partners. Networks are based on trust. Producers routinely work with the same directors, who themselves may have long-term collaborators in editing, music, acting, etc.

These relationships may have been formed through shared ideas and ideals and knowledge of professional skills. Such networks, it could be argued, are natural and constructive. They can also be excluding and exclusive, and based on rituals and expectations.

That exclusivity can be accentuated, consciously or unconsciously, inside industry bodies, whose leadership is generally drawn from established networks. Institutions, normally based in rich areas of capital cities, and made up of people from similar backgrounds, can easily take on excluding group attitudes.

Social psychologists have devised a number of terms for the kind of self-perpetuating bias that can infect networks:

In-group favouritism: Bias towards one's own group does not necessarily imply antipathy towards outsiders, but more that anyone wishing to join the group is expected to conform to rules and standards already in place. Standards and norms can be perceived as objective when in fact they are subjective. In other words, networks favour people who share the same basic thinking (people like us).¹¹⁶

Out-group Homogeneity Effect: Established groups tend to see themselves as diverse but those outside as much more homogenous than they actually are. The effect is frequently demonstrated in attitudes towards particular film audiences, which are often spoken about as if they represented a fixed and unified group (The Audience), whose views and tastes are fixed.

Looking Glass Merit: The desire (again often unconscious) to appoint people, or reward work that reflects oneself, or one's perception of oneself. This can be a particularly powerful effect inside organisations that are (or feel they are) successful and are looking for someone who can "fit in."

In all of those business practices, the decision-making process becomes influenced, not by an objective merit, or talent, or even experience, but by the psychology of the institutions.

The Schumpeter column in *The Economist* suggested that: "Those at the top of the consulting, investment banking and legal professions know that the most prized possession in uncertain times is not brain power, but self confidence. For all the talk of the world becoming dominated by a 'cognitive elite', in reality it appears it is nothing more than a "confidence elite".¹¹⁷

The idea of a confidence elite is very valuable. The idea that it exists barely requires verification by research – everyone has anecdotal evidence of people who can breeze to success, acting, in a telling cliché, as if "the world owed them a living."

Confidence of that sort is often associated with masculinity and with affluence and elite education, although it is not exclusively so. The good news is that it is largely a learned trait that is possible to teach. (Punch 'assertiveness training' into Google and it will return hundreds of thousands of results).

Confidence can only be built and maintained through opportunities to test it.

BAME comedian and actor Lenny Henry made the point before a UK parliamentary committee in 2014. He suggested what was needed more than anything else was the chance to make a mark. "Chiwetel Ejiofor and Idris Elba didn't need more training, they just needed a break."¹¹⁸ Seeing film as a set of skills to be learned might actually help demystify film and make it seem more accessible, suggests Oscar-winning director Steve McQueen. "People often look at the movies and see it as a Mecca on a hill but actually it's like any other job."¹¹⁹

CHANGING ATTITUDES

Diversity training is common in the corporate world for a number of reasons: while the enlightened have come to see the business value of diversity, companies in many countries are more motivated by the need to comply with equality legislation and by the potential costs of legal action by employees in discrimination cases.

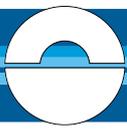
Film commissioning bodies and bigger companies with international reach have introduced new internal training and increasingly recommend, and sometimes demand, that the companies they commission are also thoroughly aware of policy and best practice.

Many now employ **full-time officers** and executives to oversee diversity and have created specialist departments devoted to particular groups. French media giant Vivendi, for example, has a board level director of Social Responsibility.¹²⁰

The British Film Institute (BFI) appointed its first Diversity Manager, Deborah Williams, in 2015.¹²¹ Williams had held a post with responsibility for equality and diversity at the UK's Arts Council.

The Danish Film Institute has a dedicated **Children & Youth Unit**,¹²² which has been very active in building participative programmes.

The role of dedicated Diversity Officers is still relatively new in many businesses and organisations and comes with some risks. Chiefly, there is a danger that diversity becomes marginalised as a specialist responsibility without the power to effect significant change across the whole institution.



6. QUOTAS AND AFFIRMATIVE ACTION

IN BRIEF

- Quotas are resisted by many in Europe as a challenge to the meritocracy of art but they are commonly used to restrict non-national content.
- Allocated funds for specific demographic groups have the benefit of simplicity and transparency of results.
- Quotas demanding that producers meet on-screen and off-screen diversity targets are more complex, and may have unintended consequences.
- There is an argument that the objectives of quotas could be achieved on a voluntary basis, though that might hide institutional biases.

The word 'quota' elicits an emotional response from industry, policy-makers and even from some of those who might be beneficiaries.

In Europe, there is some resistance to what is seen as an American concept that is neither necessary nor wanted here. It is sometimes conflated with another US import, 'Political Correctness'. (See p. 22)

Affirmative action and positive discrimination certainly have their roots in North America, going back to the Civil Rights era in the early 1960s.¹²³ They retain an often hotly disputed place in US life, particularly in academia and public bodies.

It might be argued that quotas are a very American response to a specific American experience and to the deep-rooted prejudice (conscious or unconscious) that infects even supposedly liberal institutions, particularly in respect to race.

Research revealing deep inequalities in European film suggests there is little room for complacency. There has been a growing body of film-makers arguing that quotas are necessary, if not indispensable to tackle inequalities.

Quotas are not a one-dimensional tactic.

For all the controversy, quotas are widely employed in Europe with almost universal support from the film industry, in the shape of limits on non-national content in broadcasting to support the local creative industries; and in the criteria for project support, which favours local film-making talent.

There are also informal selection criteria that are effectively quotas, even if they are not intended to be. Film festivals, for example, will generally show favouritism towards local films.

Affirmative action has been widely employed in business more widely, particularly in relation to the boards of listed companies. (See p. 12)

Views diverge when quotas are focused on employment, project support and particularly content. For some positive discrimination remains discrimination, and subjugates aesthetics to political priorities.

In fact, most positive discrimination is not intended to assure equality of outcome, but rather equality of opportunity.

US Supreme Court Justice Sonia Sotomayor in a 2014 case said most affirmative action "does not guarantee minority groups victory in the political process."¹²⁴

"It does guarantee them meaningful and equal access to that process. It guarantees that the majority may not win by stacking the political process against minority groups permanently."

There are other factors that cause resistance, including practical legal issues around equality laws; and there are psychological issues, including the fear of success being written off as 'tokenism.'

'Tokenism' is one of the most corrosive concepts in the diversity debate. The term may have started out as a criticism of patronising box-ticking exercises, but it has become a cheap shot at all forms of quota.

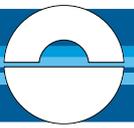
The fear that success might be interpreted as tokenistic means that some forms of affirmative action are resisted from within under-represented groups.

People understandably want to be seen to succeed on their own merits but that can become a way of sustaining an unfair *status quo*.

An interesting counterpoint to fears of tokenism, is the sense of entitlement and the extreme confidence that often characterises success stories from the dominant groups.

One of the factors keeping elites in power is a sense that a system in which they have succeeded must be working. Even those beneficiaries of nepotism can convince themselves that they must have natural talent, passed down through the genes.

Andrea Calderwood, producer of films including *The Last King Of Scotland* and *A Most Wanted Man* suggests that without the kind of confidence that comes with not being part of the dominant culture a woman director "still needs to prove herself to a level beyond that required for a man. The same applies to an even greater extent for non-white talent."¹²⁵



6. QUOTAS AND AFFIRMATIVE ACTION

Allocated funds

The simplest form of quota is the allocation and ring-fencing of **specific funds for the sole use** of an under-represented group.

The Swedish Film Institute's 2013–2015 National Film Agreement has taken the decisive step of announcing that: "funding shall be divided equally between women and men."¹²⁶

While the target is to increase the number of women in key creative roles, it is a 'gender-neutral' measure. In theory, the agreement might actually limit the number of films made by women in future.

The quota has the great benefit of transparency and it appears to be working. The target was hit in 2014, a year ahead of predictions.

The Danish Film Institute takes a similar approach to a different issue, demanding that 25% **allocated to films are made for younger audiences**.¹²⁷

In some cases, specific funds have been created, aimed at particular segments of the population. In 2014, for example, a **German-Dutch Co-Development Fund**, dedicated to original children's film projects, was created by the Netherlands Film Fund and Mitteldeutsche Medienförderung.¹²⁸

Such policies have transparent objectives and the great bonus of simplicity. They are positive measures, which create incentivised opportunities for under-represented groups.

What they do not do is punish those, generally small production companies, which do not have female creative leads, or which have strong stories that happen to feature only men.

The losers in such systems are only those who might have got funding for their project if 100% of film funding was available to them but that is a purely counterfactual argument.

In reality, the dramatic increase in productions in many countries over the last decade means that film-makers, who do not qualify for diversity funding will still have a historically high access to opportunities.

Mandated diversity targets

Another approach to quotas is to link access to public funds for film to the meeting of **specific diversity targets**.

The British Film Institute, for example, has introduced a system, under which producers need to tick a specified number of boxes in order to qualify for support from its Film Fund¹²⁹ and any BFI Lottery funding.¹³⁰

The scope of the diversity plan was extended in October 2013 to cover audience development, distribution and festival funds

The criteria include on-screen representation, off-screen employment and access to employment opportunities.

The measures, which have been welcomed by government and producer trade bodies, are wide-ranging in scope and there is a clear logic to its actions and objectives.

The BFI has also backed up the tick-box initiative with the launch of a £1m Diversity Fund, to support a range of initiatives.

Trying to address all discrimination in one go makes a bold statement of intent, which may have value in its own right. The BFI has been bold in ensuring that diversity remains permanently on the agenda.

The shared desire for action, however, should not discourage debate about the broad approach of imposing rules that have the potential for unintended, and even discriminatory, consequences.

The biggest danger, highlighted elsewhere in this report, is that top-down prescriptive diversity policies are devised by, and reflect the attitudes and conditions of established institutions, capital cities and the top tier of production.

Quotas for BAME representation, and employment opportunities for diverse candidates, are considerably easier to fulfil in the major population centres and university cities than for economically and culturally deprived parts of countries.

Trying to penalise lack of diversity may, inadvertently, cause further disadvantages to those working in, or considering investing in, poorer areas of countries: adding to the centrifugal force sucking production and creative businesses into the centre.

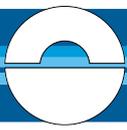
The other critical issue for employment quotas is that the diversity problem is pushed downstream to the generally very small companies in the production business. Less than half of companies in Europe make more than one film a year, and that proportion generally falls in rural and disadvantaged areas.¹³¹

Demanding responsibility for diversity down the food chain makes sense in one respect, recognising that real diversity needs to be delivered from the bottom up. But equally, those companies require investment to become more diverse, rather losing access for not being diverse enough.

The final pressing issue is about defining employment categories.

There is an argument for focusing on clearly measurable targets, such as gender and ethnicity. But the acid test comes when the issue of class enters the discussion.

Economic disadvantage is difficult to measure but it clearly is a factor in every other category of under-representation.



6. QUOTAS AND AFFIRMATIVE ACTION

Finding short-term solutions to the disadvantages of social class is extremely difficult in a quota system, not least because defining poverty requires drawing arbitrary boundaries.

A logical and measurable approach might be to focus policy on **supporting geographical areas of economic and cultural deprivation.**

Boards

The boards of film organisations often play a very active role in the development of film policy, strategy and funding.

Generally, boards are made up of people who have succeeded in the industry, and who have local and global profile – ‘the great and the good.’

In some respects, of course, that makes sense, given the importance of experience, knowledge and, perhaps most of all, business, international and political contacts. A film Establishment is perhaps necessary in a competitive environment.

Other areas of the elite arts often have stronger influence than film in the corridors of political power, and it makes a difference to funding.

What is essential is that Establishments recognise themselves as such. Boards often mirror the lack of diversity that has prevailed in the industry

The make-up of boards has become the centre of attention in other areas of business.

The introduction of quotas for non-executive boards in business has been growing across Europe, in terms of both worker representation and gender balance.

Germany, for example, has had co-determination laws, mandating employee places on the boards of major companies, since the 1950s; and in 2015, the country passed a law requiring 30% of non-executive board positions at listed to be allocated to women.¹³²

A number of countries have also now introduced board quotas, including Norway, France, the Netherlands and Spain.

The European Parliament endorsed a proposal for a 40% quota in European corporate boardrooms by 2020.¹³³ The proposer of the scheme, former commissioner for justice, fundamental rights and citizenship Viviane Redding said the directive would “serve as a springboard, handing women the hammer they need to smash the glass ceiling.”¹³⁴

The directive, and most legislation, exempts small businesses – and of course many production companies do not have a board.

The key public funding and policy bodies, however, are in a much greater position of strength. There has been considerable progress with

women at the top of many film bodies but the argument about the make-up of boards is more complicated.

The pool of experienced and qualified candidates is, almost by definition, going to be relatively shallow, given past inequalities.

In the wider business world, the problem of the pipeline of talent is being addressed. Among the recommendations of the Davies Report in the UK, which looked at gender inequality in the UK, included a proposal for a **database of qualified candidates** and more **targeted training.**¹³⁵

Many film institutions have also begun introducing a **wider range of experience** to boards, with experts from education, technology and other creative businesses.

Shortlists

US quotas are generally aimed at the interview stage, ensuring that candidates from under-represented groups are given an opportunity to meet decision-makers.

A high-profile business example is the Rooney Rule¹³⁶, which mandates that qualified applicants from ethnic minority backgrounds have to be interviewed for management positions at clubs in the National Football League (NFL).

It was intended to tackle a prevalent attitude that African-Americans made good players but poor tacticians. Objective measurements suggest that it has been a success.¹³⁷

In many European countries, mandatory shortlists are difficult. They potentially contravene equal opportunities laws as well as raising more philosophical objections.

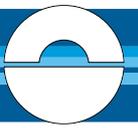
There are other options, however, including voluntary shortlists. Many film businesses and boards already operate informal quotas, particularly given the emphasis on diversity today.

ON-SCREEN QUOTAS

The British Film Institute’s diversity strategy provides a good example of an on-screen quota system.

Qualifying producers must be able to tick two of three boxes. One is about diversity of creative leads, the second about training and employment but the third relates directly to content.

Films must represent “On-screen diversity: diverse subject matter, at least one lead character positively reflecting diversity, at least 30% of supporting and background characters positively reflecting diversity.”¹³⁸



6. QUOTAS AND AFFIRMATIVE ACTION

The Eurimages Gender Study Group, founded in 2013, has committed itself to creating "Bechdel analysis" (see above) of scripts submitted in applications for support.¹³⁹

The approach has one unequivocal benefit in ensuring that there is on-screen work for a diverse range of people.

And there is an argument that seeing 'positive' images of diversity on screen subtly changes audience, and indeed industry attitudes. The idea requires further study: the relationship between on-screen representation and a change in attitude are patchy and need more work.

The best studies are more about the negative effect of certain images, and they too represent a challenge to the easy consensus.

The number of women on screen, even in named speaking roles, may hide other issues: there has been much debate about the effect of the predominance of beautiful, slim women on girl's body image and in the lack of roles for older women.

The idea of mandating content of a film in the name of diversity remains a divisive idea.

Firstly, it is open to interpretation: what exactly is a "positive reflection of diversity?" and who makes the judgment call? It may increase the diversity of on-screen employment but having the same privileged film-makers adapting their script to contain "positive" characters from working class communities they do not understand is a valid concern.

On-screen quotas, mandated by state bodies that try to influence scripts raise serious questions. The adoption of such controls by well-meaning institutions assume that current liberal values and consensus are permanent – but one does not have to look very far back in history to see how censorship intended for good can be turned to more malign purposes.

Even those from under-represented groups are sometimes resistant to attempts to police content.

The BBC in the UK introduced a more transparent and enforceable mandate that 50% of guests on comedy and topical panel shows should be female, addressing a very clear area of under-representation.

But the plan was opposed by respected female stars: "I know there has been a great push to get more female panellists on television, and I don't think that's the answer," said Sandi Toksvig, Danish host of a leading satirical quiz and founder to the Women's Equality Party.¹⁴⁰

"But if you get more female hosts, you'll immediately have more women taking part, without it causing any trouble at all. They bring a different tone and make it easier for other women to feel comfortable about participating, so I would be a big fan of more female hosts on quiz shows."¹⁴¹

Writer and feminist Caitlin Moran said she had turned down appearances on male-dominated panel shows because she refused to be "the token woman." She said she did not object to all male shows because they were "boys' game that work for boys. It's not like they built it to screw women over, it's just that boys built it so they made it to work for boys. If I go on there as a token woman, it's not going to work for me," she said.¹⁴²

The issue for some is not that there is something necessarily wrong about having television or films that are dominated by white males – it is that they are balanced by work that is made for women by women, or indeed other under-represented groups.

Some of the most vociferous opposition to quotas comes from beneficiaries. There is a strong concern that success might be interpreted as the result of special favours, rather than talent of hard work.

In 2014, in the UK, for example, there was a move at the country's public broadcaster, the BBC, to mandate women should make up half of the guests on games shows, or comedy panel shows.

TARGETS

Many companies set themselves **formal targets** for employment or support, even if they are not backed up by specific incentives or sanctions.

Quotas may contravene equal opportunities rules, or are felt to be against company policy.

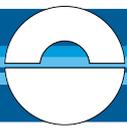
On the other hand, setting targets for addressing issues can hold much weight inside organisations.

The **Austrian Broadcasting Corporation**, for example, set itself an objective to increase "women's participation" to 45% in areas where they are under-represented.¹⁴³

Many other businesses, bodies and organisations operate informal quotas and targets that are not stated in public.

There are arguments for public and private targets. The first commits an organisation to action, with measurable results; the second offers some protection against accusations of tokenism.

The main issue is how far objectives reflect a real commitment to reform.



7. EDUCATION AND SKILLS

IN BRIEF

- Education is the primary means for engaging the next generation of film-makers and film-lovers but it has been a weak link in many countries.
- Film education faces practical barriers, including lack of trained teachers and film resources, though there are now strong organisations making an impact.
- Film education is a wide subject, taking in film appreciation, media literacy. The emerging area is film-making, although provision is patchy.
- The link from schools to places in the industry remains an area where diversity issues can arise.

Education is the quintessential bridge building tool, aiming to refresh the roots of film and ensure a future supply of fresh talent and engaged audiences.

In practice, education has historically been a weakness for film. In most countries, there is no formal place for film on the school curriculum (a huge exception being France).

In recent years, there has been much greater investment, often through partnership between industry and government in film clubs and other initiatives to expose children to film and to improve media literacy (See p. 37).

There has also been an expansion in the number of universities offering film and media-related courses. All of these changes have the potential to make important contributions to diversity.

The use of film as part of adult education can be an important tool for diversity but this chapter focuses on children.

Research consistently demonstrates that positive childhood experiences are among the most important determinants of whether any individual engages with cultural activities (as a participant or audience member) into adulthood.¹⁴⁴

The 2015 **Framework for Film Education**¹⁴⁵, drawn up by a group of academics, educators and film professionals, and led by the BFI, makes the case for a 'joined-up' approach puts diversity near the top of the agenda.

Its introduction makes the point that: "Despite film's ubiquity, its complexity and cultural richness, its social, historical and artistic importance, it has remained relatively marginal and underdeveloped in most European education systems.

This is not to deny film education's long history, nor the inspiring work of many people in many countries across Europe; but this work has only reached a few, when it is the birth right of all".

It offers practical approaches to turning those aspirations into actions but there are challenges in creating effective education programmes. One of the biggest is the lack of qualified teachers and a shortage of materials. A European survey of 6,700 teachers – part of a study coor-

inated by the Universitat Autònoma de Barcelona (UAB)¹⁴⁶ – showed that 60% never, or only occasionally used film in the classroom, and 88% said insufficient skills were an issue.

The resources are also not evenly spread across schools with a strong concentration of facilities in the richest and most privileged institutions; and governments around Europe have reduced or cut back programmes as part of overall economic savings.

Paul Collard, Chief Executive of the UK charity Creativity, Culture and Education¹⁴⁷ said the lack of equality in schools was already having a clear effect: "Elitism is becoming more prevalent in the arts but people and politicians do not seem willing to acknowledge the real foundations for it".

"It is massively going to impact on diversity in years to come because a whole generation of people will have had none of those opportunities or access to the arts ... And I think it will only get worse".¹⁴⁸

Training for teachers has made more promising, if uneven progress. Teacher instruction is a strong element of the UK's **Into Film** scheme, which has brought together disparate organisations into a single organisation.¹⁴⁹

Sweden is another of the few countries with a long history of film in schools, and the **Swedish Film Institute** has partnered with government on a number of teacher training initiatives, providing resources, including regular study guides and a magazine.¹⁵⁰

Other schemes are relatively new but ambitious. In 2015, the National Film Centre of Latvia and the country's National Centre for Education launched a comprehensive training scheme for teachers, called **Kino Skolās**.¹⁵¹

Another factor in the power of the film industry to tackle is **film licensing**, which 46% of teachers believe to be an obstacle to introducing film into lessons.

The licensing issue is sometimes a problem of perception and knowledge, rather than the law. But film has struggled to deal with 'fair use' issues in schools, and in finding the sources of copyright for films. The UK has helped resolve some of those issues, through a **copyright licence deal**, which allows all state schools to use of a range of films without having to buy an individual licence.¹⁵²



7. EDUCATION AND SKILLS

Such practical steps promise relatively short-term rewards. Film education strategy over the long term, however, is multi-faceted and can divide opinion.

CLASSROOM DIVIDES

The classroom may become the only place where a passion for film can be ignited in young people who may outside never otherwise encounter or engage with European cinema.

It is also the place where inequalities begin to take root.

An immediate divide in many countries is between private-fee paying schools and state schools and where there is academic selection.

In the UK, for example, the divide has been growing. Eminent arts broadcaster Melvyn Bragg said: "If you look at the actors coming through now – some of them are very good actors, I'm not decrying them – but many of them have been to schools such as Eton where there are theatres in the school".¹⁵³

"There are all sorts of massive facilities for training, as well as the connections later. But most people in this country don't have that. They have good, enthusiastic teachers, but they don't have those facilities".

Those patterns are replicated to a greater or lesser extent across Europe.

Exposure to European film

Many young people are simply not exposed to European film in their formative years. European films, and particularly non-national European films are rarely shown on television (See below). Many young people also have no access to a cinema.

The simplest and most important first step in any education policy aimed at diversity is to expose young people from all backgrounds to European film. Otherwise it is inevitable that film will be defined for them by Hollywood.

There are initiatives in Europe. The French **École et cinéma**,¹⁵⁴ **Collège au Cinéma**¹⁵⁵ and **Lycéens et Apprentis au Cinéma**¹⁵⁶ schemes have been running for more than 20 years, and their wide-ranging work includes cinema screenings which reach close to 1.5 million children.

The Belgian **Écran large sur table noir**¹⁵⁷ is another long-standing programme that screens films in schools. A number of cinemas have been running their own schools and youth initiatives.

The work of **Europa Cinemas** and its members in youth and school initiatives deserve greater attention. 20% of its support to cinemas is based on Young Audience development¹⁵⁸, with activities shared as best practice at annual Innovation Labs.¹⁵⁹

Among the most successful schemes are the **Kristiansand festival** of films for children, launched by Kristiansand Kino.

Film appreciation

For some in the European industry, exposure to the art form of cinema is just the start. The real aim should be the development of an understanding of what constitutes 'good' film, and an appreciation for the 'European tradition.'

A report commissioned by the CNC in France in 2014¹⁶⁰ makes the case that educating all children in 'European cultural film' has become a "political and economic necessity" in the face of Hollywood domination and a largely uncritical engagement with ubiquitous moving images on multiple devices.

The report by Xavier Laroux is a passionate (re)statement of the idea that film is: "a bond between citizens, a subject of conversation or debate, cinema is (in the same way as music, literature, the fine and applied arts) a medium characterised by its artistic aspect – in brief, by its direction".

The place of the auteur at the centre of a unique European model is open to debate, although the CNC report does insist that it is not recommending "imposing taste" but that the tools for the development of critical faculties are made available.

While many of today's cinephiles had no formal education, other institutions – including television, critics and cinemas themselves – united them around a clear canon of great film. Polls of all-time great films in Europe are remarkably consistent. (See p. 29)

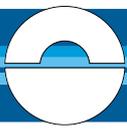
Media literacy

One recommendation of the CNC report is that film is taught as a separate art form, and not bundled up with the general lessons under the heading 'media literacy'.

Media literacy was first formulated as a serious academic discipline in the early 90s but the rise of digital technologies has turned it into a universal concern in Europe. It is commonly now seen as a critical driver of both social inclusion and economic growth.

The EU defines media literacy as nurturing "the ability of people to access, understand, create and critically evaluate different types of media".¹⁶¹ Media literacy work in formal and informal education is often led by partnerships with a wide range of stakeholders, including broadcasters, education, arts and cultural agencies, and government.

Media literacy is not an alternative to film training. The argument is that it provides the necessary foundations on which all other kinds of engagement are built. A European report suggests it creates skills in four essential areas: "access, analysis, evaluation and creative production".¹⁶²



Without those tools, engaging and participating in culture and indeed civic life is increasingly difficult.

A very valuable resource is the **European Media Literacy Observatory**,¹⁶³ which offers a country-by-country analysis of media literacy initiatives.

Sharing data is an essential means of spreading best practice on diversity.

Film-making

Content creation is often the weak link in education strategies, which is ironic. Film is a medium of expression that is, for the first time in history, now widely available to the full diversity of society.

The means of production, and indeed distribution, of some kind of moving image have become ubiquitous and cheap.

Mobile phones now routinely include high-quality video cameras and home shot content is now frequently uploaded to social media and online video sites.

Participation may be a critical link between young people and cinema. **Creating content** of their own may be the best way to ensure that young people understand and engage with the language of film.

A fascinating 2013 study in Norway – *Student Participation In The Cultural Rucksack*¹⁶⁴ – suggested that 13-to-18-year-olds most engaged in learning about the arts when lessons were “**participative and interactive**”.

Where education might play a key role is in helping children, and indeed adults, to learn what the great German director Volker Schlöndorff has called “another lingua franca, the language of the image”.¹⁶⁵

The Danish Film Institute has been among the leaders in encouraging children to make films as part of its wide-ranging youth strategies.

Its three **Film-X** interactive digital studios in Copenhagen¹⁶⁶ allow children to work in a professional environment and to work on special effects and post-production, followed by a screening. There is also now a mobile studio, **Film-Y**,¹⁶⁷ which travels to schools and communities. Films are also uploaded online.

The BFI in the UK is a partner in the **Young Film Academy**, which supports children’s film-making among teenagers.¹⁶⁸

The **New York Film Academy** has even begun running Film summer camps for children.¹⁶⁹

Encouraging film-making in schools does not automatically close inequality gaps. There is already big divides in the standard and access to equipment between fee-paying schools, or those in affluent areas, and the rest.

A number of education initiatives have been trying to address economic disparities, including Into Film’s **Keep It Showreel** scheme¹⁷⁰, in which (often disadvantaged) children with serious behavioural issues in schools were given the opportunity to make a film.

INFORMAL EDUCATION

In the absence of formal education, many older film lovers were given their education in film through television.

Programming European and art film was seen by the patrician gatekeepers of public television channels as a means of educating the masses, and of building social cohesion. (See p. 20)

Some European countries retain more of that spirit than others, but the realities of the digital market have fragmented the audience for film and pushed European film further away from peak times on the most watched channels.

Silke Wilfinger, Head of Acquisitions and Sales at Koch Media, told a Europa Distribution conference in Locarno in 2014 that German television channels had dramatically decreased the volume of European and arthouse films shown and prices had fallen, reducing audience access to content.¹⁷¹

Even in countries, such as Spain, delegates heard, where there are rules about the volume of European film on schedules, they are often relegated to the early hours of the morning when few people are watching.

The conclusion was that distributors and other participants **lobby public service broadcasters** demanding a better deal.

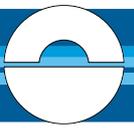
But the hard truth is that those broadcasters are themselves under pressure with viewer numbers and revenues damaged by piracy on the one hand, and the rise of Video On Demand platforms on the other.

FILM SCHOOLS

Film schools retain considerable power to shape and influence film. They represent elite training and are unashamedly committed to the idea of excellence.

And diversity is in their DNA in the sense of nurturing unique film-making vision and originality: they are judged by their ability to produce film-makers of originality and vision, rather than mere competence.

Those women directors who have broken through the barriers often attended major film schools, including Lynne Ramsay and Beeban Kidron (the National Film and Television School in the UK)¹⁷², Claire Denis and Emmanuelle Bercot (La Femis¹⁷³ in France), Agnieszka Holland (FAMU in Prague)¹⁷⁴, and Susanne Bier (National Film School of Denmark).



7. EDUCATION AND SKILLS

The biggest and best are also deeply internationalist institutions with the brightest students expected to make a mark on the global stage and often drawn from a wide range of nationalities.

Many film schools offer exchange programmes and other forms of networking that allow a diversity of students to broaden their experience. Film schools generally promote their 'colourblind' credentials, claiming to actively encourage people from the full diversity of backgrounds to apply.

In any case, the pursuit of excellence is not the enemy of diversity per se. Those given opportunities under diversity policies are not necessarily going to be less motivated to explore the limits of their talent.

The elite film schools are themselves introducing measures to improve the diversity of entrants. Most already have **scholarships** for economically disadvantaged applicants. And there is evidence that film schools are well ahead of the industry as a whole in gender parity, with close to a 50-50 split in some leading institutions.¹⁷⁵

And new alternative opportunities are emerging, including an expansion of film training through universities, and through new film schools, such as Luc Besson's **L'École de la Cité** in Paris,¹⁷⁶ which offers free courses with no demands of academic qualifications and aiming to "ensure the diversity of movie output tomorrow".

There are questions about how far historic domination by men is still exerting influence on what is learned in film schools.¹⁷⁷ A thorough analysis of entries to film schools, the courses they take, and outcomes would be valuable to assess the relationship between the institutions and diversity.

But the bigger questions remain: why hasn't the progress made in education had an impact on the industry?

TRAINING AND SKILLS

There is no shortage of training schemes in the film industry, or of scholarships and bursaries to increase the range of applicants.

Many schemes directly target minorities, with organisations, such as Creative Skillset¹⁷⁸ in the UK, in the vanguard. The creative industries training body launched a major **Diversity Fund** in 2014.¹⁷⁹

Among the targeted services are **Babylon**¹⁸⁰, aimed at supporting film-makers, producers and writers of "culturally diverse origin" in developing stories and making an impact in the industry. Its 2015 programme was supported by the Vienna Film Fund (Film Fonds Wien) and Baden-Wuerttemberg Film Fund.

Training schemes for disadvantaged groups have also been created by private businesses and funds, including the **Sky Arts Academy**.¹⁸¹

Film training may get a diverse range of people into the industrial sphere but it does not necessarily help them reach their potential. Eventually, the bright candidate is going to hit one of the barriers raised in this report.

Plenty end up echoing the words that screenwriter Colin Welland puts into the mouth of the Jewish British athlete Harold Abrahams in (Bechdel failure) *Chariots Of Fire*: "I'm semi-deprived. They lead me to water but they won't let me drink".¹⁸²

Peter Buckingham, co-founder of SampoMedia and former Head of Exhibition and Distribution at the UK Film Council and British Film Institute suggested at a talk in Amsterdam that many talent development schemes had an inherent weakness.¹⁸³

Public funding tended to focus on first and second films but did not adequately prepare film-makers for the market realities when it came to a third film.

"An output-based talent development programme based solely on producing films, risks encouraging people to begin a career in film, totally or near totally supported by the state, only for them to fall off an output-based cliff when they move outside these support cocoons. The paradigm that currently exists ... might be too output focused, rather like the old Soviet tractor factories. Output isn't everything".

Film training may get a diverse range of people into the industry but it does not necessarily help them reach their potential.

The growth of digital media has led to an explosion of training schemes with very little possibility of it turning into professional success. Courses may be oversold but this report suggests that there is a powerful need for a strong amateur and semi-pro sector, where learning skills will play a big role.

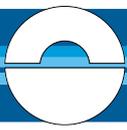
SHARED LEARNING

One of the great boons for new film-makers has been the **free-sharing of knowledge** and experiences on line.

YouTube in particular includes thousands of videos in which film-makers offer tips and advice on everything from film-making equipment, filming techniques to advice on navigating the complexities of the film industry.

The free sharing has been a particularly marked factor in the cross-media world, perhaps unsurprisingly, given the emphasis on prototyping and innovation. These sites can become informal networks and active communities. A long-established example is the Workbook Project.¹⁸⁴

The trend has not been exploited to its fullest extent by the mainstream.



8. PRACTICES AND PROCESSES

IN BRIEF

- The Digital Era has so far not lived up to the billing as the great leveller of opportunity – and may be accentuating some inequalities.
- Weak business models and under-investment, reduces opportunities for diverse candidates to build careers in generally small film businesses.
- Business models, practices and processes are out of kilter with the way that audience demands and uses content in the Digital Age.
- One major weakness that could be turned into a huge strength is support for a dynamic grassroots sector with links to industry.

“What’s changed is the ability of people who didn’t have the foresight to be born into wealthy families to earn a middle-class living in creative fields,” according to Scott Timber, author of *Culture Crash: The Killing Of The Creative Class*.¹⁸⁵

His argument is that the emergence of ecommerce, piracy and disruptive digital technologies has served to undermine a socially-mobile arts and creative sector.

The advent of digital technologies seemed destined to revolutionise the business models of film at the turn of the Millennium.

On paper, the road ahead was clear: the models of the old world were deeply inefficient and based on what seemed to be the digital irrelevances of windows, territorial licensing and the movement of physical commodities.

Suddenly, the big guns of Hollywood distribution and marketing looked like paper tigers.

It didn’t take long for the illusions to be shattered. The theoretically free access to millions of consumers online was anything but free in terms of costs and time.

Digital production and distribution certainly became easier but there was no short-term ‘digital dividend’ for the industry mainstream, even following the conversion to D-cinema.

Potential new online revenues were often eaten up by rampant piracy, while revenues from DVD and television fell away, with VOD nowhere near mature enough to fill the gap.

Jeff Zucker, then CEO of NBC Universal, captured a common sentiment in 2013, when he warned of “trading analogue dollars for digital dimes”.¹⁸⁶

Timber’s argument is that the old models of production and distribution were based on a degree of certainty that allowed for meritocratic career paths. Jobs in a strong commercial sector, able to compete on a world stage, would be among the most important contributions to diversity.

Today, aspirational people from poorer backgrounds, particularly younger people, who might have flourished in the creative industries of the post-war era, are finding themselves excluded.

The Internet, he argues, has actually magnified the power and revenues of a tiny few at the top.

Whilst not universally true of all of Europe, there is a growing sense that social mobility and working-class culture are being rolled back – and the arts, including film, are in the vanguard of decline.

This shrinking of the social base of engagement with the arts is tied up with other debates across Europe, including the highly-charged issue of ‘gentrification’ that is particularly strong in cities, such as Paris, Barcelona and Berlin.¹⁸⁷

Arthouse cinemas, alongside vinyl stores and third-wave coffee shops, are often a sign of the (mostly) benign early stages of gentrification.

Relatively affluent, often educated and culturally-engaged people seek out socially-mixed, diverse communities that are a contrast to bland suburbia.

But over time, the plus sides of regeneration, which are enjoyed by much of the community, begins to attract more newcomers, who push up costs, eventually pricing out the original inhabitants, and destroying the very reason why the original incomers moved in the first place.

Writer and critic Stuart Maconie makes an interesting comparison between that process and what has been happening in the arts and media. He talks about “a curious gentrification of pop culture”.¹⁸⁸

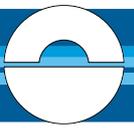
Many of the arts that were once engines of social mobility, including film, photography and particularly popular music, have become increasingly dominated by educated and relatively wealthy white men.

Without wishing it, the dominant classes and culture are undermining the diversity they earnestly wish to support.

RETRENCHMENT

Scott Timber’s case about Internet culture is overstated, drawing conclusions from what remain the early stages of digital evolution.

His identification of the symptoms in the industry as it stands today, however, are more convincing.



8. PRACTICES AND PROCESSES

Major changes in diversity tend to happen at two distinct points: during periods of decline, malaise and social unrest, requiring an injection of new ideas; or during periods of stability, in which career options and jobs are widely available.

There is a case to be made that European film would be in that first stage of decline without the intervention of public funding.

The support of cultural diversity policies, fiscal incentives and a degree of protectionism are keeping away even a hint of crisis. (Although the European Commission's Digital Single Market proposals have shaken things up. See p. 55).

There are, however, significant issues that are having an impact on the ground.

Diversity policy is largely made at the top of film institutions but delivery is left to small and medium-sized production enterprises. (SME)

And pressure on both sources of finance and revenues means many SMEs are having to retrench, concentrating on getting the most out of the existing team and making more conservative choices on content.

JOBS AND CAREERS

One symptom of retrenchment and cutbacks that is common to many businesses is reliance on internships over apprenticeships and training.

The use of unpaid interns remains an important source of work in many companies.¹⁸⁹ Such posts are a proven way into the industry but it means working for nothing, or for very low wages. That often precludes people from poorer backgrounds.

Countries, including Spain and Italy, have introduced laws mandating a minimum wage for interns.

There have been attempts in some European film industries to address the problem through **paid internships**, aimed at under-represented groups. Examples include the UK's Creative Access scheme.¹⁹⁰

The BFI has made paid internships for diverse candidates a key point of its diversity strategy.¹⁹¹

The internship debate is a reminder that the main diversity issue in terms of young people is jobs.

Diversity is most commonly associated in Europe with the arthouse sector, which is indeed where the wide cultural diversity of European film is most evident.

But a significant number of working class youngsters will look at weak business models, small audiences and little engagement into their

own communities and conclude that film is a rich person's hobby, not a career opportunity.

Job opportunities and routes into business might best served by a powerful commercial sector in Europe that would retain talent, grab a share of emerging markets and provide a strong new route into film for the full diversity of talent.

Sustainable businesses are the sources of training, apprenticeships and career ladders. And for those that show particular skill, there may even be places in the lead creative roles.

In the mid-2000s, there were a number of attempts to recreate something akin to the old European PolyGram Filmed Entertainment studio, which shut in 1998. A combination of economic downturn and changing audience habits put pay to some of those ideas.¹⁹²

As stated in the Chapter Nine, there are issues about the lack of on-screen diversity in competing in global markets, in terms of casting, story and even language – another reminder that diversity strategy is not a matter of a fixed path to progress but a set of difficult and sometimes contradictory choices.

AUDIENCE IN THE MIND

A major report from global business consultancy McKinsey in 2015¹⁹³ concluded that the most diverse companies financially outperform the least diverse by 35%, because they employ people who think and behave like their customers.

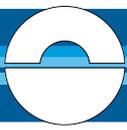
"While correlation does not necessarily equal causation (greater gender and ethnic diversity in corporate leadership automatically translate into more profit), the correlation does indicate that, when companies commit themselves to diverse leadership, they are more successful".

"More diverse companies, we believe, are better able to win top talent and improve their customer orientation, employee satisfaction and decision making, and all that leads to a virtuous cycle of increasing returns".

The research covered more than 350 companies around the world. In the UK, the data suggested that a 10% increase in gender diversity delivered a 3.5% lift in pre-tax earnings.

There are strong self-interested reasons then to employ a wider diversity of talent.

But, quite rightly, a big majority of the European industry will point out that most companies in the film industry do not have the same room for manoeuvre as global corporations.



8. PRACTICES AND PROCESSES

Yet the core sentiment holds true: reaching any particular target audience is considerably helped if the producer of a film has some idea of how that audience thinks and behaves.

That is now an achievable goal but it requires changes in a linear film value chain that still has producers at one end and audiences at the other – and neither the processes nor the incentives to make the connections.

A more audience-centred strategy requires a change of mindset. Producers need to think about building communities of demand at the very earliest stages of production – or to use the title of the last CineRegio report in this series, to have the “*Audience In The Mind*”.¹⁹⁴

As Chapter Five argued, the essential ingredient to that new thinking is data; and not just data but thorough and focused analysis. There are other potentially important trends.

DIY

The initial, and logical, instinct when looking at reforming the divided value chain, was to cut out the layers of distribution between production and audience.

There has been some enthusiasm for the idea of Do-it-yourself (DIY), or direct distribution models, in which producers takes control of the product from camera to consumer.

A growing number of micro-budget films have used the direct approach with varying degrees of success. (Some are documented in detail in Insight Reports, produced by the **New Models Fund** of the BFI, which have supported some DIY films).¹⁹⁵

Others have found that distribution and marketing requires skills and experience that are not necessarily those of a producer.

Most seeking new routes to consumers have tried to create hybrid approaches, working with distributors on a proportion of local or international rights, but using tools, such as Distrify¹⁹⁶, Assemble¹⁹⁷ and even BitTorrent¹⁹⁸ for the rest.

Crowdfunding

Crowdfunding offers a number of benefits to diversity. First, it supports the funding of films, through generally small individual donations, that might otherwise slip through the net of public or private funding.

Significant sums of money are being raised through crowdfunding services, such as Kickstarter, IndieGoGo and Tauscoprod.¹⁹⁹ Kickstarter, for example, topped \$1.8bn in donations in 2014, with nearly 9 million backers supporting close to 90,000 projects.²⁰⁰

European films have been among the high-fliers in this emerging field. Among the biggest successes is the genre-bending sci-fi *Iron Sky* series, from Finland: it raised more than \$600,000 from the first film, and \$740,000 for the sequel.²⁰¹

But more importantly, perhaps, crowdfunding is a means of creating audience relationships in the earliest stages of production.

Many public funds have supported crowdfunded films but some are now actively encouraging a broader take-up of the approach. **Creative England** has been among the enthusiasts and has built a relationship with UK service Crowdfunder²⁰² which is at the centre of its iShorts programme.²⁰³

Early stage development and prototyping

One of the weaknesses of European film in reaching audiences is that every new film is both the prototype and the final product.

The interaction with audiences does not take place until release with very little time to create brand awareness. It weakens the diversity of the audience for any given film, but also encourages conservatism in projects, with clear advantages going to films with existing pre-awareness, notably remakes, adaptations and sequels.

In the games and software worlds, testing products with audiences in the early stages is a critical tool. Prototypes and beta tests are standard.

Film producers have the capacity to test ideas with target audiences in the early stages of development but it is not part of the film culture but that may change.

In 2015, Ffilm Cymru Wales* launched what it is called a **Magnifier scheme**²⁰⁴, a shared learning community for funding applicants in the earliest stages of production, which aims to help build strategies for data, audience development and new IP value.

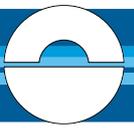
BUSINESS SUPPORT

The measures in this chapter all address the problems of failing business models and the prospects for creating new ones.

They may indeed prove to be fundamental in creating business conditions that encourage the full diversity of citizens to take the leap into the industry.

One practical issue that enlightened film bodies are beginning to address more systematically is the running of the business itself.

* The author is chair of Ffilm Cymru Wales



8. PRACTICES AND PROCESSES

Film business support and training might be crucial for all, but there is a strong case for specialist support that directly targets under-represented groups. There are **voluntary networks** already in place, including The Story Exchange²⁰⁵ aimed specifically at women entrepreneurs.

CROSS-MEDIA

Cross-media or transmedia production has suffered somewhat over the last few years, in part because it was oversold by some of the early advocates and because there were too many weak products.

Big claims need to be backed up by results but some of those early issues, of weak infrastructure, immaturity of technologies and lack of awareness have been addressed.

Emmy-nominated producer and cross-media storyteller Nuno Bernardo agrees: "People don't talk about transmedia any more because it is natural."

"Name me any big Hollywood movie these days that does not also feature a transmedia experience. They might call it marketing, or new media, or digital, but they will be employing people to look at how to expand the brand to different platforms."²⁰⁶

There are now frequently cross-media extensions, new kinds of IP and imaginative multi-platform experiences in many projects.

In theory, crossing media ought to be a valuable tool for film diversity. It allows film-makers to target audiences in the places where they actually consume media and it puts audience interaction at the heart of the model.

Many film bodies and agencies have been increasing their cross-media support. Among the most active European backers have been Arte and the Belgian regional agency Wallimage.²⁰⁷ In 2014, it announced the creation of a joint incentive²⁰⁸ with the Canada Media Fund to support co-development and co-production of cross-media projects.

Among other established cross-media funds is the **Torino Film Lab**²⁰⁹ and distribution fund: "supporting innovative audience development strategies at the moment of distribution", while **Power to the Pixel**, now in its tenth year, has a firmly established cross-media co-production market.²¹⁰

There are established training courses and festival sections dedicated to cross-media work. It is becoming an established fact of life for the net-native generation in particular. Diversity may prove to be the issue that begins to fulfill its early promise.

GRASSROOTS FILM-MAKING

Francis Ford Coppola, in the 1991 documentary *Hearts Of Darkness: A Film-makers Apocalypse* captures the idea in talking about easy access to cheap video cameras:

"To me, the great hope is that now these little 8mm video recorders and stuff have come out, and some... just people who normally wouldn't make movies are going to be making them. And you know, suddenly, one day some little fat girl in Ohio is going to be the new Mozart, you know, and make a beautiful film with her little father's camera recorder.

And for once, the so-called professionalism about movies will be destroyed, forever. And it will really become an art form."²¹¹

The arrival of the Internet and the commoditisation of high definition video-making tools, alongside the free means of distribution through YouTube and other channels, means that the would-be Mozart is no longer reliant on parental permission. (The fact that Coppola should highlight a "fat girl" as a breakthrough, and that it is "dad" who owns the camera is indicative of dominant thinking of the time).

Many young people have taken the opportunity to make films online, some of them making significant money and building huge audiences. But Mozart is known today because he had the support of patrons and the film industry still defines professional success.

Eight months after the launch of YouTube it was already getting 100 million views a day. Within eight years, 300 hours of video were being uploaded every minute.²¹²

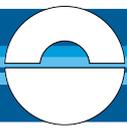
The bulk of those videos are shared, often illegally shared, material, or snippets of personal material posted for a tiny number of friends.

That reputation is comforting for the audiovisual professional. (One comedian memorably claimed that the biggest achievement of the Internet was to give short men access to top-shelf pornography.)

But online video has become serious business.

YouTube introduced new channels in 2011, which began to create serious revenues for an admittedly relatively small number of previously unknown 'stars.' These new players, with huge audiences, were not motivated by (and mostly remain uninterested in) careers in the mainstream of film and media.

What they proved is that cheap access to the means of production, and cheap and free means of distribution and audience building, has considerably lowered the bar for film-making.



8. PRACTICES AND PROCESSES

For the first time in film history, there is a genuine opportunity for a huge and dynamic grassroots sector.

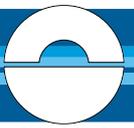
Harvard Law Professor Lawrence Lessig, told the World Summit on the Information Society that "for the first time in a millennium, we have a technology to equalise the opportunity to access and participate in the construction of knowledge and culture, regardless of their geographic placing."²¹³

Participation has been a growing theme in arts funding more widely. The Dutch launched a **Cultural Participation** fund in 2008, specifically to encourage citizens to express themselves.

Grassroots activity is even more established in sports.

The vast majority of people will make rudimentary films that will never be more than a hobby, just as the mass of women and men kicking around a football, or knocking around a tennis ball will never lift the European Cup or play at Roland Garros.

But sports has understood the value of the grassroots in terms of building and sustaining interest in the professional game.



9. CONTENT

- On-screen representation has a knock-on effect, not just to audiences but to engagement with film and the industry more widely.
- Globalisation and perceptions of international markets are putting pressure on selections of stories and talent.
- On-screen quotas, demanding 'positive' images of diverse groups are challenging, others simply believe the key is to empower new voices.
- There are major gaps in infrastructure and commissioning that have held back the making of films for some audience demographics.

IN BRIEF

Film likes to think it is on home ground when it comes to the diversity of content. There has been a dramatic expansion in the number of films produced in the continent over the last decade, covering a growing range of genres, styles and themes.

Most national and regional film agencies make considerable effort to ensure diversity in terms of the breadth of styles and genres they support. (See below)

The film industry has been among the most vocal lobbies in favour of cultural diversity (See p. 19) as a bulwark against the domination of Hollywood and the global market more generally.

The contrast with Hollywood has come to define what is meant by European film. It is not driven by commercial imperatives and short-term demand.

It does not have to join what is often perceived as a race to the bottom, in creating generic content that will appeal to uptown Shanghai as much as it does downtown Seattle.

In reality, there is no opportunity to compete with CGI-made mega-franchises backed by tens of millions in marketing budgets, even if the will was there.

Most European cinema sees itself less as escapism, and more, to borrow Godard's memorable line, "truth at 24 frames a second."²¹⁵

But the diversity issue has raised an inevitable question: Whose truth?

It is not a new issue for film. Truffaut may not have used the exact words commonly attributed to him, but the *nouvelle vague* was an explicit rejection of the "cinema de papa."

The "*tradition de qualité*,"²¹⁶ he excoriated back in 1954, gave way to the auteur-driven cinema that is the essence of what is commonly called the European tradition.

The content question is whether that auteur cinema tradition has itself now become the new cinema de papa (with maman hardly getting a look in).

European cinema is struggling to appeal to young and working class people, or large sections of a variety of BAME populations.

Research is weak on alienation of younger and poorer audiences, in part because the goalposts move so quickly. Studies on the use of media among children and teenagers change dramatically from year to year.

But there are identifiable barriers that are common in research. A study in the North of England in 2013, for example, found that teenagers did not go to arthouse cinemas partly because they perceived them to be places only attended by "old people" and student "hipsters."²¹⁷

Among other key issues was **price**, which not only stopped visits to the cinema, but also led to more conservative choices of film when they did go.

There are other causes too: the fragmentation of media, the vast increase in choice of alternative pursuits, market failure, weaknesses in distribution, price ... It is probably a combination of all of the above but how far is it a question of the content itself?

And more to the point, will changing the diversity of film-makers, change anything for audiences?

Very few people from those members of under-represented groups who aspire to careers in film argue that the art form itself is a problem.

For most, the issue is one of access to opportunities – older white men are getting the lead creative roles that younger, BAME and female film-makers would like but to which they seem to be excluded.

In that case, diversity is more about employment than cultural form. Perhaps, that is inevitable, given that the first priority of a significant number of well-qualified but frustrated film-makers is to be given a chance to succeed according to today's rules.

"Women are as invisible in the cultural sector as in other fields, and are often kept away from the most prestigious positions," suggests a report from Laboratoire de l'Egalité for media giant Vivendi.²¹⁸

But the authors go on to say that there are two important issues: "that of an ethic of equality and justice between men and women, and that of the adverse consequences that the marginalization of women has on art".

Will more women making film, for example, change the nature of the content? And what effect would that have on audiences?



There is a downward spiral in the industry that has not been adequately researched, and for which policy is weak. Working class young people don't go to independent cinemas, so film-makers don't make films for them; which makes it even less likely that they will go ...

It seems unlikely that Video On Demand services on the platforms those youngsters use will create demand, because the pattern has already been established that European film is for older, educated, white audiences.

Removing barriers and building bridges in the case of poorer young audiences is a broad discussion but there are good reasons to focus on the kind of content being made, as well as distribution.

In particular, there needs to be more research into how on-screen representation affects audiences.

One of the most helpful catalysts in that respect has been the **Bechdel Test**,²¹⁹ named after US feminist cartoonist Alison Bechdel. A character in one of her graphic novels in the 1980s, suggested that she only watched film that passed three tests:

1. It has to have at least two (preferably named) women
2. Speaking to each other
3. About something other than a man

It has inspired considerable discussion in Europe, not least because of the shock of finding how many films fail the test.

Despite the hype, research suggests that the number of films passing in 2014 was lower than previous years, at 55.4%. European films generally beat the average (61.9% in France and 61.5% in the UK).²²⁰

The value of the Bechdel Test may be in the fact that it is such a blunt instrument, measuring just one thing: a basic every day form of human interaction that takes place between the majority of the population every single day.

There are alternatives to the focus on quotas and production. One of the most interesting is the application of **new certification** that offers the audience the option of judging the diversity of a film.

A group of Swedish independent cinemas has introduced an 'A' rating to screenings, alongside the official certification based on age,²²¹ showing whether a film has passed the Bechdel Test. (See above)

Simple certification allows informed audiences to make their own judgments on the diversity of a film – it may be the cinema equivalent of the **'free trade' labels** on food. Consumer pressure on the market might have a significant impact on the content made.

GLOBALISATION

While US hegemony is routinely cast as the enemy of cultural diversity, the target should really be globalisation. Hollywood's franchise films are increasingly targeting international markets and in particular attention on the emerging giant of China.

In 2014, all of the key established franchises made more money internationally²²² than they did in the US market, with some, including the latest instalments of *Transformers*, *the Hobbit*, and *The Planet Of The Apes*, taking more than 70% of their revenues outside North America.

Even *Captain America: The Winter Soldier*²²³ took 63.7% outside the country he is sworn to protect.

The culture of Hollywood film has increasingly been built on scale and spectacle, and simple stories that are designed to travel. It has been redefining the cinema experience and creating a growing gulf between the franchises and the rest of the cinematic world.

Its impact on the cinema is also strongly related to the size of the marketing budgets, which make Hollywood films among the most recognisable global brands during their runs in theatres.

Even in a bad 2014 for Hollywood blockbusters in the EU, with market share falling to 63.1%²²⁴, 21 of the top 25 films in Europe were also in the US domestic top 30.²²⁵ Nonetheless, Europe can normally count on a handful of really big international successes each year.

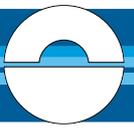
In 2014, for example, the French comedy *Qu'est-ce qu'on a fait au Bon Dieu* was the fifth best performing film at European box offices, while *Lucy*, Luc Besson's English language sci-fi, starring Scarlett Johansson was sixth²²⁶, and the 24th highest-grossing film worldwide.²²⁷ (*Lucy* represents a trend in European English language films aimed squarely at the global market.)

Those European film-makers who make a mark in international markets are frequently snapped up by Hollywood to direct franchise films.

Recent examples include Iceland's Baltasar Kormákur (*Everest*); the UK's David Slade (*The Twilight Saga: Eclipse*) and Matthew Vaughn (*X-Men: First Class*); German Robert Schwentke (*Insurgent*) and Norwegians Joachim Rønning and Espen Sandberg, who will direct the next film in the *Pirates Of The Caribbean* franchise.

European talent has rarely been more in demand in Hollywood, with event television series helping increase exposure.²²⁸

The need for a powerful commercial sector, able to compete on the global stage, and essential to diversity of content in Europe is discussed in Chapter 8.



From a content perspective, however, there is a more difficult question: How far does success in this globalised industry come at the expense of diversity?

It is becoming increasingly clear that the perceived appetites of international markets are a critical influence on the story and choice of talent. And that is not good news for on-screen diversity.

Ridley Scott courted controversy in suggesting he had no choice but to cast white actors for his film *Exodus: Gods and Kings*.²²⁹

"I can't mount a film of this budget, where I have to rely on tax rebates in Spain, and say that my lead actor is Mohammad so-and-so from such-and-such. I'm just not going to get it financed. So the question doesn't even come up."

But the concern that global market economics trump diversity is widely held.

Saving Mr Banks producer Alison Owen has claimed that diversity in UK drama is being hampered by the increasingly international nature of the genre.

Owen, managing director of Ruby Film and Television, said she had seen on screen diversity "get better and then get worse" in recent years, highlighting attitudes in other nations as a barrier.²³⁰

"When I started in the industry, funding was very much domestic from the UK," she explained. "But what's really difficult is if you're trying to raise money for something and you're raising for an international market. Try selling something to Italy with black people starring in it, try selling something to Asia with women in it. It's really hard".

Owen added that it was "dispiriting" as she had "fought so hard" for women and ethnic minorities "only to see that bit eaten away as international sales form so much of the funding these days".

A leaked email from a Sony Pictures executive in 2014 warned that casting Denzel Washington in a film had become risky because he believed "the international motion picture audience is racist - in general pictures with an African American lead don't play well overseas".²³¹

The conservatism in choice of talent may underestimate the fluid nature of demand. Assumptions based on the reaction to a film in 2015 will not necessarily be true for a film being made now that will be released in 2019.

Tastes and social mores change.

In 2015, there has been a number of examples of films with women in strong lead roles enjoying box-office success: including *Insurgent*, *Cinderella*, and *50 Shades Of Grey* (60% of whose audience was estimated to be female.)

50 Shades, which has taken more than half a billion dollars world-wide²³², was directed by a UK woman, Sam Taylor-Johnson, adapted from the novel by UK female author E. L. James. (All three films incidentally were directed by Europeans).

The head of the US National Association of Theatre Owners (NATO), John Fithian, has gone so far as to call 2015 "The Year Of Women."²³³

The reason for change comes down to simple market economics. Data has demonstrated that films with strong female characters and relatable stories perform more strongly those without.

A study of more than 1,600 films between 1990 and 2013 by the renowned statistician Nate Silver's FiveThirtyEight company²³⁴ found that films that passed the Bechdel Test outperformed or equalled those with more perfunctory female roles in the US domestic and international markets.

But the research also revealed that the average budget for a Bechdel passing film lagged behind those that did not (\$31.7m against \$56.6m for films in which no female characters spoke to each other and \$43.4m for those with fewer than two women).

The implication is that blockbuster films remain a man's world, and that stereotyping is still strong, partly explaining the shortage of leading creative roles for women. So the market is slowly catching up with the realities of life within certain still fixed parameters.

A study by the University of Southern California, for example, estimated that the 31.6% of women in the Hollywood films they studied in 2012 were dressed in "sexy" attire.²³⁵

The road to enlightenment is long, though there has been pressure for change.

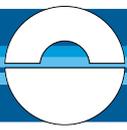
There are increasingly powerful lobbies in the US, campaigning about diversity in front and behind the camera, while the BFI in the UK has linked 'positive' on-screen representation of women and minority groups to access to public finance. (See p. 34)

Demands for on-screen representation are difficult to enforce and inevitably raise questions about freedom of expression.

The desire to see more films centred on women, or working class people, or people from ethnic minorities does not mean that there is no validity in films that tell stories that only involve men.

Even Alison Bechdel acknowledges that she enjoys films that do not pass it. "I'm not a stickler about the Test. If I were, I wouldn't see many movies."²³⁶

It is a question of balance, not control.



NEW VOICES AND TARGETED FILMS

Diversity of content in film might better be achieved by concentrating on diversity of film-makers and that is a deep and long-term commitment. While there are immediate measures that can be taken to improve the access of qualified women to senior creative positions, the bigger issue is creating a pipeline of talent from which to choose.

Ministers from Council of Europe member states issued a '**Declaration on gender equality**' in 2015,²³⁷ which made commitments to very practical measures, including training, mentoring and better equality data.

While the statement encourages film-makers to be "more sensitive to on-screen female representation," the overall thrust of the report is that who gets to call the shots behind the camera is the essential issue.

San Diego State University and leading researcher in the field, Professor Martha Lauzen said: "Films with women directors tend to employ greater numbers of women writers, editors, and cinematographers. The dearth of women working behind the scenes is related to the under-representation of females on screen," she said.²³⁸ The diversity problem is more the shortage of women than the oversupply of men, or the domination of a masculine culture.

That shortage is acute in many areas: Céline Sciamma²³⁹, the director of *Girlhood (Bande de filles)*²⁴⁰ said she was forced to cast unknown actors from the streets to play the BAME women from *banlieus* in the film because "the drama schools were empty, the theatre and acting classes were nearly all white," she says.²⁴¹

One of the stars of the film Karidja Touré, who is of Senegalese descent said there was a shortage of stories and talent: "When you look at cinema and the luxury market in France, you only see white faces – as if that's all there is. It's hard for everyone else, and it's totally inaccurate."²⁴²

Addressing those issues requires a series of actions in different areas of business and policy, including research, education and training but it also needs a focus on building demand in communities do not instinctively feel part of the European film tradition.

Content gaps

It is possible to support the finding and development of that talent by concentrating funding on films that directly target specific, and under-represented, or under-served, sections of society.

One gaping hole in a European industry obsessed by attracting young audiences has been **live-action film made for young people**.

Back in 2008, a study showed that, while 15.7% of the EU population was under-15 years of age, just 3.4% of titles were aimed specifically

at that market. It inspired the creation of what became known as **The Erfurt Declaration**.²⁴³

The authors, from across the European industry said: "Children are the audience of tomorrow: if they don't have the possibility to become familiar with the full variety of genres, subjects and styles, it is unlikely that they will develop a taste for this variety as adults."

Where films have been successful, they have tended to be based on already successful English language books, such as *Harry Potter*, *Chronicles of Narnia*, etc.

The declaration suggested that there was a barrier to European films aimed at young Europeans made in their own languages: "Market pressure suppresses a sufficient national and especially international exploitation of these films and hence impairs conditions for financing and developing."

The deficiency inspired the creation of **Kids Regio**²⁴⁴, which has been lobbying for greater emphasis on young audiences, and supporting films through production and co-production. The initiative was launched in 2008, led by CineRegio member Mitteldeutsche Medienförderung (MDM), in cooperation with **Kids Financing Forum** Malmö and Film i Skåne.

Kids Regio has recognised two critical factors in the creation of a diverse film culture for children: creating films that are relevant with the way that young people live today and ensuring that those films find their way to market through the media that young people use.²⁴⁵

Getting to audiences

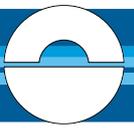
In 2015, Film i Väst, Swedish Television and the Swedish Film Institute (SFI) launched **Bombay Basic** in 2015 with production company Copenhagen Bombay, to produce two theatrically-released features per year specifically aimed at the youth market.²⁴⁶

An important part of the initiative is that the partners are committed to supporting marketing for the films. That commitment is essential because opportunities for untested new talent to reach large audiences have always been scarce but there are fears that the bar has been raised today to virtually impossible new heights.

The theatrical market is oversupplied with content, and not just films. 'Event cinema' screenings of live theatre and operas, and beautifully restored works from the back catalogue have been added to programmes.

The box office is dominated around the world by films that have a pre-existing audience recognition.

Sequels, remakes, adaptations, spin-offs and star vehicles are not just important for Hollywood.



It is not simply a matter of a taste for Hollywood films, there is also a clear trend towards work that already has a degree of public recognition.

Ten of the top 25 films at the EU box office in 2014 were sequels to established franchises; and another 10 are adaptations of more or less familiar books, games, or existing film characters.

Many of the European hits are also remakes, sequels or adaptations, including the Swedish comedy *The Hundred Year Old Man Who Climbed Out Of The Window And Disappeared*, adapted from a hit novel; *The Inbetweeners 2*, the second movie spin-off of a popular UK TV comedy; and *The Physician*, based on a German bestselling book.

With a scarcity of cinema screening time, the first stop for the up-and-coming first timer has long been television. But that avenue is also becoming more difficult; television audiences have been fragmenting, meaning new talent, if it gets any time, is likely to be relegated to specialist channels and on-demand sites, where the numbers are low.

There are exceptions, such as Germany's *Das kleine Fernsehspiel*²⁴⁷, which has become a national treasure, screening new works from unknown young German and international talent since the 1960s.

LANGUAGE

Linguistic diversity is right at the centre of the UNESCO definition of 'cultural diversity'.²⁴⁸ The number of official languages recognised in Europe and a wealth of regional minority languages, is what makes it distinctive. Uniting a multilingual continent into a working community is one of the great achievements of the EU.

It also represents a challenge. Clearly the languages of more populous nations in Europe (which have been spread worldwide through dubious imperial history) have an advantage over those of small nations.

The English language has the biggest advantage of all, not only easing export to North America but also helping distribution in European markets, which are routinely exposed to Hollywood films and US and UK television.

The economics of English are becoming stronger with the emergence of new markets, notably China, where there are an estimated 400 million people learning English.²⁴⁹

In recent years, there has been an upturn in the number of non-English directors making English language films.

Among the top-10 EU-made films in European markets in 2014, were French director Luc Besson's *Lucy*, starring Scarlett Johansson and German Philipp Stölzl's *The Physician*, starring Tom Payne. At the Cannes Film Festival in 2015, more than half of Competition entries were in English, but only three were made by native English speakers.²⁵⁰

There is an argument that **English-language** film helps increase the diversity of the audience. A 2006 survey²⁵¹ suggested that English might have a reach of more than half the EU population (13% native speakers and 38% working knowledge to fluency).

By contrast, subtitled films in any language other than English are often assumed to be artistic or cultural, even if they are actually following mainstream themes. The increased use of English is one of those areas where audience demand and economic realities might have a serious long-term effect on cultural diversity.

There are safeguards in many countries, through **rules and quotas** on the proportion of foreign-language cultural content being shown to citizens and they are firmly protective of the language.

Nonetheless, even in France that takes protecting the language extremely seriously, economic realities may bite. Radio stations in France have been calling for an end to the 40% quota of French-language music they have to play, because so many new artists are choosing to write and sing in the more exportable English language.

The diversity of languages, however, is fragile and film and television production is generally seen as an essential means of keeping them alive.

The language question is particularly sensitive where it involves minority languages, such as Catalan and Basque in Spain, which are tied up with strong regional identities and politics.

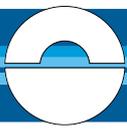
But in others, the support is weaker. There is no mention, for example, of the Welsh language (spoken by 562,000 people in Wales) in the British Film Institute's diversity scheme.²⁵² As with some other minority languages, the main pocket of first-language speakers is in the most economically and culturally-deprived part of the country.

Diversity policy is often made by bodies based in the richest parts of Europe, which might be considered a problem in itself. (Central London tops the list of the richest areas of Europe, Brussels is third).²⁵³

The language question is relevant to diversity challenge, given the high levels of immigration in recent years. In the UK, for example, there has always been a strong market for Hindi language Bollywood films. But new languages are also now demanding attention.

The wave of EU immigration to the UK means that in 2013 there were almost as many native Polish speakers²⁵⁴ as speakers of Welsh, easily the biggest of native minority languages.²⁵⁵

The free movement of EU citizens is likely to accelerate demands that they have free access to content from their home countries – one of the factors that has inspired plans for a borderless Digital Single Market. (See p. 55)



Subtitles

Subtitles are a mixed blessing for diversity.

Advocates suggest they have multiple benefits. A report on European film in the digital era by MEP Bogdan Wenta²⁵⁶ identifies subtitles as a crucial tool for increasing diversity; improving cross-border circulation and improving "awareness of Europe's cultural and linguistic diversity amongst viewers...and mutual understanding."

Digital technologies make subtitling a relatively simple, even DIY task: There are dozens of YouTube tutorials that can walk through subtitle creation in a couple of minutes.²⁵⁷

One major European initiative is the **Lux Prize**,²⁵⁸ introduced in 2007. The winner is selected by members of the European Parliament and the prize includes support for subtitling in all the official EU languages.

The pros of subtitling in terms of diversity are strong, including that:

- It is much cheaper than dubbing.
- It allows viewers to hear the original language.
- It promotes linguistic diversity.

But there are arguments against too:

- Subtitles turn a visual form into a written one. (Sir Alfred Hitchcock warned that subtitles meant that audiences were only watching half a film: "If it's a good movie, the sound could go off and the audience would still have a perfectly clear idea of what was going on".²⁵⁹)
- It distracts from the cinema experience, which may turn away audiences.
- Any film with subtitles, however mainstream, generally ends up saddled with an arthouse label, which in turn can turn off young audiences.

After watching foreign-language film for some time, most arthouse film fans develop techniques for reading subtitles and watching images. One of the deep issues for European film, however, is that the most mainstream film becomes 'arthouse' once the subtitles are attached, making it difficult to attract the young and the uninitiated.

CELEBRATING DIVERSITY

Among the simplest and most effective ways of making diverse content visible is to celebrate it. Awards and prizes have always held an important place in the European film industry and can have considerable benefits in terms of audience reach.

But as already mentioned (p. 29), the biggest and most prestigious festival awards have been thoroughly dominated by men.

Prizes specifically dedicated to film-makers from particular social groups can meet resistance, running directly into the ever-present fear of 'tokenism' (See p. 32).

That resistance is not universally applied. Prizes for best actor and best actress are entirely accepted. No one questions awards given to film-makers from individual countries – such as the Best British film at the BAFTAs.²⁶⁰

The issues arise when it comes to directors and the leading creative roles.

Film is not alone. Novelist Nicola Griffiths did research into the main literary prizes and found the list of winners was overwhelmingly dominated by male writers and by stories about men and boys. Where women won prizes, they often had a male central character.²⁶¹

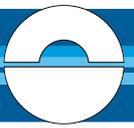
Some see dedicated prizes for women as an essential means for breaking out of established expectations for awards – and, ironically, of *not* being judged as a woman.

Eimear McBride, winner of the prestigious Baileys Women's Prize For Fiction in 2014 said: "Part of the pleasure of being on last year's Baileys short-list was the relief of being able to just talk about my work rather than being continually obliged to quantify the relationship of my gender to my work and vice versa. Until that experience becomes as *passé* for female writers as it is for male ones, the need for female-only awards will remain".

There are established awards dedicated to under-represented groups that can make an impact in the wider film world.

A number of festivals, dedicated to films made by women, award prizes (See p. 54 for more), while there are a small group of influential international awards that have achieved prominence, including the Women In Film **Crystal + Lucy** awards.

There are a number of awards dedicated to films with LGBT themes, for example, including: **The Teddy Award**²⁶² an official prize at the Berlin Film Festival; the **Queer Palm**²⁶³, an unofficial prize at the Cannes Film Festival; and the **IRIS Prize**²⁶⁴ for short films.



10. AUDIENCES

IN BRIEF

- The audience is the missing link in an industry diversity debate suffering from serious knowledge gaps and systemic business and cultural issues.
- New schemes are testing potential to increase audience reach through new release models.
- VOD promises anytime, anywhere access but it is far better at demand exploitation than demand creation.
- Geography is often a critical factor in whether there is access to film, and opportunities within the industry.

The diversity debate is another facet of the biggest challenge for film in a digital age: How to accommodate changing demand with sustainable business models.

As previous reports in this CineRegio series²⁶⁵ have pointed out, the producer is divided from audience by an elongated value chain of specialised businesses in sales, distribution, marketing and exhibition.

Film-makers and producers are generally armed with only rudimentary data; and analysis of their potential market and heavily reliant on gut instinct.

The 'hit and hope' approach is increasingly ineffective, given the rapid changes in consumption patterns in the media, and the long process of creating a film.

As Chapter 4 argued, it is impossible to create effective strategy to improve the diversity of either production or audience without much greater commitment to collecting, analysing and sharing data.

The lack of transparency from Video On Demand services (See p. 24) is a serious hole in the knowledge base of European film and deserves much greater attention.

The belief that diversity is a data issue is not universally shared. Indeed, for some, 'connecting' with audiences is at best a compromise and at worst surrender to the market.

There are legitimate questions about the emphasis on the audience in the industry in recent years, particularly when discussion is so often ill informed, unimaginative and with only the vaguest of objectives.

The argument of this report, however, is that there are a number of clear reasons why the debate about diversity in production must be more clearly linked to the one about diversity of audiences and why it is essential to create policies and practices that address the realities of audience demand and behaviour in a digital age:

- If European film cannot engage young people, it will have no future.
- Film will have to compete for time and public money with a range of alternative media and cultural forms, which are native to, or seizing the opportunities provided by, digital technologies. It can lose.

- European film needs to build demand among a broader audience base to match the more diverse productions that it is championing.

DISTRIBUTION WEAKNESSES

Film distribution in Europe has major flaws. It may have (sometimes enthusiastically) adopted new digital technologies, particularly in terms of marketing but its basic business model is a hangover from the analogue age.

The problems seem obvious:

Distribution is based on territorial rights, when the Internet has no borders; and it is still strongly dependent on theatrical release, and even on newspaper critics (albeit now also available online and social media).

And the vast majority of independent and arthouse cinemas are in big cities and university towns,²⁶⁶ with major gaps in rural and economically disadvantaged areas but European films, and particularly non-national EU films, are hugely reliant on them.

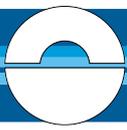
Members of the **Europa Cinemas** independent cinema network – incentivised by financial incentives from the European Commission – are responsible for a large percentage of non-national European screenings and admissions. Research in 2015 showed that nearly 36% of screenings in the network of 977 cinemas in 42 countries were of non-national European film.²⁶⁷

The success of Polish auteur Pawel Pawlikowski's *Ida* in 2014 owed much to the network, for example, with 80% of admissions in Italy, 61% in Spain and 40% in France coming from Europa Cinemas members.

Europa Cinemas, and other national initiatives, such as the UK Film Audience Network, screening programmes have been able to ensure that a wider diversity of films is shown in cinemas.

But arthouse cinema, however, has a long-established demographic problem, particularly in attracting interest from young audiences and those from poorer socio-economic groups.

And the theatrical business model is strongly tied to having a protected window in which only cinemas can show films. Pirates have thoroughly



10. AUDIENCES

imposed themselves on the gap between releases on different platforms.

People outside the catchment areas of cinemas are expected to wait until the theatrical window has closed and the film is available on another platform.

The closure of video stores and the general marginalisation of European film on the terrestrial and public service broadcast channels have further restricted access to film.

Even then, access to European film is dependent on a distributor deciding to purchase a film for a particular territory. Neelie Kroes, then European Commissioner for Digital Economy and Society talked of "digital Berlin Walls."²⁶⁸

The digital economy offers a means to increase access to film by removing barriers, such as the time between cinema release and other platforms, and artificial attempts to recreate national boundaries online, such as geo-blocking.²⁶⁹

Attempts at industry, national and European Commission level to reform the practices of industry and policy in areas, such as film policy, have explicitly done so in the name of diversity.

Initiatives include:

- The **Digital Single Market**: See p. 55
- The **Tide Experiment**: An all-platforms simultaneous release scheme.²⁷⁰
- **Spide**: A project experimenting in new release models.²⁷¹
- **BFI New Models Fund**: A scheme testing innovative distribution processes.²⁷²
- **Streams** Day-and-date experimentation.²⁷³

ON DEMAND

Video On-Demand (VOD) platforms have been among the most enthusiastic supporters of these new digital models.

Rather than being tied to physical spaces, such as cinemas, or video stores, these services seem to offer free access to all, without the restrictions of national borders, programming schedules or single platforms.

Consumer demand for easy and ubiquitous access to content seemed to have been proved by the success of file-sharing sites, illegally enabling consumers see whatever films they wanted very soon after cinema release.

And so, Video On Demand (VOD), in its various forms (subscription, transactional, etc.) seemed to offer a legitimate means of building audiences.

What's more, online platforms might offer an outlet for those films that could not make an impact in an over-supplied theatrical market to reach audiences.

There is a compelling logic to the enthusiasm for on-demand services in Europe. Policy-makers, including the architects of a proposed Digital Single Market plan (See p. 55), believe that film, and the media more widely, needs to tear down the walls of analogue practice and to embrace the realities of consumer demand.

The plans poses a threat to the industry business model but there are other concerns about the development of VOD, and the impact it might have on audience, and indeed content diversity.

The first is the domination of global services, with little or no interest in European films, and a pragmatic, rather than passionate interest in film.

The services are increasingly committed to creating their own distinct programming that separates them from rivals and becomes their main selling point to subscribers. In 2015, Netflix announced it was dropping thousands of film titles from its services, ending a \$1bn deal with US distributor Epix.²⁷⁴

The SVOD services are commissioning some new cinema content. Veteran indie producer Ted Hope was recruited to head a new feature film production department at Amazon Prime in 2015.²⁷⁵

But the emphasis of on-demand services has been overwhelmingly on television series, where they have enjoyed considerable success. At the 2015 Emmy Awards, Netflix picked up 34 nominations, and there were 12 for its rival Amazon.²⁷⁶

MOBILISING AUDIENCES

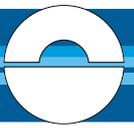
Nowhere is the difference between removing barriers and building bridges more apparent than in the circulation of European films.

While it is tempting to see the diversity debate in terms of unstoppable audience demand on one side versus a protectionist industry on the other, the truth is much more nuanced.

Demand is not a fixed commodity and consumers can be downright contradictory in their desires. Different demographic groups are deeply divided in their use of technologies.

Demand is something to be won and earned.

While cinema may be perceived as a weak link in an anytime, anyplace, anywhere economy, it remains the pre-eminent means of creating demand that is exploited by other format (see p. 29), not least on-demand services.



10. AUDIENCES

Cinema cannot be written off as an over-demanding and antiquated part of an analogue value chain: it has a significant place in the Experience Economy²⁷⁷ – the theory that in an age of ubiquitous media and an interactive, always-on mobile culture, the value of authentic, unique experiences increases.

That advantage needs to be coupled with other factors, such as early-stage audience development and much better use of social media and data tools.

But mobilising communities of interest is becoming essential to the diversity issue, and there has been plenty of movement:

D-cinemas

The digitisation of cinema ought to be among the greatest diversity bonuses for film. So far the most lucrative change has been the rise of event cinema (opera and theatre) and new blockbuster formats, including 3D.

There have clearer benefits for European diversity, including the opening of new cinemas, particularly in New Europe; and there has been a major counter-factual benefit in the assumption that if the conversion to D-cinema had not happened or had been botched, then it is likely that the sector would now be in serious decline.

There have been barriers to the D-Cinema promise, however. The potential for satellite and cable networking, allowing cinemas to be responsive to audience demand has been held back by the lack of infrastructure, the VPF payment model for cinema conversions, shared with distributors; and, arguably by rules of windows and territorial sales.

Potentially, cinemas may be able to pursue more participative schemes, such as Cinema On Demand, which has been pioneered by services, including We Want Cinema²⁷⁸ and La Septieme Salle.²⁷⁹

Cinema VOD services

Cinemas are a rarity in the film industry in having a recognisable consumer brand and the ability to build audience loyalty. Local demand is why most film revenues now come from cinemas, rather than later home entertainment sales.

Logically, cinemas are well placed to become the providers of VOD services, rather than creating demand and loyalty that is exploited solely by on-demand platforms.

Some European film businesses, combining distribution and exhibition, have set up VOD services of their own, including Curzon and **Curzon Home Cinema** in the UK.²⁸⁰ Curzon has been active in testing new forms of release, including Premium (day-and-date VOD), hoping to extend audience reach.

Cinema brands, outside the major multiplexes, are effective only in those areas where they operate. The evidence of studies of simultaneous theatrical and VOD release do not yet suggest really significant reach outside a core local market.

Experience

Changing the context of any cultural form can have a significant impact on how it is perceived by audiences.

In particular, scaling up a performance, or shifting it to an unusual location can attract new audiences. Opera and theatre have been leaders in the field of **Event Cinema**, ironically using cinema as a means to create a concert-hall-esque experience for audiences.

Research from IHS for the Event Cinema Association suggests that the alternative content sector may be worth \$1bn in revenues by 2019.²⁸¹

But the initial impetus was preservation. Iván Fischer, conductor of the Budapest Festival Orchestra said he feared that symphony orchestras were like “dinosaurs” heading for extinction unless they were able to adapt to demand.²⁸²

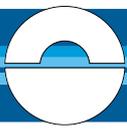
While less pessimistic, the conductor of the influential Bournemouth Symphony Orchestra, Kirill Karabits, suggested “Symphony orchestras nowadays should, as never before, be aiming to serve all parts of their society and constantly thinking about reaching new audiences within their cities and regions”, he said.

Opera and theatres have broken free of the physical restraint of the stage to reach new audiences through cinema screens, while museums have been adopting new technologies to find ways to engage new audiences.

There is little evidence that opera in cinemas is able to create new converts to the art form but there is a belief among opera companies that it reaches those who, for geographic or economic reasons, would otherwise be excluded.

And it offers a unique experience. Alex Beard, CEO of the Royal Opera House said: “It’s emphatically not a substitute for being there, when the atoms the singers are expelling enter your ears, but it is another way in to these remarkable art forms. You can see it in the interval tweets, in the social media: you really get a sense of being part of an extraordinary moment.”²⁸³

In film, the pre-eminent example of the Experience Economy on the move is the film festival. Some arthouse festivals, particularly city events, can create broad audiences for challenging film from within their own communities. The challenge is to extend their impact in terms of geography, demographics and time.



10. AUDIENCES

Some approaches include:

Festival outreach

The logic of audience extension most obviously applies to film festivals, which create buzz around the film, which then dissipates over the long period of sales, distribution and theatrical release. Even a film in the most prestigious competitions, such as Cannes, may take months to break into cinema markets.

So the life of an acclaimed European film is generally forced into a pattern with proven weaknesses in reaching beyond the core, older cinephile demographic: appearing briefly in a festival before a short life much later in arthouse cinemas.

One answer that has been taken seriously by festivals is to try to broaden the reach of events without watering down the content.

The BFI London Film Festival head Clare Stewart, for example, introduced a new system of “**thematic labels**” to encourage audiences outside hardcore fans to watch a film without being turned off by the arthouse label.²⁸⁴ Different sections have been given titles, such as Love, Thrill and Cult.

Others have taken their work on tour. **Sheffield Doc Fest**, for example has established a partnership with a leading rock festival, Latitude.²⁸⁵

The International Film Festival Rotterdam has been a leader in trying to build a sense of event around films playing in competition: **IFFR Live!**²⁸⁶ offered a small number of titles playing in its competition to participating cinemas around the world. It was a limited initial experiment but has promise.

IFFR have also been offering competition title the opportunity to take control of its VOD release through an initiative called **Tiger Release**.²⁸⁷

Specialised festivals

The marginalisation of films from under-represented groups has led to the creation of new festivals, dedicated to specific groups.

The **International Women’s Film Festival Network**²⁸⁸ has 13 European members: **International Women’s Film Festival, Barcelona**²⁸⁹; the **Women’s Worlds** festival (Germany)²⁹⁰; **Créteil International Women’s Film Festival** (France)²⁹¹; the **Underwire Festival** (UK)²⁹²; **Women’s Short Film Festival**²⁹³; the **Berlin Lesbian Film Festival**²⁹⁴; the **Tricky Women** festival (Austria)²⁹⁵; **Sguardialtrove** (Italy)²⁹⁶; **Laboratorio Immagine Donna** (Italy)²⁹⁷; **Elles Tournent – Dames Draaien Festival** (Belgium)²⁹⁸; **Dortmund|Cologne International Women’s Film Festival** (Germany)²⁹⁹; **International Film Festival Assen** (Netherlands)³⁰⁰; **Arab Women’s Film Festival** (Netherlands).³⁰¹

In 2015, actress and campaigner Geena Davis launched a **Women And Diversity in Film Festival** in Bentonville, Arkansas.³⁰²

A number of European festivals are dedicated to children’s film festivals including: the Copenhagen-based **Buster Film Festival** (Denmark)³⁰³; **Lucas – International Children’s Film Festival** (Germany)³⁰⁴; **Vienna International Children’s Film Festival** (Austria)³⁰⁵; and **BUFF – International Children and Youth Film Festival** (Sweden).³⁰⁶

There are also dozens of festivals dedicated to LGBT films and film-makers.³⁰⁷

Community and pop-up cinema

The low cost of projection equipment and new forms of distribution has been fuelling growth in cinemas going out to communities that might otherwise be excluded.

They include:

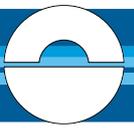
Mobile cinemas: A number of mobile cinema schemes operate in Europe, driving films to inaccessible rural parts of countries. Among the most established are **Cinemobile**, which services communities in the West of Ireland.³⁰⁸ In 2014, Cinemobile took the lead in a scheme, called **North By Northwest – Films On The Fringe**³⁰⁹, supported by Creative Europe, which took selected European films to rural communities on tour in Ireland, Scotland, Iceland, Norway and Finland.

Pop-up cinemas: But one key trend has been the creation of events, which take film out of cinemas and into unusual venues. Among the most established is **Secret Cinema**³¹⁰ in the UK, which builds large-scale experiences around major films.

Community cinemas: Some projects have aimed to establish a more permanent presence in communities, hoping to build a cinema culture, and even an interest in possible careers in film. Some networks, such as Germany’s **Bundesverband kommunale Filmarbeit**³¹¹ has dozens of members in communities across the country.

It is affiliated to the **Fédération Internationale des Ciné-clubs** (FICC)³¹², founded in 1947 and acting as a network of film societies and clubs. Other networks are more specialised including **CINESUD**³¹³, dedicated to Latin American film and bringing together clubs from Europe and South and Central America.

Some projects are specifically aimed at servicing culturally and economically-deprived areas. In 2012, Ffilm Cymru Wales launched a project called **Film In Afan**,³¹⁴ which created community cinemas, alongside education and skills initiatives in villages in the Upper Afan Valley, in what has been named as the poorest region in Northern Europe.³¹⁵



From a standing start and with no previous cinema provision for generations, research showed local people going as many as 20 times a year to see films, far in advance of the national average.

DIGITAL SINGLE MARKET

Nothing illustrates the divisions that crop up when diversity turns into political action than the arguments about the creation of a borderless single market.

For advocates, the issue is clear. The Internet has no borders: So why should we artificially impose the borders of enclosed nation states, largely drawn up in the 19th and 20th centuries on the Digital Age.

The European Commission has proposed a Digital Single Market (DSM) with three core aims.

The first is to create an environment in which digital services and networks can flourish.

The second is to create a level playing field on which the collective economic muscle of European media can take on the US globalised giants, which are threatening to dominate the digital, on-demand world as much as they did the analogue scarcity economy.

The third is to ensure fair access to content any time, anywhere, which it hopes will create stronger pan-European film culture with economic and social benefits. If the unity of Europe is about free movement of people, why is not also about free movement of culture.

"The starting point is not politics but a digital revolution," according to Günther Oettinger, European Commissioner for the Digital Economy and Society, who has been leading the DSM plans.

"There is no longer a German market, a French market and a Polish market but rather the global market."³¹⁶

The initial proposals considered banning geo-blocking, mandating a single European licence, and creating a regime of "passive sales."

The industry has reacted with almost universal dismay. Territorial licensing is not a policy issue to be negotiated: it is the business model of film.

Producers and distributors lobbies argue that the economic impact would lead to the closure of generally small production and distribution companies, and would undermine a film finance system that is largely based on territorial pre-sales.

Cultural diversity and audience access and choice will not be increased if films are not made in the first place, goes the argument.

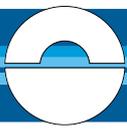
The DSM proposals may be watered down or dropped following negotiations but they illustrate some key points in the diversity debate.

Actions to improve diversity can have the opposite effect. What look like barriers to access might actually be the foundations of the industry. The Law of Unintended Consequences looms large over much of the diversity debate.

But the DSM plans also illustrate the difference between removing barriers and building bridges.

Creating theoretically open access to content does not mean anyone will choose to watch. The answer to increasing the number and diversity of audiences is to build demand and engagement.

If the DSM plans are seen off, the pressure may be on the industry to demonstrate alternative ideas for audience building in Europe.



11. CONCLUSIONS & RECOMMENDATIONS

***Building Bridges* has tried to demonstrate that diversity is a complex, and sometimes contradictory mix of politics, economics, sociology and culture, only some of which is in the power of the film industry to influence.**

While some glaring disparities are now on the industry agenda, others remain overlooked through a mixture of circumstance, ignorance and complacency.

If there seem to be easy answers in policy, it is generally because the hard questions are not being addressed.

It is essential in taking on diversity to recognise a serious institutional failure over many years to even recognise that there was a problem to be solved.

That failure had many causes in terms of funding and policy; in the working of markets; and in a fragmented value chain made up of specialised small and medium-sized businesses, where the bigger picture was easily missed.

There is at least now momentum behind change but that important fact should come with caveats. The pressure for quick solutions and the (very real) need to be seen to doing something, can lead to unintended consequences in the long term. Top-down short-termism should be avoided, or at least its limitations understood.

At the core of the diversity problem for European film is inadequate supply of diverse talent and a related weakness of demand, rather than direct discrimination.

It is also important to distinguish between measures to pull down the barriers to discrimination, and the need for deeper, far-reaching reforms that will encourage people to take up the opportunities that have been made available.

Pulling down barriers is the easy part. The key to a truly inclusive film culture is building bridges to encourage access, engagement and participation across the full diversity of communities.

While the primary aim of this report is to foster debate and discussion, rather than suggesting solutions, it is perhaps useful to share some conclusions and recommendations.

CONSULTATION AND DEBATE

The main recommendation of this report is that diversity, almost by definition, needs to be a dialogue with a diverse range of interested parties.

The diversity issue will not be resolved by liberal film Establishments alone, particularly those national institutions based in the affluent

cosmopolitan capitals, where actual experience of cultural and social exclusion is often negligible.

There has, of course, been discussion with lobbying groups and industry bodies, particularly about employment equality and quotas. It should also be noted that compartmentalising issues makes tactical decision-making easier. Sometimes it is necessary to chop up meaty issues into their component parts in order to achieve results.

But it is surely self-evident that dialogue with those excluded and under-represented is critical to diversity policy. The major institutions of film, that now aspire to lead the current debate, ought at least to look at how far their own lack of representation is, or has been, part of the problem (See p. 57).

Listening to a wider set of voices needs to be a core part of the current debate for film bodies and to become an integral part of all future reforms.

Recommendations

- A programme of consultation should be an urgent priority, with a wide enough scope to include industry partners, local and regional film agencies, community groups and education and academic institutions.
- Any consultation should also strive to gather the views of consumers – both those who watch film and those who do not – using available research tools.
- All institutions should have transparent but variable targets to reflect local conditions, rather than simply a single global figure.

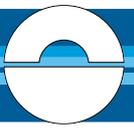
THE KNOWLEDGE GAP

There's a worrying ring of truth to the argument that the diversity problem in film was not noticed because film was so convinced of its liberality.

Hard facts are the best antidote to complacency but unfortunately there is a serious knowledge deficit in the film industry and data collection, management and analysis remains a weakness

To be fair, there has been an improvement in the commitment to research in recent years but the industry is playing catch up. While there is now more evidence of the scale of the diversity problem, particularly surrounding gender issues, there are still major gaps, particularly in the areas of social class and in understanding why potential audiences do not choose to watch European film.

The scale of the knowledge challenge is best illustrated by the fact that fundamental questions that should be at the heart of policy are not known, such as why the relative equality of women in film schools is not translating into equality in key creative positions in the industry.



11. CONCLUSIONS & RECOMMENDATIONS

The analysis of the social make-up of film in terms of production, industry and audiences is still deeply inadequate.

Conjecture is a dangerous basis for diversity policy.

Recommendations

- The creation of recruitment databases to make it much easier to find qualified talent from a diversity of backgrounds.
- Public funds to incentivise data collection and analysis in terms of industry diversity and consumer interaction.
- Encourage data sharing and collaboration between public bodies and across international borders to build economies of scale and a richer knowledge base.
- Lobby for greater transparency of data access from global VOD platforms.
- Ensure that data reflecting changing demand from diverse communities is translated into action in production commissioning, etc.

INSTITUTIONAL REFORM AND DEVOLVED RESPONSIBILITY

The leading film institutions and funds around Europe have rightly, if belatedly, taken up the challenge of tackling diversity but it is important to remember that these disparities became established, largely unnoticed and unchecked, over many years.

The blame for the diversity problem in film cannot be solely laid at the door of the variety of small businesses that make up the industry, and nor should the responsibility for solving them. Neither in Europe, can the finger be simply pointed at market failure. It is essential to face the deep failure of public policy and of institutional practice.

Serious examination is needed of the leadership of institutions, with particular attention, following the example of other industries, on the boards, which often represent the "great and the good" rather than reflecting the diversity of industry, audience, or wider society.

Members of boards cannot be blamed for the problem and their (often unpaid) energy and effort is essential to film. The benefits of connections, influence and expertise should not be underestimated but there are opportunities to broaden the range of partners and participants in decision making. Community, consumer and campaign groups, representing a diverse range of people, for example, might offer considerable value, perhaps channelled through advisory boards, potentially shadowing the main board.

Among the clearest dangers of the top-down imposition of quotas and policies is that the lead institutions are too far removed from the issues on the ground.

A commitment to diversity does require national bodies to take a lead but it also surely requires them to listen. The logical approach is to devolve responsibility

Diversity problems are not the same everywhere. Many of the poorest parts of Europe are rural areas, where there are relatively low levels of immigration but high degrees of cultural deprivation and weak social mobility.

The issue of community participation, access to facilities, etc. will be subject to considerable social and geographic variations. There may be issues around linguistic diversity, which remain neglected in much of the current debate. The problems of discrimination may be very different from those in cosmopolitan cities.

There are dangers inherent in single national quota levels that do not reflect realities in the regions, and indeed may encourage still more companies to head for the main population centres, where hitting centrally-decided targets is considerably easier.

There is a very strong case for policies, quotas and incentives, aimed at decentralisation and regeneration of poorer areas of countries. It is just as possible to transparently measure interventions based on geography as it is on gender, ethnicity, sexuality, etc.

Devolving responsibility for diversity to local and regional bodies, albeit within a national policy framework, is essential. The closer policy is to the people it is meant to serve, the better.

Recommendations

- A review of the make-up of the boards of film institutions.
- Examine the potential for expanded advisory boards, or shadow boards and committees, made up of partners from a range of bodies.
- Increase the role of regional bodies and local partners in ensuring that targets address local realities and specific conditions.

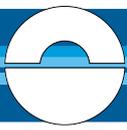
JOBS AND QUOTAS

It is important that evaluation and consultation does not become an excuse for inaction. There are pressing issues that ought to be addressed immediately, notably employment equality. It is difficult to see a short-term alternative to the blunt instrument of quotas.

Targets on diversity, imposed on businesses through stick and carrot measures, can produce fast results and have one considerable virtue: they are transparent and measurable.

The danger is that those quotas can become ends in themselves, masking underlying problems.

There is a good argument that, in some cases, quotas can weaken the diversity of the industry by incentivising businesses to move to the major cities, where there are more qualified people from a wider range of backgrounds than the regions.



11. CONCLUSIONS & RECOMMENDATIONS

Quotas are also weak in dealing with problems, such as social class, where the problems are more complex and the objectives more challenging.

On the the other hand, the serious limitations of quotas in tackling the broad diversity agenda does not undermine their value in areas, such as access to the key creative roles for women.

As the late journalist and author Christopher Hitchens used to warn progressives: "do not make the best the enemy of the good."³¹⁷

Recommendations

- Create apprentice schemes and mentoring schemes with clear diversity targets.
- Ensure that jobs quota systems are transparent and simple, working to fixed timetables with a clear end point.
- Ensure that quotas are accurately targeted to local need and recognising different socio-economic and social factors between different areas of countries.
- Build in consistent reviews of all affirmative action to ensure that they are operating fairly and adapt to changing circumstances.
- Consult over other measures necessary to supporting equal opportunities and access, including childcare, transport, price, etc.

ECONOMICS AND BUSINESS MODELS

Equality of opportunity and employment is meaningless without a sustainable industry, and viable businesses. A fair share of nothing is the emptiest of victories.

It is important to qualify the 'broken industry' argument. There are people and businesses making serious money and European film companies are making a global impact.

But the film industry in Europe has polarised so much that it is hard to talk about a single industry today.

There is a rarified and ever more dominant top end, led by Hollywood; while at the other end of the scale, micro-budget films have never been cheaper to make, even if they rarely recoup on their production budget. Both ends of the scale are challenging for diversity. At the top end, the atmosphere is risk-averse, looking for commercial themes that might succeed commercially across the world, and increasingly in the vast emerging markets, notably China.

The desire to succeed in global market raises difficult diversity issues, including the dominance of the English language and on-screen representation of women and minority groups, which might offend the sensibilities, or prejudices, of global markets.

The desire to mitigate risk often means falling back on established talent, which makes it difficult for new talent to break through. Given the historic domination of white men in key creative roles, that emphasis on the tried and tested makes it difficult for women and minorities to get a foothold.

At the other end of the budgetary spectrum, the lack of diversity is far less about market forces, or about discrimination. Lower budget and arthouse film is overwhelmingly created by small and medium-sized businesses, made up of a small number of people, often friends, and sustained by a narrow group of trusted contacts, a great deal of enthusiasm, and the life support system of public funds.

The lack of diversity within those companies is rarely an issue of discrimination. It is only when you add up the total of people working in those companies that the lack of diversity becomes clear.

The argument then is whether there are reasons why those setting up companies are drawn from too narrow a social spectrum.

At least part of the argument is one of sustainable business prospects. For many, independent film does not look like a viable career option and there is a lot of truth in that view.

The middle ground, where there was significant employment, has been severely impacted by the decline in DVD and television revenues, and the failure, at least so far, for VOD to fill the gap.

Cultural diversity policy in Europe has arguably added to the problem. In particular, public funding has supported a substantial increase in the number of films made (in most but not all countries).

An over-supplied market has put a further burden on what was already a struggling market. There can be a tension between diversity and sustainability.

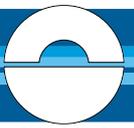
The truth is that the cinema career ladder, which has always been steep, now has rungs missing from the middle.

Film training normally supports new talent at the start but throws them into a market, where opportunities to rise to the top are becoming scarcer.

The diversity debate ought to put to bed the self-serving and complacent view that the cream will always rise to the top.

European film does not have the excuses that Hollywood can use. It is very largely dependent on public funding, itself based on the notion of cultural diversity beyond mere market forces.

Public funding, implies, perhaps demands, a different approach.



11. CONCLUSIONS & RECOMMENDATIONS

Recommendations

- Test the impact of innovative business models and cross-media multimedia projects on business and audiences through transparent prototyping schemes.
- Increase public support for audiovisual work that is not aimed at cinema release, or which prototypes elements of a longer-term big-screen project, as a means of identifying and testing talent.
- Consult with film schools, education institutions and other industry bodies in the creation of a reformed career and training structure.
- Experiment with audience-centric schemes that encourage diverse kinds of engagement, such as crowdfunding, crowdsourcing and new kinds of IP development.

BUILD THE BASE

Journalist and author Caitlin Moran makes the case brilliantly that the task of a truly diverse and dynamic art form is to embrace the “unknown unknowns. All the films, TV shows, songs and ideas we don't know we're not getting. The people who should be famous, talked about, allowed to create but aren't.”³¹⁸ For that is what inequality means”.

The most worrying question for European film may not be who is being excluded, but that so many of those left out have so little interest getting in.

Diversity cannot be imposed. The participation of excluded talent and active audiences has to be earned. Film needs the fresh voices more than they need film.

The importance of film education in schools cannot be overstated. The nature of that education is open for debate, although it should be heavily focused on participation in film-making. The future of film diversity is very largely dependent on serious investment of time, money and energy in schools.

Post-school education should also be reviewed, notably the provision of, and access to, film schools. But there are other opportunities for building the base.

The good news is that the tools for broadening participation are now widely and cheaply available.

The audiovisual language, developed in cinemas, is also at the heart of a new phase of Internet culture.

Fast broadband speeds and greater compression technology is ensuring that online interaction is increasingly based on moving images.

The tools are already in place to build a diverse and participatory film culture. The sharing of views and reviews is now commonplace, and the emerging trend towards crowdfunding and user-generated trailers, etc. should be encouraged.

Perhaps more importantly, anyone today can make a film – in the broadest sense of a piece of audiovisual content – and the YouTube experience suggests that someone will watch.

That trend could, and should be encouraged. An active grassroots film-making culture may well mean the creation of vast amounts of content that would never pass an industry quality test.

But so what? The vast numbers of people who kick around a football, or twang a guitar, or scribble a story may produce only a tiny number of professional players, musicians or writers.

A vital and dynamic amateur sector, involving the broadcast diversity of people at the grassroots may have long-term benefits in identifying and nurturing new talent.

But a vibrant film culture is not simply about supplying the industry with fresh voices, it is also about making film relevant to a wider group of people. The evidence is overwhelmingly that the most rudimentary engagement with the process of production dramatically increases interest in watching the pros at work.

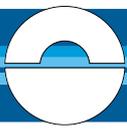
It also makes audiences more willing to participate in film-related activity, such as crowdfunding, sharing views and reviews, etc.

There are many other issues, of course, that hold back engagement, including price, media literacy, and the weaknesses in business and content spelled out elsewhere in this report.

Building a diverse grassroots film culture should be among the highest priorities of film policy and practice.

Recommendations

- Put media literacy at the front and centre of diversity policy.
- Give participation in film-making a bigger role in formal and informal education.
- Increased attention on education, and particularly practical film-making skills.
- Review film school diversity and provision.



11. CONCLUSIONS & RECOMMENDATIONS

DIVERSITY AND COHESION

The very concept of diversity is a challenging one in the on-demand, always-on digital age.

The mission of public institutions in the 20th Century was normally to broaden access to, and (to an extent) participation in, culture in a variety of forms. Diversity was closely linked to social cohesion.

Today, fragmented audiences may see diversity as meaning immediate access to the things that interest them as individuals, or as part of self-selected communities. Cultural diversity then becomes a question of aggregating niches, rather than a cohesive force.

From a business perspective, such thinking creates opportunities. The trick is either to work within popular and well-established niches (such as genre film); to broaden the market for niche film by focusing on international audiences; or by finding and nurturing established audience groups, willing and able to pay premium prices, for example, through specialist VOD sites, or boutique cinema.

Listen carefully, though and there is a warning from history in double time and chromatic scales. Jazz is a near contemporary of cinema and was arguably the greatest musical art form of the 20th Century, with roots in Africa and the African-American experience.

It still retains a certain influence in music but it has become a heritage form, shorn of its strength as a dynamic driver of culture.

It is hard now to imagine the impact of the disruptive geniuses of Louis Armstrong, Charlie Parker, John Coltrane, *et al*, or to grasp the cultural importance of a form that rose from the African-American experience (even if, in Miles Davis' terms, it had been co-opted by an 'Uncle Tom' industry³¹⁹).

One can only get a melancholy hint of that past when the surviving greats play at upmarket jazz festivals before overwhelmingly upmarket white audiences. Today, only 17% of the jazz audience is under-45 and 80% of the audience is white.³²⁰ Artists can still make money and jazz is a high prestige and generally high-price niche.

But niches are dangerous places to get comfortable. Cultural forms do not die because their business models are disrupted; they are condemned to live in a limbo of irrelevance.

Digital technologies may have created, or at least supported, these trends. But they also offer solutions: tools are now readily available for communicating with audiences and for broadening both access and engagement with culture.

It is possible to marry 'on-demand' individualism and cultural cohesion but it requires democratic and inclusive reform.

"Culture is in constant motion and is always linked to power relations. Cultural rights must be understood as also relating to who in the com-

munity holds the power to define its collective identity," according to United Nations Special Rapporteur and human rights activist Farida Shaheed, in her introduction to the UNESCO report on gender rights and creativity.³²¹

Who controls media and culture matters; who has access to the means of expression matters; fair and equal access to culture matters. Social cohesion in the 21st Century will not be about acquiescence to a top-down ideal. It will need to be the result of active and participative engagement from the full diversity of society.

Recommendations

- Expanded access to the cinema experience, through community activities, pop-ups, events, etc.
- Emphasis on social media skills, crowdfunding and early-stage engagement and prototyping.
- Support work in identified gaps in European film production, in respect to audience diversity, and incentivise film-makers to create work to fill them.

CONFIDENCE IN CULTURE

A recurring theme of this report is 'confidence.' It plays an essential role in diversity in all walks of life.

Confidence can mean self-assurance, built on the foundations of hard work and fulfilled potential. It can equally describe an unwarranted sense of entitlement and arrogance. Too often, the privileged lack the self-awareness to know the difference.

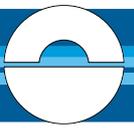
Diversity policy ought to be based on creating the equality of opportunity that will allow confidence to grow among under-represented groups. And it should fearlessly tackle entrenched and excluding elitism in the industry, even to the point of questioning definitions of quality and excellence in film itself.

There is another aspect of confidence, however, that needs to be addressed: European film, and independent film has been suffering what might be called a 'crisis of confidence.'

Although it is not often expressed in such stark terms, the neurosis is based on the suspicion that film is a 20th Century art form, ever more threatened by digital innovation.

Just because film is paranoid, does not mean that it is not genuinely under threat. Independent business models have been eroding; audience demand is dramatically changing; and every day new competitors emerge in the fight for precious consumer time.

The fear is most openly articulated in respect to young people, whom it is felt might see European film (if they see it at all) as yesterday's story,



ABOUT THE AUTHOR

overtaken by the thrills of videogames, social media and online video. Part of the concern is for the future of public funding. Governments are generally most swayed by economics – inward investment in terms of international production, jobs and occasional major hits.

The argument for cultural film is more precarious and diversity of production and audience is a serious issue.

Public institutions responsible for allocating funds were meant to be the enablers of cultural diversity, not a life-support system for the existing industry.

If they are serious about diversity they need to ensure they are listening before demanding.

They may also need to be bolder in embracing change and technology and less worried about shooting the odd sacred cow.

They should understand that diversity for film not just a duty, or a moral obligation.

The whole industry needs to understand that new voices are essential to renewing the art form and allowing it to connect to fresh audiences.

Diversity is what will drive film on as the dynamic vehicle for expressing and sharing who we are as human beings.

ABOUT THE AUTHOR

Michael Gubbins is a journalist, analyst and consultant working in the film, media and creative business sector. He is a co-founder of SampoMedia and chair of Welsh film agency Ffilm Cymru Wales.

He is the former editor of the leading international film business title, *Screen International* and its website *Screendaily.com*.

Building Bridges is one of a series of reports for CineRegio, centred on digital change in the film and media industries and on the implications of changing audience behaviour and expectations.

SampoMedia is a business, working on audience-based film and creative business analysis and research. It applies its findings through workshops and mentoring around the world. Since its creation in 2012, it has worked in 28 countries from Australia to Canada and Colombia to Austria.

It was co-founded with former head of distribution and exhibition at the UK Film Council and BFI, Peter Buckingham.

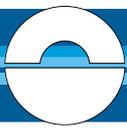
Gubbins chairs and speaks at industry conferences around the world, covering all aspects of the film industry and, among his industry roles, is a member of the experts committee of Europa Cinemas; and a member of the advisory boards of Power to the Pixel and the Met Film School and a regular tutor at the Media Business School.



His clients have included: The BFI, Telefilm (Canada), Europa Cinemas, Europa Distribution, Cine-Regio, Creative Europe, Rotterdam International Film Festival, Power to the Pixel, Cannes Film Festival, Curzon Film World, Film Audience Network, Canadian Media Fund, and the Media Business School.

During more than 25 years in journalism, he also edited leading technology journal *Computing* and music business magazine *Music Week*, as well as editing and news editing daily newspaper titles and writing articles for leading national and international publications in the UK and beyond.

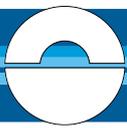
Contact: mike@sampomedia.com, **Website:** www.sampomedia.com



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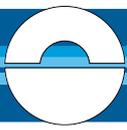
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