



D2.3. Comparative analysis report on national film agencies

Project: Reviving, Boosting, Optimising and Transforming European Film Competitiveness - REBOOT

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REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.



1. PROJECT DESCRIPTION

This project focuses on the European audiovisual sector and film industry. It aims to connect their existing strengths, identify and overcome weaknesses, and plan for future competitiveness in the fields of policy, practice and experience. More concretely, the project's objectives are, on the one hand, to explore the long-standing strengths and pervasive gaps in European competitiveness and policies for competitiveness – including ways of 'measuring', 'analysing' and 'evaluating' the impact of policies and strategic pathways. On the other hand, the project aims to focus on actively preparing for the future by exploring audience preferences and how these are generated, as well as modes of film content production.

The latter are elements which today's youth will carry and engage with in the coming decades as makers and consumers, as well as industry and policy leaders. The project therefore interrogates the 'what is', but also the 'what has been' and 'what will be' through fresh lenses. REBOOT sets out to provide a holistic picture of the European film industry with a view to maximizing its existing strengths, plus strategies and tactics for optimizing the potential of European youth audiences, both as emerging audiences and as citizens. Specifically, the project's goals combine several dimensions which reinforce each other but are listed separately (and in no particular order) for analytical purposes: a) increasing support intended to boost young people's engagement with European film; b) strengthening the EU's position in the global audiovisual economy, particularly in light of the rise of video-on-demand services; c) supporting cultural diversity in the EU film industry; d) addressing the need for a different understanding of competitiveness and relevant indicators in this context; and e) recognizing and supporting the importance for the EU of film and, more broadly, of the cultural and creative sector as a geopolitical asset.



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2. EXECUTIVE SUMMARY

This report explores the transformation of the national film agencies in Spain, Poland and Finland with special regard to the implementation of national and EU film policies, their impact and adaptation to the national contexts and how these relate to the concepts of “European” and “competitiveness” over the last 25 years.

Three research groups at Complutense University of Madrid (UCM), University of Warsaw (UW) and University of Jyväskylä (JYU) have conducted their analysis combining diverse perspectives, including historical, organisational, founding and policy-making points of view. The analysis includes in-depth interviews with key actors at the institutions such as their directors and former directors, as well as managers, technicians and other relevant authorities.

The agencies under analysis are members of the EFAD, the European Film Agency Directors association, which was officially constituted in 2014 under Belgian regulations. The Spanish case study focuses on the Institute of Cinematography and Audiovisual Arts (Instituto de la Cinematografía y de las Artes Audiovisuales, ICAA), Spain's primary public body for cinema since 1985. The Polish case concentrates on the study of the Polish Film Institute (Polski Instytut Sztuki Filmowej, PISF), founded in 2005. As in the Spanish case, the institution oversees the distribution of the public funds allocated to support audiovisual production in Poland and is central in the national film policing. The Finnish case study presents the Finnish Film Foundation (Suomen elokuvasäätiö), which plays a similar role to the institutions mentioned and is the main funder of the Finnish film industry; it was founded in 1969.

After an introductory and methodological part developed in chapters 3 and 4, film agencies are introduced in chapter 5. Chapter 6 offers a more analytical take on the transformation of these institutions in the last 25 years. In this chapter, the case studies will be presented separately, and the analysis will cover the subjects that have been described above. However, the structure of each of these parts will reflect the particularities of each case study and the sense of transformation.

Since the beginning of the 1990s, European policy makers adopted two different strategies to face the challenges posed by the rise of international media conglomerates that endangered independent film production. Both had impact on the work of the agencies: On the one hand, they stressed the need for the European audiovisual industries to be competitive in a globalised world where American and Japanese multimedia companies were starting to take the lead (Schlesinger, 1997, pp. 369–391). On the other hand, continental policymakers were also adopting the defence of cultural



diversity as one of their main cultural policy's guidelines; the audiovisual was considered a strategic economic sector (see the classic *Exception culturelle et mondialisation*, by B. Gournay, 2002, and the recent report by Psychogiopoulou et al., 2024). The transformation of the agencies, seen in part as an implementation of European policies, will thus have one of its main threads built on this tension between competitiveness and cultural diversity.

The analysis of the three case studies has been completed through a mix of desk-based research of policy documents and official data, secondary sources and empirical qualitative research based on semi-structured interviews (on-site and online) with staff members of the institutions and other stakeholders of the national film industry who shared their views on the agencies, with coding frames and data analysis. Secondary sources consulted were mainly reports, texts and articles published by scholars working in this field.

Data has been gathered throughout 2023 and 2024 in the three participating countries. The discussion focused on the five points covering the structure, function and principles of the institutions. People were therefore interviewed on the a) activities of promotion and aids in each of the three case studies (on the limitations, legislation); on the b) internal management of the institution; on the c) relation to Europe regarding for instance film circulation, policies and general perceptions of national and continental cinema; on d) competitiveness of the national film industry in its different forms and the transformation of the idea since 2000; and on e) their consideration of audience preferences, etc.

Chapter 5 provides an overview of the three institutions under consideration. It presents information on the context in which they were created, their functions and goals, as well as their structure. Its last part focuses on policy and funding. This part also highlights in its conclusion several thematic threads that mark the specificity of each case.

In the Spanish case, these threads interpret the founding of the ICAA among other transformations that marked Spain's transition to democracy after the end of Francoist dictatorship (1939–1975). Spain joined the European Communities on 1 January 1986. In comparison with other (mainly western) European references, the report states a late development of a modern film policy, that was born at a crossroads between the rearrangement of the state institutions following 40 years of dictatorship, a general decrease of cinema's public presence (that was also affecting all European nations at the time), and the gradual realignment of the national cultural policies along European lines.



The analysis of the PISF showcases its centrality in the national film industry and provides detailed information about its structures and areas of intervention. But it also points out the difficulties to access certain specific data on its organisation (such as the number of employees). Another critical aspect of the analysis has been the institution's (lack of) stability and long-term strategies, as well as its often conflicting relation with the political power. Having been established as a public institution and funded through the budget by the Ministry of Culture and National Heritage, the Polish Film Institute has been often criticised for its lack of independence from the governments.

The analysis of the FFF stresses its role as a key player in the Finnish cinema ecosystem. Initially it points out how funding grew rapidly in the 1980s, only to fall during the recession of the 1990s. The situation changed profoundly for the better in the late 1990s, when the application for production aid was reorganised and many other reforms took place. The boom of Finnish cinema that took place in the late 1990s is seen central in this regard, as, together with other factors, it led to the professionalisation of film production and filmmaking in general. Although the Foundation had developed international relations since the 1970s, a significant change in this area came only after 2010, allowing the Foundation to adopt an increasingly varied role in the Finnish film industry.

The assessments in chapter 6 are focused on these areas of interest. Thus the actual structure varies in each case study to accommodate the particularities of the three examples as well as the information available. From a diachronic perspective, the analysis helped to identify policies and other forms of intervention through which the three film agencies have promoted competitiveness in their national film industry; it illuminated their impact on the promotion and the defence of national and European cinema and pointed out how the institutions and the national film contexts in which they were embedded reflected three very diverse industrial, cultural and historical backgrounds.

This is indeed a history of transformation that shows the particularities of each agency (e.g. the role played by the ICAA in the shaping of film policies in Spain; the difficulties caused by political control in the Polish PISF; FFF's efforts to secure financial support for Finnish cinema comparable to that of the other Nordic countries), but also highlights general trends in film policies and their relation to the idea of competitiveness. In simple, industrial terms, competitiveness seems to be too limited a term to assess the form of support that the agencies have been offering in the 25 years under analysis, since they understand their work mainly in cultural terms. Their actions show that, beyond the changes already pointed out, artistic quality and diversity are still seen as a strength in their understanding of both domestic and European cinemas.



Despite their differences, all three agencies work on a mixed model, paradoxically European, of competitiveness. This model is essentially based on finding the right balance between the promotion of cultural diversity and industrial growth. At the same time, the policies could be also seen as a reaction to a legal European framework gradually interested in promoting audiovisual industries in ways that felt menacing for smaller productions or contexts. In this regard, Europe also functions as a market still considered hard to conquer.

The conclusions and recommendations (chapters 7 and 8) build on these differences and gather examples from all three agencies. At the same time, they seek to sum up relevant *specific* aspects around three areas that, while looking at the past, also help illuminate the present and future of European film. These are a) the institutional aspects of the work of each film agency; as well as their changing approach to b) the questions of film competitiveness and of c) the European film industry. To each one of those points the report presents final recommendations:

- To explore other forms of administrative independence that keeps a distance between politics and decisions on support of cinema and help secure the long-term viability and effectiveness of the institutions' work.
- To take the diversity of contemporary audiovisual culture more strongly into consideration in their funding and support systems, adapting thus to different forms of distribution, exhibition, and consumption, to the diversity of productions and audiences without forgetting their primarily cultural commitment.
- To focus some of their resources, beyond their central function in the support of culturally valuable productions, on the promotion of international agreements that enhance the accessibility to and distribution of European films in international markets.



3. INTRODUCTION

This report analyses the diachronic understandings of the ‘competitiveness’ and of the ‘European’ in the European film industry (EFI), particularly in relation to the role played by film agencies and the impact of the national and EU film policies.¹ The focus is on Spain, Poland and Finland, three different countries – the case studies – all of which experienced a lengthy way of film industry development with their own socio-political and cultural agendas, transformations and challenges over the last 25 years.

Three research groups from the Complutense University of Madrid (UCM), University of Warsaw (UW) and University of Jyväskylä (JYU) have conducted a **multi-layered analysis from different perspectives, including historical, organisational, founding and policy points of view when it comes to the funding of the agencies, their performance and the relevance via the lens of competitiveness.**² The qualitative approach is based on twenty-seven semi-structured interviews with national experts, former and current directors of the national film support institutions, alongside managers, technicians and other relevant authorities (see Annexes 10.2.).

The analysis of the Spanish case study focuses on the study of the ***Institute of Cinematography and Audiovisual Arts (Instituto de la Cinematografía y de las Artes Audiovisuales, ICAA)***, Spain's main public institution for cinema since 1985. The Polish case concentrates on the study of the ***Polish Film Institute (Polski Instytut Sztuki Filmowej, PISF)***, founded in 2005. The Finnish case study (JYU) presents the ***Finnish Film Foundation (Suomen elokuvasäätiö)***, the central funder of the Finnish film industry, founded in 1969.

The report aims to identify the policies through which the national film agencies have promoted competitiveness and other EU values (such as cultural diversity or equality). It analyses the agencies’ impact on the policies, on the promotion and the defence of national and European cinema in each of the countries, as well as other forms of intervention in the national film landscapes and their cooperation with other European film institutions through this period. Unlike other cultural sectors, the management of film policies in Europe is generally articulated around film agencies endowed with a certain autonomy. **Agencies** are among the central agents of film support and therefore,

¹ Due to its varied nature, the report chose the formulation “film agency” for its title as an umbrella term to cover the three case studies that refer to a foundation (Finland), and two institutes (Poland and Spain) that also house national film archives. At the same time, these three institutions are part of the EFAD (European Film Agency Directors association) that defines them as (cinema, film or screen) agencies. In this introductory part, the report will refer to them as agencies; the further discussion of each case study will use the original term. See Murschetz et al., 2018.

² In order to stress relevant ideas and facilitate its reading, the report highlights key sentences and expressions through the use of bold text.



among key institutions to deal with the national and European film competitiveness. While their specific function and structure may vary, they all support the national film production in different forms (see, for instance, the highly interwoven areas of production, distribution and exhibition), they are all committed to the overall challenge of promoting and developing film cultural initiatives. As the report will show, agencies are also interesting as they show, in different ways and different intensity, the impact on film culture of changing political agendas. Overall, among their key functions and responsibilities are:

- Channelling film policies.
- Funding and subsidising the film work and infrastructure.
- Contributing, in some cases, to the development and transformation of the legal framework of the film and audiovisual industry.
- Mediating between different areas of the national film and media landscape via channelling their demands and requirements:
 - o They mediate between the industry and the state (and function often as a voice of the former while approaching the latter).
 - o They help, with different degrees of success, to negotiate between the interests of the different sectors of the industry (producers, distributors, exhibitors, etc.).
- They support networking and channel international collaboration, such as EFAD, the European Film Agency Directors association.

The **three case studies from Spain, Poland and Finland also present significant cultural-policies variations**. The agencies were founded at different times (the FFF in 1969, the ICAA in 1985, and the PISF in 2005), reflecting different historical contexts and backgrounds; they are part of different national film narratives and histories. As the following chapters will explore in detail, their functions and areas of intervention also vary (for instance, while the Spanish ICAA and the Polish PISF are also responsible for the national archives, their Finnish counterpart is not). This report reflects these differences and, at the same time, it provides an analysis that, through indirect comparison, helps highlight individual shortcomings or strengths.

These institutions are also different in their organisational settings, including the size and areas of responsibility. Regarding for instance their personnel, there are 250 people employed at the ICAA (Spain), while the FFF in Finland has a staff of 29. There is no relevant data about the employment of PISF (Poland), which points out an overall challenge regarding the transparency of its work.



The agencies analysed here are members of the EFAD. Its 38 members are government or government associated public bodies, in charge of national funding for the audiovisual sector and with the responsibility to advise or regulate on audiovisual policies. The EFAD members and their governments allocate around three billion Euros annually through subsidies and tax reliefs with a view to fostering the creation, production, promotion, distribution, and exhibition of European audiovisual and cinematographic works.³

The analysis of the ICAA, the PISF and the FFF aims to broaden our understanding of the way agencies function in the EU, especially as the analysis is usually focused on examples such as the French *Centre National du Cinéma et de l'Image Animée* (CNC), which functions as a reference for our three case studies. At the same time, considering their contexts of emergence, the three agencies have exemplary value as they offer three different frameworks for understanding the competitiveness of the film industry:

- Spain, with 48 million inhabitants, is among the top five film-producing countries in Europe. According to official statistics, 375 feature films were produced in Spain in 2023 and the box office gross that year was €493 million (Ministerio de Cultura, 2024). As in other European countries, the state plays a central role in subsidising its film industry. This support is channelled through the ICAA and the regional governments with different programmes: some of them (Madrid, Catalonia, Basque Country and Aragón) even have their own aids for the support of feature films (see de la Sierra, 2019). Spain joined the European Economic Community (later the EU) in 1986, and has been a member state of Eurimages since 26 October 1988. Spain was also among the 12 participating members of the first MEDIA programmes (MEDIA I, 1991-1995). Today, beyond its film historical relevance, the country is responsible for 11% of European productions (Jones, 2024), while its industry shares some of the problems common to other European countries (overproduction, underperforming box office, lack of circulation abroad). In the last few years, Spain has also been central in attracting major streaming platforms such as Netflix.
- Poland has a relatively large national film industry (approx. 38 million inhabitants), strongly shaped by the so-called Central and Eastern European film model after the socio-political transformations of 1989. In 2024, the film industry in Poland equalled €315.9 million, positioning the country among the eight highest revenue-generating European film markets (IBISWorld, 2024). In the same reporting year there were 106

³ <https://europeanfilmagencies.eu/>



feature-length films and 256 medium-length and short films for cinema and television. The total box office gross was €170 million. In 2022, Poland housed Netflix's Central and Eastern Europe hub followed by other financial investments from global streaming services (Kostovska, 2024). Poland joined the EU in 2004, although it had already been part of Eurimages since 1992 and the Media Programme since 2002. European funds, of which Poland is a beneficiary, provide the financial support and the creation of opportunities for international cooperation. The MEDIA strand of the Creative Europe programme supports the European film and audiovisual industries to develop, distribute and promote European works, taking into account today's digital environment.

- Finland (5.6 million people) is the second smallest film industry in the Nordic countries with an output of approximately 35 feature films a year over the past decade. In 2023 Finland's box office gross was €93.5 million. As a small language area, Finland offers a very small audience for Finnish-language films. During the 2020s diverse Finnish cinema has begun to attract attention in the international festival competition series. In the last few years several Finnish films have been sold to cinemas in more than 30 countries (Rantamäki, 2023). Finland's film industry is heavily subsidised by the state. The Finnish Film Foundation receives its funding from the Ministry of Education and Culture and distributes it to Finnish film. The Foundation is the foremost financier of the Finnish film industry and therefore has a lot of influence within this sector. This central position makes it an intriguing subject for research. Over the last 30 years the Finnish film industry has also benefited greatly from the EU's support. Finland joined the EU in 1995, but it had already joined Eurimages in 1990 and the EU's MEDIA Programme in 1993.

The focus on the national film agencies in Spain, Poland and Finland offers an important addition to relevant research projects of the last few years. This includes the project by the Arts and Humanities Research Council (AHRC) entitled *Screen Agencies as Cultural Intermediaries: Negotiating and Shaping Cultural Policy for the Film and TV Industries within Selected Small Nations* (2018–2021). Through the findings of 46 semi-structured interviews, this reference covered film agencies in Belgium, Croatia, Denmark, Ireland, Northern Ireland, Scotland, and Wales.⁴ There is also *Commissioning Creativity and Funding Film*, investigating the digital, economic and global challenges of the screen industries in Scotland, Denmark, the Netherlands and Sweden.⁵

⁴ See in this regard www.smallnationsscreen.org.

⁵ <https://www.gla.ac.uk/schools/ccs/research/ccpr/researchinccpr/commissioningcreativityandfundingfilmworkshops2016-17/>



While being central bodies in each of their territories, the agencies are usually part of a broader network of institutions that also contribute to the funding, promotion and support of the national film industry. Due for instance to the structure of the Spanish state, the intervention of the ICAA in the area of film exhibition is limited, as this is a question of regional (and not state) competence. The report will explore punctually (in some of the case studies) the relations to these other institutional or private actors in the field, which in many cases are central to understanding both the international connections or the regional implementation of the policies; the focus is however on the national level in each country.

In spite of being of central importance in the transformation of European cinema at least over the last forty years, there is **a significant lack of general studies** on the function, history or structures of film agencies.⁶ This situation in the academic field seems also to correspond to the public position of film agencies as some of the least visible and least well-understood actors in the film industry. In recent years, some articles have however begun to examine these institutions, usually from a perspective grounded in cultural policy debates. The general tendency until now is to focus on specific national or regional case studies and on their role in the implementation of certain policies along the lines of gender equality, sustainability (Kääpä and Vaughan, 2024), cultural diversity, and social representation (McElroy and Noonan, 2022, Nooman and Brock, 2023, or Sørensen and Noonan, 2023).

The report will present two long chapters in which, first, the characteristics, functions and structures of the film agencies in Spain, Poland and Finland are introduced (chapter 5), while the next longer chapter (6) offers a more analytical take on the transformation of the three institutions in the approximately 25 years under analysis.

The three case studies will be presented separately, and the analysis will cover the subjects that have been described above. However, the structure of each of these parts will reflect the specificities of each case study (different function, structure and areas of intervention; also the different state of the art regarding the research already done on each of the institutions), and the sense of transformation.

⁶ For a more general approach to questions of film funding on a European level see the recent *Public Funding at a Crossroads*, by Thomas Eskilsson (updated in June 2022) and *All that is solid melts into air – Public Film Funding at a Crossroads II*, also by Eskilsson 2024).



4. METHODOLOGY AND CASE STUDIES

The report analyses the period from the implementation of the public policies on the European film industry to the present day, in a time span that covers roughly the last 25 years (from 1999 to 2024). However, each case study presents particularities that require specific adjustments. The different contexts under consideration explain for instance why in Spain the year 1997 was crucial for the ICAA or why the analysis of the Polish case starts some years later, while at the same time taking into account the weight of the communist structures on the national film industry and the impact of the 1990s in the redefinition of the idea of competitiveness.

Focusing attention on the transformation since the late 1990s means in all three case studies analysing the national responses to international episodes (EU enlargement to the East, global financial crisis, the effects of the COVID-19 pandemic). In all of them the national responses were also affected by European (film) policies, which were a reaction to some specific transformations in the film and media landscape. Since the beginning of the 1990s, European policy makers adopted two different strategies to face the challenge posed by the rise of international media conglomerates that endangered independent film production. Both had impact on the work of the agencies: On the one hand, they stressed the need for the European audiovisual industries to be *competitive* in a globalised world where American and Japanese multimedia conglomerates were starting to take the lead (Schlesinger, 1997, pp. 369–391). On the other hand, European policymakers were also adopting the defence of *cultural diversity* as one of their main cultural policy's guidelines; the audiovisual was considered a strategic economic sector (see *Exception culturelle et mondialisation*, by B. Gournay, 2002, as well as the most recent report by Psychogiopoulou et al., 2024). The transformation of the institutions, seen in part as an implementation of European policies, will thus have one of its main threads built on **this tension between competitiveness and cultural diversity**.

The analysis of the three case studies has been completed through a mix of desk-based research of policy documents and official data, secondary sources and empirical qualitative research based on semi-structured interviews (on-site and online) with staff members of the institutions, with coding frames and data analysis.

Secondary sources consulted were mainly reports, texts and articles published by scholars working in this field. The sources considered dealt also with public policies developed at a national level, with national and European legislation on the media and public funding, as well as with the political and socio-economic context and the history of public institutions.



In-depth interviews with some of their main representatives is central in the analysis of these institutions. The research data was collected throughout 2023 and 2024 in the three participating countries and consisted of twenty-seven (face-to-face and online) conversations with different employees of the public institutions analysed as well as other stakeholders of the national film industry who shared their views on the agencies. Their selection was based on the relevance of the position held in the institution, the time spent managing public policies, the level of experience achieved and the historical context in which the participants carried out their work.

The data provided by the interviews was anonymised in line with the provisions and requirements of the three universities involved in the preparation of this report. The information that can be revealed is the overall description of an interviewee's role and/or experience, alongside the interview date (see table in the report's appendix).

The discussion focused on the **five points covering the structure, function and principles of the institutions**. In each case, the focus was on the historical transformation observed over the 25 years under analysis. They were therefore interviewed on the a) activities of promotion and aids in each of the three case studies (on the limitations, legislation); on the b) internal management of the institution (from the internal structure to the institutional relations to other bodies or the daily activities); on the c) relation to Europe regarding for instance film circulation, policies and general perceptions on the national and the continental cinema; on d) competitiveness of the national film industry in its different (cultural, economic, industrial) forms and the transformation of the idea over the last two and a half decades; and on e) their consideration of audiences, their fostering, the transformation of their public perception, etc.

While these previous considerations set the general analytical framework, each case study has its own particularities regarding sources and methodology. For instance, whereas the Finnish case relies more on interviews that illuminate the specificities of the continuity in a small agency, the Spanish analysis combines the interviews with an assessment on the legal documents that were also central in the work of the ICAA; the Polish case study provides interviewees' evaluation of regulatory and key performance indicators that help address the politicisation of the agency.

- Spain

Within the broader scope of the REBOOT project, for which UCM generated 24 in-depth interviews with stakeholders of the Spanish Film Industry, face-to-face interviews were conducted with three directors of the Institute of Cinematography and Audiovisual Arts (ICAA), as well as with other



authorities who perform or have performed in the past public functions in institutions collaborating with the ICAA such as the Instituto Cervantes, the Spanish Office of the MEDIA program or Acción Cultural Española (AC/E), an agency that coordinates public support for the promotion of culture, both in Spain and overseas. All 24 have provided important contextual information for the report. However, only those conversations directly quoted in the report are listed in the annexes.

The responses collected during the interviews were manually transcribed, edited and coded according to different thematic categories. A pseudonymisation process was carried out by associating an individual code with each participant, although the position held by each interviewee was taken into account when their response was valuable and relevant for the research.

The secondary sources consisted of academic studies that included analyses carried out between 1982 and 2024, statistical reports and national legislation on the creation of public entities from 1984 to 2024, and press articles published in prestigious national media such as *El País*, from 1989 to 2024.

Further information on the institution was provided by the documents produced by the ICAA: the yearbook *Anuario de Cine* (also known as *Boletín Informativo*) and the annual reports on film aid *Ayudas a la Cinematografía*. There was also an annual report taken into account on the fulfilment of the television service providers' obligation to provide advance funding for European productions, which has been prepared since 2013 by the Spain's National Markets and Competition Commission (CNMC, for its acronym in Spanish). Before that, that report was published by the Spanish Ministry of Industry (Díaz-González & González-del-Valle, 2021, p. 6).

- Poland

The Polish research team conducted semi-structured interviews in February–October 2024 with film industry representatives from the production, distribution and exhibition sectors. Across interviews and data analysis, the group was interested in the process of institutionalisation of the Polish film industry.

Overall, 11 respondents were interviewed in-depth regarding the institutional dimension of the Polish Film Institute. For this study, we approached the current and former employees in directive, middle management and executive positions. This process faced several difficulties in the aftermath of the parliamentary elections of October 2023. The group of interviewees was extended by those conducted within the film community, such as the Polish Society for Film and Media Research, the Academic Society and the Polish Filmmakers Association. After transcription, the interviews were



reviewed and corrected for any inaccuracies caused by voice interference or unclear speech. The next step involved anonymising the data by removing any information that could identify the respondents. A coding key was also established, assigning each respondent a unique code number. Desk research in preparation for qualitative data analysis included reports and documents created by, among others, the Central Statistical Office (*Główny Urząd Statystyczny*), the Polish Film Institute and the Polish Filmmakers Association (*Stowarzyszenie Filmowców Polskich*). Among other sources were legal acts regulating the functioning of the Polish film and audiovisual market, for example, cinematography act of 2005⁷. Some of the information was gathered through the analysis of so-called “grey literature,” i.e. online news stories, expert opinions on the overall challenges faced by the Polish film industry.

- Finland

In Finland nine interviews with current and former experts at the Finnish Film Foundation were conducted via Zoom. The distance between the interviewer and the interviewee was such that remote interviewing was the only practical option. The interviews took place between September and December 2023. The responses collected during the interviews were automatically transcribed; the transcriptions were later corrected manually where necessary. The interview material was reviewed to identify key themes and the material was colour-coded. For each interview, summaries were prepared based on the themes identified from the overall data. The data was pseudonymised by giving each interviewee a numerical code. The status of the interviewee was taken into account when it was of particular relevance to the research.

The secondary sources consisted of historical and academic publications from the 2010s and 2020s, and publications by the Finnish Film Foundation including strategies, target programmes, action plans, annual reports, statistical reports, and press releases. Other secondary sources consulted included national legislation on the promotion of film culture and a report commissioned by the Ministry of Education and Culture that explores the possible Finnish model for an investment obligation for on-demand programme services. The following databases were consulted: JYKDOK, KAVI web library, Elonet, and Aaltodoc.

⁷ Cinematography act [Ustawa o kinematografii] (2005). <https://isap.sejm.gov.pl/isap.nsf/download.xsp/WDU20051321111/U/D20051111Lj.pdf>, [access: 28.07.2024].



5. ON THE INSTITUTIONS

This chapter provides an overview of the three institutions under consideration, including information on the context in which they were created, their function and goals, as well as their structure. The last part focuses on policy and funding. Beyond its introductory character, this part will also highlight in its conclusion several thematic threads that mark the specificity of each case. These will provide the basis of the analysis in the next section.

5.1. Instituto de la Cinematografía y las Artes Audiovisuales (ICAA)

5.1.1. Introduction

The Spanish Institute of Cinematography and Audiovisual Arts (*Instituto de la Cinematografía y las Artes Audiovisuales*) is the official body responsible for the planning and management of Spain's state film policies.⁸ It was created in 1984 as an independent institute attached to the Spanish Ministry of Culture and Sport.⁹ In its current configuration, its structure and functions are regulated by the Royal Decree-Law 7/1997 from 1997. Its day-to-day operations and areas of intervention are determined by the Cinema Law 55/2007 and its further amendments, which will be discussed in detail in the next pages. Its funding is provided by the yearly General State Budget (*Presupuestos Generales del Estado*).¹⁰

Historically, the creation of the ICAA can be seen among many other transformations that marked Spain's transition to democracy after the end of Franco's dictatorship (1939–1975). Its inception was part of a series of reforms that reshaped the public intervention in the national film industry following ideals of rationalisation of state policies and democratic governance.¹¹ The ICAA replaced the previous state film office, the General Direction of Cinematography (*Dirección General de Cinematografía*), which had been functioning under different denominations since 1946 and had been responsible, among other things, for the Spanish National Film School (1947–1976), the Spanish National Film Archive (*Filmoteca Española*) (founded in 1953), a censorship system (officially terminated in 1977), film promotion, support of film production, etc.

⁸ Spanish regional governments (i.e., Autonomous Communities) have fully devolved powers and can approve and apply their own cultural policies, including film policies, that must be consistent with the European framework and the legal framework approved for the Spanish State. See in this regard Bonet and Négrier, 2010.

⁹ Law 50/1984, of 30 of December, of Central Government Budget for 1985, 31 of December of 1984, pp. 37557-37586.

¹⁰ All translations of original Spanish texts, including the interviews conducted during the research project, are by Fernando Ramos Arenas.

¹¹ For a film cultural contextualization of the emergence of the ICAA see Triana-Toribio, 2016. See also, in this regard, the analysis of the film policies in the 1980s and 1990s by Pérez Morán and Pérez Millán (2017).



5.1.2. Function and goals; Structure

The Law 55/2007 (still in effect) declares the ICAA as the competent authority for establishing promotion measures for the production, distribution and advertisement of films and other audiovisual works, promotion measures for the support of independent production, as well as the performance of Research, Development and Innovation (R&D&I) activities within the area of cinematic and audiovisual creation. For covering the aids contemplated in this Law (aids for creation and development, for purposes of production, distribution, exhibition, preservation and promotion), the General State Budget includes an annual Protection Fund for Cinema and Audiovisual creation, which is managed by the ICAA.

The ICAA does not manage the aid granted by the EU's Creative Europe MEDIA programme, although it is a founding member of the board of trustees of the MEDIA Office in Spain (SINT5) and one of its direct interlocutors.

While always central in the support and promotion of Spanish cinema, the specific functions of the ICAA have changed over the years. The definitive regulation of the structure and functions of the ICAA came through a Royal Decree-Law in 1997. This document sums up the goals of the Institute in six points:¹²

1. Developing the **creation**, increasing **production** and promoting the **distribution** of Spanish film productions.
2. Achieving an acceptable share of the **domestic market** for the Spanish cinema industry.
3. **Improve the competitiveness** of the private sector and encourage the application of new technologies.
4. The **international promotion** of the cinematography and audiovisual arts of Spain.
5. The preservation and dissemination of **Spanish film heritage**.
6. The **cultural communication** between the regional governments concerning questions of film and audiovisual arts.

In the ordinary management of the institution, these points are translated into activities in administrative, institutional and political areas. These range from reporting on cinema attendance and box office to awarding official prizes or distributing grants to finance films and audiovisual projects.

¹² Royal Decree 7/1997, of 10 January 1997, of the structure and functions of the Instituto de la Cinematografía y de las Artes Audiovisuales, BOE, 24, 28 January 1997, pp. 2583-2585.



The institution is headed by a **President** and a **Director-General**. The Presidency of the ICAA is held by the Minister of Culture, this is however mainly a representative post. The direct command and management of the ICAA is the responsibility of its Director-General, who over the years has been a key figure to understand how the institution has developed its policies. In addition, the ICAA's General Secretary is in charge of the institution's internal and administrative government.

Under the Director-General and Secretary-General, four Subdirectorates manage the institution's main areas of intervention:

- a) A Subdirector-General for the Support of the Film and Audiovisual Industry,
- b) A Subdirector-General for Promotion and International Relations,
- c) A Directorate for Marketing Policies; and
- d) Spanish National Film Archive (*Filmoteca Española*).¹³

The Subdirector-General for the Support of the Film and Audiovisual Industry has the goal of controlling and supporting the three subsectors of the film and audiovisual industry (production, distribution and, since the COVID-19 pandemic of 2020, some specific aspects of exhibition). This is reflected in two main areas of intervention:

- a) The Subdirector is responsible for administrative procedures related to the film and audiovisual companies, for supervising the film distribution in (Spanish) theatres and their marketing. The Subdirector also prepares statistics and reports (for instance, the annual reports on the Spanish film industry, on aids and funds granted, etc.).
- b) This Subdirector-General also manages the public funds for the production and exhibition sector. These include, among others, subsidies distributed by the ICAA, general production grants, also selective grants for feature and short films, aids for exhibitions (cinema theatres), and co-productions.

The Subdirector-General for Promotion and International Relations is responsible for the promotion of the Spanish film and audiovisual production in Spain and abroad. This covers the management of financial aids for the distribution sector and festivals.

This Subdirector is also responsible for the **institutional representation of Spanish cinema abroad**. As the representative of a Member State of the European Union, the ICAA represents Spain

¹³ Information based on the official webpage of the ICAA, cf. <https://www.culturaydeporte.gob.es/cultura/areas/cine/mc/pnc.html> (accessed in September of 2024).



in institutional decision-making bodies of the European Union or intergovernmental level, such as the Creative Europe Programme, the Eurimages Fund, the European Film Agency Directors association (EFAD) or the European Film Support and the Ibermedia Programme (in cooperation with other Ibero-American countries)¹⁴. Within this Subdirectorate, some of the working groups responsible for these areas are the Audiovisual Working Group of the Council, Groups of Experts on Cinema or the Contact Committee of the Audiovisual Media Services Directive.

This Subdirectorate-General also develops and coordinates public and social promotion activities, both in Spain and abroad. It organises the exhibitions of Spanish cinema abroad in collaboration with other institutions such as the annual film series on *Recent Spanish Cinema* in Los Angeles since 1994¹⁵; the *CineFiesta* in Lisbon since 2012; or, more recently, the *Day of Spanish Cinema* since 2021 (on 6 October). The Subdirectorate has collaborated since 2016 with the short film associations *Coordinadora del Cortometraje Español*, the *Asociación de la Industria del Cortometraje* and the *Plataforma Nuevos Realizadores* to develop the *Aulacorto* programme, which supports the dissemination of short films in schools and high schools. The Subdirectorate is also responsible for the organisation of conferences, meetings, seminars and other activities that connect industry and society in Spain and abroad.

A **Directorate of Marketing Policy** was created in 2010 to strengthen the Spanish film market. Contrary to the other Subdirectorates, this position was not originally filled by public servants, but by someone coming from the industry, Rafael Cabrera, who had experience working for the distribution company Filmax. The Directorate has been key in the development of the institute over the last decades, as it works closely with the Subdirectorate for Promotion in the organisation of cultural and industry events, in the promotion of the Spanish presence at festivals and in the development of marketing campaigns. The Directorate is also responsible for publishing catalogues and managing public relations of the institute.

Spanish National Film Archive (*Filmoteca Española*) is also part of the ICAA (also recognised as another Subdirectorate-General), although its focus (preservation, research and dissemination of Spanish cinematographic heritage) sets it apart from other branches of the institution. Its facilities (a Centre for Conservation and Restoration, a Centre for Cinematographic Research and

¹⁴ Ibermedia was created in 1995, during the V Cumbre Iberoamericana de Jefes de Estado y de Gobierno that took place in San Carlos de Bariloche, Argentina. The programme was finally launched in 1997 in Madrid to support the film and audiovisual industry across Ibero-America. The programme is currently managed by the Conferencia de Autoridades Cinematográficas Iberoamericanas (CACI) <https://www.programaibermedia.com/>

¹⁵ http://www.larecentspanishcinema.com/es/RS_About.asp



Administration, and the Doré cinema for the daily screenings of the institution) are separated, which gives it more independence in its everyday work.¹⁶

5.1.3. Policy and Funding

ICAA's main forms of support fall traditionally into the following three main categories: production, distribution, organisation of and participation in festivals and film events. Following the effects of the COVID-19 pandemic, two other areas have been also supported by the ICAA: support of cinemas and cinema-going for elders (since 2022) and development of audiovisual laboratories (since 2023). Both have been funded by the EU-Next Generation funds, a temporary economic recovery package developed by the European Commission to support the EU member states to recover from the COVID-19 pandemic.¹⁷

Thus, the origin of the ICAA's funding has two sources: a) its expenditure budget, coming from the General State Budget's Film Protection Fund and b) the Recovery, Transformation and Resilience Plan, financed with EU-Next Generation funds (this funding has been used mainly for the promotion of Spanish film productions at international events and support of audiovisual laboratories).

Taking 2023 as reference, the ICAA invested €95 million in the support of productions (for shorts and feature films, although in this case these amounted to only €3 million of the 95 total). €7 million were invested in distribution (3 of them allocated to international distribution). The support of and participation at film festivals amounted to €2.827.750. €24.5 million were spent in film exhibition, especially in the support of cinemas and cinema-going. The support of audiovisual laboratories received €9 million (see Ministerio, 2024, pp. 9–11).

In 2022, without the support of EU-funding, the total amount of the subsidies for production, distribution and promotion was €95,514,184.90. The next table offers a general overview of the evolution of the aids in the period under consideration.

Table 1. Subsidies yearly distributed by the ICAA (since 2006)¹⁸ / General State Budgets allocated to Cinematography/ICAA (Prior to 2006). Source: prepared by the authors.

Year	€ (thousands of)
2000	€42,072.780 (funds allocated in the General State Budgets)

¹⁶ <https://www.cultura.gob.es/cultura/areas/cine/mc/fe/portada.html>

¹⁷ https://commission.europa.eu/strategy-and-policy/eu-budget/eu-borrower-investor-relations/nextgenerationeu_en

¹⁸ <https://www.cultura.gob.es/cultura/areas/cine/mc/mac/2023.html>



Year	€ (thousands of)
2001	€43,913.53 (funds allocated in the General State Budgets)
2002	€53,059.80 (funds allocated in the General State Budgets)
2003	€45,823.75 (funds allocated in the General State Budgets)
2004	€41,011.60 (funds allocated in the General State Budgets)
2005	€77,980.54 (funds allocated in the General State Budgets)
2006	€79,861.43
2007	€61,218,417
2008	€67,794,378
2009	€75,792,761
2010	€81,068,318
2011	€70,510,936
2012	€44,475,309
2013	€33,846,550.94
2014	€61,694,369.02
2015	€42,245,439
2016	€67,118,071.13
2017	€70,342,905.74
2018	€109,537,327.00
2019	€47,886,704.74
2020	€67,679,423.70
2021	€77,079,197
2022	€97,097.52



REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.



In its support of national film and audiovisual production, one of the main objectives of the ICAA is to set the direction of the film policy in Spain and abroad, through its institutional action and the development of a legislation body. As part of the Ministry of Culture, the ICAA has been fundamental in the drafting of general film and audiovisual legal frameworks. The following pages offer keys to understand the ICAA's policies and funding, especially in the first fifteen years of the institution and how they affect its self-implemented understanding of competitiveness – the transformation since the late 1990s will be addressed separately in the next section of the report.

Beyond this structural context, the ICAA is also an institution **strategically influenced by the person in charge**. For the elaboration of these laws and policy lines, the agenda of each Director-General, his/her specific ideas about cinema, training and previous professional career have had a specific impact. The internal interests of the industry at each moment, the overall economic development and the supranational regulation have been other fundamental factors.

In its 38 years of existence, the ICAA has had 16 Director-Generals. From a more general perspective, left-wing governments (which cover 11 of these 16 appointments) have usually favoured professional profiles coming from the cinematographic field (filmmakers, screenwriters, critics or lawyers and media experts). In contrast to that, under conservative governments the position has been traditionally occupied by more technical profiles, usually senior civil state servants.

The first Director-General of the ICAA was the filmmaker Pilar Miró. She was responsible for the transformation of the former General Direction of Cinematography and responsible for the development and implementation of the first program of film subsidies set in democracy, commonly known by her own name (**Ley Miró, actually Law 3304/1983**). These subsidies had a clear protectionist goal, particularly for a specific type of “quality” cinema – middlebrow films with intellectual aspirations and high production values (Trenzado Romero, 1999, pp. 164–170). **The law worked with selective and anticipatory grants aimed at supporting the work of artistically ambitious filmmakers and high budget films**, both under Miró and Fernando Méndez-Leite, who followed her as head of the institution from 1986 and 1988. A new state subsidy was created to be paid in advance following the French model of *avances sur recette*. The law also foresaw the creation of a Film Protection Fund to cover this financing.

As Nuria Triana-Toribio points out (2016), directors and producers were meant under the new system to join forces to apply for subsidies by submitting their projects to a Subcommittee for Technical Valorisation. In a more contemporary evaluation, John Hopewell indicated how the new system:



“increased state funding and, crucially, channelled it into production investment rather than bonuses based on box office performance, thus assuaging the industry’s perennial cash-flow problems. Under the new system the government could advance up to 50 percent of a film’s estimated budget, repayable only through amounts calculated against percentages of subsequent box office takings: 15 per cent for any Spanish film, 25 per cent more for ‘Special Quality’ films, another 25 per cent more for films with budgets over pts. 55 million.” (Hopewell, 1986, p. 226)

The system was still built on *auteurist* premises. The legal changes were “designed to strengthen the film industry and to achieve a production culturally more valuable and commercially more competitive” (Miró quoted in Triana-Toribio, 2016, p. 29). Cultural and commercial ambitions went (at least in theory) hand in hand; the actual implementation was however problematic, and Spanish cinema experienced during the 1980s an important loss of popularity. As Fernández Blanco has shown (1998, pp. 50–51), the crisis had deeper roots: from 1968 to 1989 Spanish cinema had lost 95% of its audience and around 90% of its income. It was on the verge of disappearing.

Starting with Miró, but also under the different directors that followed, aid has been traditionally directed to the support of the production sector through the financing and amortisation of projects. **This focus on production was not unusual:** it was at the time in line with other similar funding schemes in Europe, and the two other examples in this report present specific variations on this approach. It was also logical from the perspective of the Ministry of Culture that saw in cinema an area of intervention mainly from an artistic and cultural point of view (and not from an industrial one).

This focus on production has led over the years to criticism from the other sectors, especially film distributors. It has also generated doubts about the effectiveness of this model in attracting the audience to national productions. Gradually, the purpose of the aid was refined. In addition to traditional production funding, grants were also envisaged for scripts, laboratories, etc. As previously mentioned, there was also support for short films, national and international distribution, festival participation, etc.; as well as for the preservation of film heritage, the implementation of new technologies, research and support of cinema theatres.

From 1989 onwards, the two Director-Generals of the ICAA Miguel Marías Franco (1988 to 1990) and his successor, Enrique Balmaseda Arias-Dávila (1990 to 1991), changed the direction of film policy towards a more intense promotion of **competitiveness**, back then **understood as commercial and market-driven film production**. To this end, selective and advanced subsidies were reduced; instead ‘automatic aids’ (those based directly on box office results) were increased,



and a new line of subsidies in support of distribution was also introduced. The ICAA under Marías and Balmaseda worked to adapt the national legal framework to the new guidelines of the European audiovisual market policy: the *Television Without Frontiers* directive (TVWF, 1989) and the MEDIA 92 program (1988) of the European Commission, as well as the *Eurimages Fund* (1989) of the Council of Europe.

During the 1990s the ICAA's policies continued along this same path. The Institute tried to increase the strength of the national film industry and the weight of private investment following the guidelines of the TVWF directive, whereas film funding still based on cultural criteria (in the more traditional sense of 'quality', as in the 1980s) lost some of its weight. The goals were also conditioned by the emergence of private television channels, cable television and media conglomerates (Green, 2022, pp. 100–103), which rapidly became key players in the production and distribution of Spanish cinema. Under Balmaseda (1990–1991), and in line with the MEDIA Program, televisions were now also called to participate in the creation through direct financing, and not only through broadcasting quotas.

Further steps in this reorientation towards economic priorities came a few years later, after a change of government (1996). Under the conservative party PP, José María Otero, a former writer, screenwriter and independent producer, stepped in at the head of the ICAA from 1996 to 2004. In those years the ICAA also implemented a digital control system of ticket sales that could streamline the process of obtaining data about box office results.

A new set of laws changed the model of automatic and complementary aids towards a more industry-oriented model. Production companies that did well at the box office were prone to receive a larger subsidy under the new system. The new measures also required these companies to invest some of their profits in film production. In addition, they were required to produce films through their own media conglomerates and in collaboration with independent producers (Green, 2022, pp. 93–96).

As in the previous transformations, this new emphasis on production reflected changes in the bigger picture: **the European Union's policies had, over the previous decade, focused on the transformation of the industry into a strategic sector and on making television a significant source of private funding.**



5.1.4. Outlook

Although a system of aid and subsidies had been gradually enforced in Spain since the early 1940s as part of a broader mechanism of control and guidance of the national film landscape, it was not until the mid-1980s that the Spanish state developed a modern, more comprehensive system of support for the national film industry. The ICAA, as part of the Ministry of Culture, was the central institution in this regard.

In comparison with other (mainly west) European references, the report states a late development of a modern film policy that was born at a crossroads between:

- The **rearrangement of the state institutions** following 40 years of dictatorship.
- A general **decrease of cinema's public presence**, that had broader roots than those strictly national (impact of VHS, television) and was affecting at the time almost all European nations in different degrees.
- A gradual **realignment of the national cultural policies along European** lines. On 1 January 1986 Spain (together with Portugal) joined the European Communities. ICAA's intervention in the film market had been already working towards this goal (trying to make national productions more competitive in a European context; whereas the focus seemed to be still in the prestige acquired by critical recognition); its main policy lines were from then on also to be interpreted as a reflection of more general European trends.

As previously noted, **ICAA's intervention was traditionally channelled towards the support of production**. This was not an anomaly in international terms and changed gradually over the next decades. Consequently, the Institute's relation to the idea of competitiveness must be first approached from a perspective originally dominated by the belief that **competitiveness was to be achieved by increasing the quality of the productions**¹⁹, which, in the context of an extremely atomized industry like the Spanish in the 1980s, usually meant higher production values, critical recognition, and bigger investments that had to be facilitated by the state.

The ICAA functioned in its first years as a **mediator** between the state's and the creator's interests. It is in this significant regard that its first two Director-Generals (Pilar Miró and Fernando Méndez-Leite) were film directors. Over the years, this mediating role was extended to incorporate the demands and necessities of the different industry stakeholders. In Spain, the industry has

¹⁹ On the specific roots of this idea of "quality" and its film historical roots see Triana-Toribio (2016) and Ramos Arenas (2021, pp. 12-31).



traditionally been very fragmented and financially weak, which has made this process challenging and resulted in confrontations between the three sectors (production, distribution and exhibition). **The development of a coherent, long-term film policy has been further hampered by the strong presence of US companies in the distribution sector, especially since the late 1970s.**

On more structural terms, one of the concerns already expressed in its first years is the lack of autonomy that the institution suffers regarding **personnel and internal structures (often considered too rigid to react to the market's dynamics)**, also the strong dependence on public funding that results in difficult implementation of policies (this situation aggravated especially after the global financial crisis of 2008, as it will be explored in the next chapter).

The institute's inception during the first social democratic government of the Spanish Socialist Worker's Party PSOE and its development during its first decade under governments of the same party have usually resulted in **accusations of politicisation of the institution**. In relation to the question of competitiveness, this usually results in the general assumption that the promotion of quality cinema corresponds to the progressive parties (which, according to their critics, results in different forms of ideological control of the content of the films); while a more competitive and industry-oriented cinema is more in line with the conservative parties. **The analysis of policy and legislation conducted in the next chapter will show however that, while there is general transformation of the institution towards more liberal, marked friendly policies, this cannot be simplified as a direct implementation of party politics.**

5.2. Polski Instytut Sztuki Filmowej (PISF)

5.2.1. Introduction

The following pages introduce the Polish Film Institute: they contextualise its foundations, to further explain its function and goals and offer specific information on its policy and funding, building on available data from the pre-PISF period of Poland's cinematography transformations, which is of potential value to understand today's institutional challenges.

The Polish Film Institute was established on August 19, 2005 under the Law on Cinematography (2005). It is a public cultural entity that supports the Polish film industry, at national and international levels. On the national level, these tasks include financial support and subsidy of Polish films; it also supports the international promotion of Polish productions, and the organisation of industry festivals



and other promotional events related to the Polish film visibility and promotion internationally. In addition, the PISF supports film education, the digitisation of audiovisual works, and the so-called modernisation of cinemas through new technologies and creates conditions for the universal digital access to the European film heritage. The activities of the Polish Film Institute are **financed from public funds, under the Ministry of Culture and National Heritage**. Currently, there are six main pillars or areas of intervention: 1) film production; 2) film education; 3) dissemination of film culture (i.e.: film festivals, film initiatives, film magazines, digital reconstruction, audiovisual market research); 4) cinema theatres; 5) international promotion of Polish film; 6) Polish-Ukrainian film initiatives (suspended in 2024).

The Polish Film Institute has had a significant impact on the development of the Polish film industry, as demonstrated by the international success of popular Polish films. A recent, notable example is *Ida* by Pawel Pawlikowski (2013), which gathered over 50 awards, including the first ever Polish Oscar for a Best Foreign Language Film. The Polish Film Institute played a crucial role in this success by supporting its production and enhancing promotional and distribution activities, helping *Ida* captivate millions of viewers globally. The film received €702,120.00 from the Polish Film Institute (its total budget was estimated at over €4,212,450.00) (SFP, 2016).

5.2.2. Function and goals; Structure

As laid down in the Cinematography Act of 2005, **the tasks of the Polish Film Institute** include creating conditions for the development of Polish film production and co-production, inspiring and supporting the development of all genres of Polish filmmaking, the so-called “artistic films” in particular. This involves tasks in relation to the development of film projects, film production, and film distribution. Moreover, the Institute aims at facilitating the universal access to Polish, European, and global film. To this end, it supports film debuts, the artistic development of young filmmakers, and promotes Polish filmmaking in general.

The Institute **co-finance projects in film production, distribution, and promotion, as well as the development of cinematographic infrastructure**. The PISF focuses on preserving and protecting film cultural heritage, provides expertise services to public administration bodies and supports the maintenance of film archives. Furthermore, the PISF supports the development of the Polish independent film industry, especially its small and medium-sized companies.

The Polish Film Institute prepares annual reports on its activities, which are used for its own purposes and for public administration, in particular for the Minister of Culture and National Heritage. It also



REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.



initiates and conducts research projects, develops and commissions analyses, and gathers expert opinions to diagnose and forecast the Institute's directions and future policies.

The management bodies of the Polish Film Institute are the Institute Council and the Institute Director.

The Council of the PISF comprises 11 individuals and includes delegates from filmmakers, film producers, cinematography-related trade unions, cinemas, distributors, broadcasters, cable TV operators, and digital platforms. The Minister of Culture and National Heritage appoints members of the Institute's Council for three years. The Council establishes the Institute's guiding principles and provides feedback on its yearly operational plans and reports, including financial statements. The Council's responsibilities include setting the directions for the Institute's activities. This involves approving the operational programs announced by the Director and the Institute's investments above €1,170,525.00. They also provide evaluations on the **annual plan of activities and the annual financial plan**. Additionally, the Council gives opinions on the annual report on the activities and the annual financial statements of the Institute, including formulating recommendations and postulates for the following year. It also provides opinions on proposals for changes in the statutes. Furthermore, the Council expresses statements, opinions, and conclusions to the Minister, other public administration bodies; the Director does it on all matters concerning the Institute and the national cinematography.

The key decision-making entities in addition to the council are the **Institute Director** (currently Karolina Rozwód), the **Deputy Director** and the **Chief Accountant**. The Director is responsible for overseeing the overall activities of the Institute, representing it externally, and making decisions on co-financed film projects based on the opinions of experts who evaluate the applications. The Director of the Polish Film Institute is also responsible for the appointment of the Oscar Committee, which selects the Polish candidate for the Best International Feature Film category at the Oscars Galas. The Institute also supports campaigns to improve the candidate's chances of making it to the Oscar shortlist. As part of this promotion, several screenings are organised, including those for representatives of the Academy of Motion Picture Arts and Sciences.

At the middle management level there is the following organisational departmentalisation: Department of Film Production and Development of Film Projects; Department of Film Culture Dissemination and Promotion; International Relations Department; Development Department; Media Communication Department; Finance and Accounting Department; Legal Department; Administrative and Economic Department; Personal Data Protection Officer.

Following its establishment (2005), the Institute's experts (specialists from the Polish film industry) were not systematically selected. Several meaningful changes were implemented over ten years –



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like the requirement for the experts to meet and negotiate their common opinion – and this changed the landscape of Polish Cinema. For example, the Institute established the Script Development Committee under the activities of one of the key operational programmes (Film Production) and, at the same time, allowed the applicants (film producers and screenwriters) to choose the experts to evaluate their projects.

Table 2. Tasks and activities of the departments at the PISF. Source: prepared by the authors on the basis of <https://pisf.pl/struktura/> data [access: 12.10.2024].²⁰

²⁰ All translations of original Polish documents, including those of the interviews conducted during the research project, are by Michał Głowacki.



Department	Tasks and activities
Film Production and Film Project Development Department	• support of film production, including script work, project development • contracts and subsidies for feature films, documentaries, animations, and international co-productions • film financing, co-production agreements, and production schedules • the audiovisual production support system, known as incentives, since 2019
Department of Film Culture Dissemination and Promotion	• financial support to important film festivals and reviews • financial support to the digital restoration of films, activities of Film Discussion Clubs • financial support to modernisation and digitisation of cinemas • regional and local government cooperation, support training for the film industry • market research for the audiovisual industry • patronage activities and collaboration on events • reporting of attendance data from cinemas to the Institute as required by Article 19a of the Cinematography Act
International Relations Department	• promotion of the Polish film industry internationally and fostering international cooperation • submission of Polish films to international film festivals • participation in international film events with the participation of Polish and foreign filmmakers (the Operational Programme for the Promotion of Polish Film Abroad)
Development Department	• technical support in the field of communication and IT at the Institute • security of ICT systems, and collaboration in managing the Polish Film Institute's websites
Media Communication Department	• media contacts, informing about the Institute's activities • coordination of the www.pisf.pl website, the Polish Film Institute's social media



	organising of press conferences and other media meetings, and publishing the Public Information Bulletin
Finance and Accounting Department	- accounting and financial reporting, annual financial plans for the Institute - financial support for Operational Programs - processing payments to the Polish Film Institute under the Cinematography Act
Legal Department	legal services
Administrative and Economic Department	office management, including overseeing fixed assets, maintaining company archives, public procurement procedures, and the procurement process
Data Protection Officer	- compliance with the General Data Protection Regulation (GDPR) - processing of personal data and the data subjects' rights

Overall, it is a challenge to determine the number of employees at the Polish Film Institute, as there is no official data. The lack of such information challenges the transparency policies of a public body funded and regulated by the state. Media and fact-checking organisations, such as the watchdog organisation Civic Network, have been interested in obtaining public information about the Polish Film Institute since 2016. After many months of silence from the Polish Film Institute, the organisation filed a complaint for inaction, in order for it to provide some information, such as a list of its experts, civil law contracts, and a financial plan. However, the organisation "received an answer indicating that, in the Institute's opinion, the names of employees, their positions, salaries, and education should remain unknown" (Newelska, 2019). This led to legal action, which lasted several years. In 2019, the case remained unresolved – there is no data on further proceedings.

In 2018, the Ministry of Culture and National Heritage commissioned an independent audit of the Polish Film Institute (PISF) for the years 2016-2017, during which Magdalena Sroka served as the director. The audit report uncovered several irregularities, particularly concerning the hiring of family members, the roles they occupied within the organization (such as 'stamp designer' or 'independent



manager'), and the ambiguous process for awarding bonuses (Baran, 2018). The report indicates that nearly half of the employees – 30 individuals – were related by family ties, suggesting that in 2018, PISF employed approximately 60 individuals under formal contracts (not freelance agreements).

The then newly appointed Director of the Institute, Radosław Śmigulski, criticised the nepotism at the core of the institution, emphasising that "there are a number of shortcomings at the Polish Film Institute, which individually may not cause significant concern, but when combined in one institution, it creates a situation of absolute organisational and structural chaos" (Dziennik.pl, 2018).

5.2.3. Policy and Funding

Unlike the Spanish and Finnish examples, the Polish Film Institute receives its funding from various sources as per the Cinematography Act of June 30, 2005. These sources include subsidies from the Ministry of Culture and National Heritage, targeted subsidies from the state budget for investment tasks, revenues from film exploitation, donations, inheritances, and income from the Institute's assets (revenue from the exploitation of films in which the Institute has copyrights), funds from the Culture Promotion Fund, and a public fee collected under Article 19 of the Cinematography Act.

The Polish Film Institute (PISF) is the most relevant public entity in the national application process for film production funding. It is responsible for around 80% of financial support of film productions in Poland.

Table 3. Yearly film budget by PISF (since 2007). Source: prepared by the authors on the basis of <https://pisf.pl/budzet/> (2024d) data.

Year	Budget in PLN millions	Budget in EUR millions (1 PLN = 0,23 EUR)
2007	98,114,025.74	22,960,340.15
2008	100,097,888.37	23,424,597.53
2009	113,559,379.18	26,574,813.88
2010	113,359,597.14	26,528,061.51
2011	122,891,820.90	28,758,762.96
2012	171,496,637.71	40,133,111.52
2013	179,705,390.86	42,054,098.48



2014	178,576,447.42	41,789,906.64
2015	168,093,921.71	39,336,818.47
2016	168,219,096.12	39,366,111.39
2017	176,851,499.68	41,386,239.72
2018	236,334,177.05	55,306,191.48
2019	252,077,560.86	58,990,409.35
2020	263,177,425.58	61,587,965.28
2021	342,933,202.31	80,252,164.91
2022	424,290,212.82	99,291,080.30
2023	463,643,826.22	108,500,490.92

The Polish Film Institute provides financial support throughout several stages of a film project, including script creation, project advancement, and film production. Financial support is allocated to individuals involved in the screenwriting and the production of films.

In the 2023 financial report for PISF, the total amount allocated to the organisation's operational programs was PLN202,020,039.93 (€47,290,871.15), out of a total budget of PLN456,571,181.86 (€106,878,747.96) (PISF, 2024d). Notably, the operational allocation plan indicated that the planned amount for operational activities was PLN 160 million (€37,456,000.00). A detailed distribution of the planned funds for 2023 can be found in Table 4.

Table 4. Funds planned for the implementation of PISF operational programmes in 2023. Source: prepared by the authors on the basis of PISF data, <https://pisf.pl/wp-content/uploads/2023/01/PO-PISF-2023.pdf> (2023b) [access: 20.11.2024].

Operational actions	Total in PLN millions	Total in EUR millions (1 PLN = 0,23 EUR)
Film production	115	26,911,943.50
Promotion of Polish film abroad	8	1,872,135.20
Disseminating film culture	16	3,744,270.40
Film education	6	1,404,101.40
Developing cinemas	5	1,170,084.50
Polish-Ukrainian film initiatives	5	1,170,084.50
Awards, experts, others	5	1,170,084.50
SUM	160	37.442.704,00



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The difference between the planned funds and the excess reported in the final annual report may result from monetary inflation, which has been influenced by factors such as the COVID-19 pandemic and Russia's aggression against neighbouring Ukraine. While the PISF's annual report for 2023 does not specify the amount of money allocated to individual operational programmes – only providing the total sum – it does include a category titled "Costs of Assumed Reserves." This category amounts to €15,590.09 (PISF, 2023a) and contributed to exceeding the planned budget for the operational programs (PISF, 2024d).

The second highest fund investment by the Institute amounted to PLN126,881,190.83 (€29,698,445.93) and was designated for the program titled "Implementation of the Act on Financial Support for Audiovisual Production". (PISF, 2023a) This support system, known as "Incentives" (PISF, 2024e), is governed by the Act on Financial Support for Audiovisual Production (2018) and the Ordinance issued by the Minister of Culture and National Heritage (2019), which took effect on February 11, 2019. The primary benefit of this system is the reimbursement of 30% of the production costs incurred within Poland.

Additionally, it's important to note that the Act of March 31, 2020, which amended the Act on special solutions for preventing and combating COVID-19 and other infectious diseases, also modified the content of the Act passed on November 9, 2018 (Ordinance of the Minister of Culture, Heritage, and Sports, 2020).

The Institute also supports the growth of the Polish film industry by providing financial support to organisations that promote film culture and Polish cinema both domestically and internationally. Additionally, the Institute assists organisers of film festivals, schools, and film universities. Furthermore, it provides financial resources to enhance the technological capabilities and digitalisation of cinema facilities, as well as for the restoration and preservation of Polish cinematographic works, along with the provision of professional development opportunities.

The funds for supporting audiovisual production come directly from the state budget and are distributed throughout the year until they are used up. At least 10% of the annual budget is allocated to support animated productions.

The main responsibility of the Polish Film Institute is to **provide funding for film production, education, promotion of film culture, cinema development, and foreign promotion of Polish cinematography through Operational Programmes**. These programmes determine the scope of



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state aid, eligible applicants, and types of supported activities. For instance, in 2024, the Polish Film Institute administered six Operational Programmes: Film Production, Film Education, Dissemination of Film Culture, Promotion of Polish Film Abroad, Cinema Development and Polish-Ukrainian Film Initiatives (suspended in 2024).

Other forms of financial support operated by the institute include the **30 % Cash Rebate incentives** for filmmakers. These were introduced in February 2019, are **governed by the Act on Financial Support for Audiovisual Production** and offer a 30% reimbursement of production costs incurred in Poland as part of the eligible expenditure (PISF, 2021). Reimbursement is available for feature films, animated films, documentaries, and series, including feature, animated, and documentary series. The refund is available for both Polish and international productions, as well as services provided for foreign productions (referred to as "services"). However, a cultural placement test and minimum spending thresholds apply. Additionally, there are limits per project and per applicant.

Another example of financial support was the project **"Digital restoration and digitisation of Polish feature films, documentaries, and animations"** aimed to ensure access to Polish film heritage across all distribution platforms and preserve it for future generations (PISF, 2022a). The project was carried out from 2017 to 2021 by the Polish Film Institute in collaboration with the Documentary and Feature Film Studio and the Animated Film Studio from Bielsko-Biała. The goal was to digitise and make accessible the resources of Polish cinematography. Under the Digital Poland project, 160 feature films, 71 documentaries, 464 animated films, and 10 full-length animated films were restored. Additionally, 3,108 chronicles of the Polish Film Chronicle²¹ were digitised. The digital restoration and digitisation efforts included works by directors such as Andrzej Munk, Juliusz Machulski, Krzysztof Zanussi and Jerzy Kalina.

The Polish Film Institute is also engaged in recognising and rewarding significant contributions to the promotion of Polish cinema through its cash prize awards. Since 2008, as part of the Polish Film Festival in Gdynia, the Institute has been presenting the Polish Film Institute Awards in 9 categories: Cinema, Film Event, Promotion of Polish Film Abroad, Film Criticism, Film Education, Film Book, Distribution of Polish Film, Film Discussion Club, and Film Poster. These awards honour individuals and institutions that have played a key role in advancing film culture, supporting Polish cinema, and enhancing access to Polish filmmaking. Cultural institutions, film schools, local authorities, non-

²¹ The Polish Film Chronicle [Polska Kronika Filmowa] was a weekly newsreel, broadcast from 1 December 1944 to 28 December 1994, preceding the screening of films in Polish cinemas.



governmental cultural institutions, and other entities in the cultural sector have the opportunity to nominate candidates.

5.2.4. Outlook

The overall assessment of the Polish Film Institute's performance needs to be read considering the goals and practical implementation of the values aiming to support the national film industry.

On the surface, the PISF does not differentiate itself much from other European film agencies. It plays a central role in production, distribution and promotion activities, alongside support for international collaborations. Approximately 80 percent of all the funding support schemes for Polish movies have been distributed via PISF with growing support through the annual budget allocated by the state. As one of Poland's interviewees mentioned:

“[PISF] is not just an institution or a legal person, but it is the entity that in some way sets strategic directions or goals [for the Polish film industry] (PINT2)”.

At the same time, the Polish Film Institute operates as a public body with a rigid organisational structure and departmentalisation typical of a bureaucratic organisation. With two main consequences: While it is difficult to assess the number of employees and provide detailed information on its organisational chart, there is an **ongoing concern about how the rigid structure and hierarchies of the institution** might limit the PISF in its daily work activities. In addition to this, insufficient transparency and news on nepotism in its structures shall be addressed to fully understand the cultural fabric of this organisation.

Overall, another critical challenge has been its stability and long-term orientations and strategies in light of its relationship with the political power. Having been established as a public institution and funded through the budget by the Ministry of Culture and National Heritage, the Polish Film Institute has been **criticised for its lack of independence from the political powers**. The analysis in the next chapter takes into account the cultural path-dependencies to address controversies over selected funding schemes and decisions. These controversies can be read along the tensions between the so-called conservative and liberal values between two key political parties and their governments in power since the creation of the PISF.



5.3. Suomen elokuvasäätiö (Finnish Film Foundation, FFF)

5.3.1. Introduction

The Finnish Film Foundation (hereafter the Foundation) is a private law foundation and the main funder of the Finnish film industry. The independent foundation operates under the supervision of the Department for Cultural Policy of the Ministry of Education and Culture. It is guided by the State Aid Act, The Film Promotion Act and Decree, and the European Commission notification on state funding for film (FFF, n.d.).

The current law entered into force in 2019 and it repealed the previous law on the promotion of cinematography, enacted in 2000 (Suuronen, 2021). The Foundation receives its funding through the Ministry of Education and Culture from lottery (Veikkaus LLC) and pool funds allocated for promoting film art (FFF, n.d.). It must lobby for the annual allowance from the Ministry (Mäkelä, 2017, p. 67).

The Foundation was established in 1969. The founding partners were the Ministry of Education and three central organisations of the film industry, the Finnish Film Cinema Owners' Association, the Finnish Film Offices' Association (film distributors), and the Finnish Film Manufacturers' Association (filmmakers) (Suuronen, 2021). As film industries elsewhere in Europe, in the 1960s the Finnish film industry was in crisis. The 1940s and 1950s had been the best decades for the Finnish film industry so far, but during the 1960s cinema attendance and the number of cinemas decreased. The main reason for the crisis was the growing popularity of television. Yle, the Finnish Public Service Media Company, had started regular television broadcasts in 1958 and the number of television sets in private households had increased since. A sign of the crisis was also the bankruptcy of the major production company, Suomen Filmitöollisuus, in 1965. In the Nordic countries, the founding of national film institutes and foundations was a response to this crisis of commercial cinema (Kinnunen 2019, p. 7 and pp. 11–12).

Before establishing the Foundation, the Finnish state had hardly supported film production.

The only form of financial support had been a prize launched in 1961, which was awarded for finished films, but the prize had limited effects in the industry as a whole. The operating model of the Swedish Film Institute, which had been founded in 1963, was seen as a good solution in this situation. The Foundation had originally supported film production with loans and grants (Kinnunen, 2019, pp. 11–19 and 31–32) and it was initially intended as a temporary solution for a period of five years (until 1974). As in the other institutions analysed in the report, the foundation's activities rapidly became a



political issue. The 1970s has been described as “the crazy 70s of film politics” (Pantti, 2000, 271). However, the Foundation continued to operate after 1974 with slight transformations. The most significant change was that it started to receive an allowance from the state. Until then, it had operated with the support of the foundation tax: cinemas had to pay four per cent of film ticket revenues to the Foundation. This changed in 1977, when the government started to support the Foundation and it was able to provide significant financial support to film productions (Mäkelä, 2017, p. 36; Suuronen, 2021). From 1980 onwards filmmakers did not have to repay any of the funds granted.²²

5.3.2. Function and goals; Structure

The second section of the Film Promotion Act states the aims of the Foundation, which are:

“to promote 1) diverse and professional domestic film production, 2) extensive and encompassing supply and distribution of film, 3) the internationalisation of domestic cinema and its creators, and 4) film culture and its development. The starting points for realising these aims are participation, pluralism, cultural diversity, and the freedom of art.” (FINLEX 1174/2018)²³.

More recently, the Foundation’s strategy (2018b) for the years 2018–2023 summarises its tasks as follows:

“[The foundation] **supports** professional production of films and television series and their diversity and accessibility everywhere in Finland in all kinds of distribution channels; **accelerates** the internationalisation of the Finnish film industry; **follows** and studies the development of the field and participates in the international development work of the field; **communicates** and conducts a dialogue about the development and the prerequisites for operation with industry operators and stakeholders; **promotes** fair and equal operation culture in the film industry.” (Emphasis in original.)

The Foundation does not pursue financial gain or other self-interest. According to Kalle Kinnunen, who has written the Foundation’s history, “it aims to make the film sector thrive” (2019, p. 9). Väinö Mäkelä (2017, pp. 64–65) describes the Foundation’s role in terms of ecosystem approach as follows: “the Foundation’s only mission business wise, is to make the industry thrive and nurture the

²² Mervi Pantti (2000) discusses Finnish film politics during the period of independence until 2000 in detail in her dissertation.

²³ From now on, all translations in the Finnish part are by Kaisa Hiltunen.



ecosystem (...) it shares information and in this sense spurs economic growth in the ecosystem, without directly competing with other ecosystem members.”

In concrete terms, the Foundation supports filmmaking in its separate phases through screenwriting grants, development support, slate development support, production support, exhibition and distribution support, and international promotion (FFF, n.d.).

Today the Foundation is governed by the **managing board** nominated by the Ministry of Education and Culture and by the CEO, appointed by the board for four years at a time. The board is nominated for a term of three calendar years, and it has 5 to 8 members. According to the current film law, film professionals and representatives of the film industry cannot be members of the board. The board is responsible for approving the Foundation’s rules, procedure, yearly strategy, and support guidelines among other things. It also signs off on all support decisions presented by the Foundation. The board appoints and dismisses the CEO. The Foundation also has an **advisory board**, which was established in 2019 to meet the aims of the new film law, the Film Promotion Act (2019), and to strengthen cooperation with the film industry. The managing board appoints the members of the advisory board.²⁴ The advisory board is also nominated for a period of three calendar years and its members represent film authorities and the beneficiaries of the Foundation (FFF, n.d.; Kinnunen 2019, 138.)

There are currently 29 people working as employees of the Foundation. The Foundation is led by a chief executive officer. The current CEO, Lasse Saarinen (since 2016) is the sixth leader of the Foundation. The Foundation is divided into the following departments (with the current number of personnel in parentheses): Administration (7), Production (10), Exhibition and Distribution (1), International Promotion (6), Communication and Research (3), Kino K 13 (2).

The **administration** department is led by the head of administration. The rest of the department is made up of a special advisor to management, a system administrator, an office coordinator, an accounting specialist, a property manager, and a non-military serviceman (a temporary member of

²⁴ In 1995 the Foundation went through a similar organisational change, but at that time power was shifted away from the board. Until 1995, the board, which consisted of industry professionals, had made the production support decisions. With the organisational change, more power was shifted to the CEO and the head of production.

According to Mäkelä, shifting power to individuals was believed to lead to more “responsible” production support decisions. The fact that industry people were involved in the production decisions had caused tension and unwanted competition. The same year the Foundation started developing the production support system. The system where the producers had had to return funds to the Foundation based on their film’s box office performance was replaced with an incentive system that rewarded the producers for taking bigger risks (Mäkelä, 2017, p. 41). During this time the Foundation was led by CEO Jouni Mykkänen (1995–2006).



the personnel). The **production** department is led by the head of production under whom work six film commissioners, one production controller and two production coordinators. Film commissioners have focus areas. Two of them work on short fiction, two on long fiction, and two on documentaries and series. An exhibition and distribution specialist also works under the head of production.

The **international** department is led by the head, under whom three advisors work, one for feature films, one for documentary films and one for short films, plus a festival coordinator (the specific areas of intervention of this department will be specified in the next subchapter). The international department conducts a rigorous assessment of films, evaluating their potential for success in international markets. “It is pointless to keep all movies intended for the domestic market as an extension of the catalogue. We also have to do some sort of curating” (FINT3). Comedies designed for national audiences, such as *Lapland Odyssey 4* (Wuolijoki, 2022), were cited as examples of films that are typically not deemed suitable for international promotion (FINT4). Despite the necessity for certain forms of curation, the objective is to promote as many films as possible. The necessity for open discourse and the importance of enabling filmmakers to reflect independently on the potential of their films was underscored by the representatives of the department. The advisors’ role is that of an intermediary between the Finnish filmmakers and producers, on the one hand, and international sellers and distributors, on the other (FINT4, 5).

The **communication and research** department is fronted by the head of communications under whom work a communications specialist as well as a statistics and research specialist. The Foundation also has a cinema on its premises, the K 13 cinema. Two people work at the cinema, a cinema manager and a cinema assistant.

Moreover, two people working for Creative Europe’s MEDIA programme, an executive manager and an information officer, work at the premises of the Foundation in close collaboration with the Foundation’s experts. MEDIA Desk Finland is responsible for information and advice on the MEDIA programme in Finland. The representatives of The Finnish Creative Europe MEDIA provide information about the Media sub-programme in Finland. The Foundation is one of the sponsors of Nordic Film & TV Fund, which supports Nordic film and series and Nordic co-productions through top-financing.



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5.3.3. Policy and Funding

The different forms of support granted by the Foundation fall into the following main categories: scriptwriting grant, support for production, support for distribution, support for cinemas, support for international promotion, and support for the promotion of other film culture.

Support for production is divided into development support, slate development support, production support, and production support 50/50.²⁵ The different forms of distribution support are marketing and distribution support for feature fiction films, documentary films and short films, film import support, operational support for film festivals, and training support. Support for cinemas (exhibition support) includes regional, operational support for cinemas, support for cinema equipment and modernisation, and training support.

Support for international promotion includes project support for international promotion, material and marketing support for international promotion (sometimes also referred to as international distribution support) and travel support for international promotion.

The **production department** processes applications for support, but the final decisions on which projects to fund are made by the board. The CEO presents the department's proposals to the board.

In 2023 the total amount of support granted by the Foundation was €23,573,660 which was less than in the five previous years (see Table 1). The percentages for different forms of support were as follows: total support for production 74.9%; total of distribution support 10.7%; total of exhibition support 5.3%; scriptwriting grant 3.5%; total of international promotion support 2.5%; festival support 2.5% and promotion of other film culture 0.5%. As in the other case studies, production subsidies make up the majority of the subsidies distributed by the Foundation. "Other film culture" means projects that help strengthen Finnish film culture and industry, such as research and the development of an equality tool for film industry (FFF, 2023b, p. 7).

²⁵ Because the Foundation's allowance had not increased as expected, it sought ways to increase the amount of private financing for Finnish film. One major step in this was the 50/50 production support, launched in 2011. It means that if a production company has been able to secure half of the funding from elsewhere, the Foundation will give the rest (Kinnunen, 2017, p. 120; Mäkelä, 2017, p. 60).



Table 5. Total amount of subsidies granted by the Finnish Film Foundation since 2000. Source: prepared by the authors.

Year	Amount €
2000	FIM (Finnish mark)64,137,345
2001	10,327,517
2002	10,477,215
2003	11,339,556
2004	12,793,581
2005	13,254,276
2006	14,254,636
2007	13,875,795
2008	15,853,606
2009	23,016,727
2010	23,768,122
2011	26,169,138
2012	26,713,794
2013	23,737,902
2014	24,450,309
2015	25,525,059
2016	23,122,510
2017	23,191,447
2018	24,058,156
2019	24,757,717
2020	31,135,280
2021	36,324,991
2022	25,107,101
2023	23,573,660



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Focusing now on the weight of the Foundation within the Finnish film industry, in 2023 41% of production financing for Finnish feature-length fiction came from the Foundation. For documentary films the Foundation's share was 45%. In 2013 the percentages were 47% and 43%. In 2009 the percentages were 34% and 33% and in 2004 30% for feature-length fiction. Information for documentaries is not available before the year 2009. In 2022 the Foundation's budget for cultural export (i.e., international promotion) was €697,700 (see Table 5).

Table 6. Support for cultural export or international promotion granted by the Finnish Film Foundation. Source: Finnish Film Foundation, *Facts & Figures* publications from 1999 to 2023. For the years 1999–2008 the share of the budget was not available.

Year	€	share of the budget (%)
1999	FIM (Finnish mark)1,344,121	N/A
2000	FIM1,466,618	N/A
2001	251,854	N/A
2002	249,585	N/A
2003	251,153	N/A
2004	250,766	N/A
2005	338,275	N/A
2006	344,864	N/A
2007	350,641	N/A
2008	405,525	N/A
2009	481,679	3
2010	553,905	3
2011	660,059	3
2012	660,686	2
2013	826,588	4
2014	743,944	3
2015	781,084	3
2016	638,420	3
2017	687,424	3



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2018	687,580	2.3
2019	564,678	2.7
2020	771,249	2
2021	685,581	1.9
2022	697,700	2.8
2023	579,925	2.5

The Foundation's Head of Production is Finland's representative in Eurimages. The Foundation also collaborates with the New Dawn Fund, which promotes inclusion and equality by supporting feature-length fiction and documentary productions of filmmakers from discriminated groups. The Foundation finances the International Sámi Film Institute, which promotes Sámi-language film production in the Sápmi, the area in the northern parts of Norway, Sweden, Finland and Russia that has traditionally been inhabited by the Sámi people.

This data clearly shows that the main objective of the Foundation is to support all types of Finnish films and promote them in Finland. The impact of the Foundation in the Finnish audiovisual landscape is prominent because it is the main funding organisation of Finnish cinema. For example, in 2023 the Foundation granted production support to 41 Finnish feature-length films (including seven minority co-productions) (FFF, 2024a), and, according to National Audiovisual Institute's Elonet database, the total number of feature-length films produced in Finland in 2023 was 49: in other words, most feature-length films produced in Finland have received production support from the Foundation (it is likely that some privately financed feature films in Finland are missing from these statistics).

Finnish film expert Petri Kempainen (2024, p. 38) describes the significance of the Foundation's support for cinema in Finland:

“Culturally based support for film production has, despite the relative smallness of the Finnish Film Foundation's allocation, secured both the creation of films for the general audience in Finland and the development and production of art house films, documentaries, and short films. In recent years, art house films, which have had great international sales success and which have also gained popularity among domestic viewers have also been produced.”



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The Foundation's mission is also to **collect and share information about the film industry in Finland**. To this end, the Foundation produces an annual publication, *Facts & Figures*, which contains a wealth of statistical information. Additional information is available on the Foundation's website, for instance the support decisions and audience numbers for individual films. The Foundation is also active on social media channels, especially Facebook. Furthermore, its tasks include taking care of the cinema network to ensure the possibility of watching films in cinemas all around the country.

The Foundation also supports other forms of film culture, such as projects that aim to strengthen and diversify it domestically. Such supported projects included in 2023 a pitching event, a gender equality tool, the Jussi Film Award gala ("Finland's Oscars") and various programmes at film festivals.

A good example of the Foundation's significance for the domestic cinema scene is its role in the digitalisation of the Finnish cinemas. Since the early 2000s the Foundation had been actively involved in the planning of the digitisation of the Finnish film industry, and it eventually assumed project's main responsibility. Digitisation was completed by the year 2013 (Kinnunen, 2019, pp. 114–117; Mäkelä, 2017, p. 55). The savings resulting from digitisation were channelled into marketing, training, and research (Mäkelä, 2017, p. 63).

In 2021 the Ministry of Education and Culture started a development project to consider the establishment of a new major cultural agency and the subsumption of the Foundation under it. The Foundation expressed its concern about this plan because it would threaten the Foundation's independent existence and might affect its funding as well (FFF, 2023b; 2023c). The final report of the development project states that the Foundation does not consider the possibility of joining the agency (Ministry of Education and Culture, 2022, p. 28). At the end of 2023, the Ministry announced that it had abandoned this idea and that the Foundation's operations would continue as before (FFF, 2024b, p. 7).

As in the previous examples in Spain and Poland, **international operations are key in the activities of the Foundation**. They are divided into different departments, although only one is designated as an "international department". The production department is, for instance, responsible as well for the decisions regarding international co-productions and therefore operates a lot in the international scene.

The Foundation's international department works on finished films that have received production support from the Foundation. International promotion, or cultural export, a term that often appears in



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the Foundation's documents, refers to two types of activities: activities aimed at furthering the sales and distribution of films abroad, and activities aimed at general promotion and visibility of films. In other words, it covers commercial and other non-commercial forms of export, that is, promoting Finnish art and culture and creating networks. In practice, cultural export means, for example, organising Finnish film weeks abroad with the help of local partners such as distributors, cinemas, or Finnish embassies. According to the Foundation, an efficient promotion of Finnish cinema needs to take both into account (FFF 2011, pp. 18–19).

The Foundation helps producers and filmmakers “on issues related to internationalisation in all stages of filmmaking” (FFF, n.d.). The three support schemes for international promotion mentioned above are: project support (including international distribution), material and marketing support and travel grants. Project support is meant for the export of Finnish films, for launching a film at a festival (only prominent international festivals are accepted) or digitising films for festivals or export projects. Material and marketing support is meant for the manufacturing costs of international screening copies, preparing marketing materials and other operations aimed at supporting internationalisation (FFF, n.d.; FFF, 2021b.) The support includes helping filmmakers network internationally and the organisation of international training programmes in cooperation with education programmes.

In practice, the international department focuses on taking Finnish films to international festivals. The aim is to ensure Finnish films presence on as many important international festivals as possible (see for example Lehtisalo, 2016; FFF, n.d.). The Foundation co-operates with sales companies and production companies to create a festival strategy for films and it delivers screening copies to festivals. Moreover, it arranges Finnish film weeks, showcases, pitching events, and various other networking events all around the world in cooperation with local partners such as cinemas, Finnish embassies, Finnish cultural institutes, and other cultural institutions. Additionally, the strategy entails extending invitations to distributors and film buyers to prominent festivals in Finland, including the Helsinki International Film Festival, the Midnight Sun Film Festival, the Tampere Short Film Festival, and DocPoint (FINT4, a representative of the Finnish Film Foundation). The Foundation also publishes an international newsletter, which includes information about upcoming Finnish films (FFF, n.d.).

The Foundation's international department promotes the selling of Finnish films abroad by granting support for their international distribution, but does not sell films itself. The condition for international distribution support is that the film has received production support from the Foundation. One of the most recent forms of said support, launched in 2021, is related to the international theatrical



distribution of Finnish films. The support can also be granted to the VOD distribution of films “for well-founded reasons” (FFF, n.d.). The Foundation helps Finnish production companies find international partners and financing for their films. The main international partners in this are Creative Europe, Nordic Film & TV Fund, Eurimages, New Dawn Fund, and International Sámi Film Institute (FFF, n.d.).

The Foundation also grants production support to international majority and minority co-productions that have a Finnish co-producing partner. Funded co-productions must have some form of distribution in Finland, Finnish technical or artistic input and the film must be of relevance for Finnish audiences (FFF, n.d.).

The COVID-19 pandemic hampered the international sales of films and slowed down the launching of theatrical distribution all around the world. In response, the Foundation launched in autumn 2021 a nonrecurring support instrument that aimed to promote the commercial distribution of Finnish films abroad.

In addition to co-operation in the fields of financing and training, the Foundation works closely with several international organisations to develop the film industry. These include European Film Agency Directors (EFAD), European Film Agency Research Network (EFARN), The Five Nordics (previously called Scandinavian Films), European Film Promotion (EFP), European Film Awards and The Nordic Council Film Prize (FFF, 2023).

5.3.4. Outlook

The establishment of the Finnish Film Foundation in 1969 marked the beginning of systematic public support for Finnish cinema. Film started to be seen as something to be cherished in the age of television and in need of support already in the production phase. The first years of the Foundation were difficult and its activities were criticised throughout the 1970s. Its governance was accused of being undemocratic and supportive of biased decisions. Although the Foundation was a political bone of contention for years, it managed to remain a foundation. The crucial stage was that the Foundation started to receive funding from the state. **The Foundation’s grant funding grew rapidly in the 1980s, only to fall during the recession of the 1990s. In the 1980s the Foundation was criticised, also by filmmakers, for its policy of funding artistic films instead of popular films preferred by the audience.**

The situation changed profoundly for the better in the late 1990s. The new leadership had fostered relations with the government and as a result the budget increased. The application for production



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aid was reorganised and many other reforms took place. The law on the promotion of cinema also came into force in 2000. **The boom of Finnish cinema that took place in the late 1990s** is crucial for the analysis in the following section. These and other developments, such as the support from the EU's MEDIA programme led to the professionalisation of the film industry. **Although the Foundation had developed international relations since the 1970s, a significant change in this area came only after 2010; since then** the Foundation has adopted an increasingly varied role in the Finnish film industry. It has been described as a key player in the Finnish cinema ecosystem (Mäkelä, 2017), and its forms of support have increased. The Foundation itself has not been at the centre of much controversy over the past decade, although the film industry has had its fair share of controversies in which the Foundation has had to take a stand because of its central role.

The Film Foundation's budget has stagnated and negotiations with the Ministry of Education and Culture have not produced the desired results. The Foundation has tried to make the government understand that the support given to the film industry is returned to the state many times over. **In other words, the importance of film as a source of income for the state is again being emphasised.** Today, the Foundation is struggling with a diminishing allowance, but at the same time it continues to diversify its operations.



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6. ANALYSIS

This section explores the transformation of the national film agencies, the policies' impact and their adaptation to the national contexts and how these relate to the concepts of European and competitiveness in the last 25 years.

In each of the case studies, the analysis follows the set of subjects that have already been covered in the introductory part and further adapted to each case study in the previous chapter. The actual structure of the analysis will however vary, reflecting the particularities of the three examples (their different functions and areas of intervention, the challenges they face) as well as the information available. This implies that, for instance, in the Spanish and Polish case more research literature was available, which made it possible to write a more detailed historical account. In the Finnish case, less written sources were at hand and therefore the research was to a greater extent based on the interviews, which have provided more fragmentary and subjective views on the past years.

Each case studies present sections that help structure the comparative, diachronic approach. Two further sections on competitiveness and outlook further underline the comparison: the first provides a reflection on the transformation of the agencies' idea of competitiveness; the second offers a look at recent developments and future scenarios.

6.1. Spain

The history of Spanish film policy in general and of the ICAA in particular has been usually read as a reflection of political changes. Based on the analysis of its documents and policies, reflecting the insights provided by the interviews, and considering the growing weight of the EU legal and policy frame, this report presents another approach more interested in stressing the constant *transformation*, but also the institutional *continuity* over the last 25 years.

In line with the diachronic approach of this study, the process illustrated in the following pages will cover the evolution of the ICAA considering the specific implementation of film policies and legislation, the way these were adapted to the particularities of the national film market as a concept of competitiveness was gaining new profiles that reflected financial, cultural and political interests. The focus, as in the other case studies, lies on **five areas of analysis: the internal functioning of the institution; the weight of promotion and its challenges; ideas about competitiveness both regarding national and European cinema; values guiding the work of the ICAA and future scenarios.**



For analytical purposes, three periods have been drafted: (1997–2006; 2007–2019 and 2020–today). The first one is presented as a period of institutional consolidation and preparation of the defining 2007 Cinema Law (55/2007). The second one analyses the implementation of this law, the impact of the global financial crisis on the institution and the subsequent stabilisation, while the last period covered (2020–now) focuses on the transformation brought by a new media landscape marked, among others, by the rise of VOD platforms and the effects of the COVID-19 pandemic. Two other sections complete the analysis: the first providing a reflection on the transformation of the idea of competitiveness that the ICAA championed in those years; a last one that offers a look at future scenarios.

6.1.1. Searching for a model; 1997 – 2006

The period prior to the 2007 Cinema Law (55/2007), which is being discussed here as a defining moment in the transformation of the ICAA over the last decades, was marked by a process of **institutional stabilisation** that had one of its first highlights in 1997. That year, a Royal Decree Law (Real Decreto 7/1997) defined clearly the structure and functions of the institution and adapted it to the needs of an increasingly international media landscape. It reinforced its autonomous character after more than a decade of activity and distributed its functions among the four Subdirectorates-Generals that were already introduced in the previous chapter: besides the Secretariat-General, a) the promotion of film and audiovisual arts, b) international promotion and institutional relations, as well as c) preservation the cinematographic heritage, were the three other areas of intervention.

This important transformation for the ICAA followed a change in the national government in 1996, as the conservative Popular Party came to power, following generally a pro-market stance in cultural questions. At the same time, the change can be also read within the general line of development of the Spanish film policies and legal frame since the late 1980s, when a set of legal interventions had started to modify the prevailing *auteurist* model. The so called Decreto Semprún from 1989 (Royal Decree Law 1282/1989) and the Law 17/1994, both still passed under a social democratic government, had already signalled how the priorities were changing: the new law focused on “encouraging the development of independent businessmen and promoting private investment in film production, in order to reduce the State intervention and stimulate the financial structure of the sector”²⁶, as the law of 1989 explained in its preamble.

²⁶ <https://www.boe.es/buscar/doc.php?id=BOE-A-1989-25433>



For the national film industry but also for the audiovisual industries as a whole, **industrial competitiveness was now a priority**. The shift has been fostered by the new EC membership: Spain had entered the European Community in 1986 and the Royal Decree Law sought to encourage private investment with the conviction that it would trigger the production of films that were not only financially viable in the domestic market but also appealing to international audiences.

At the same time, the Decreto Semprún did not entirely reject previous ideas about film funding. The question of competitiveness was at the time gaining importance on the European level as part of the strategies deployed for the protection and promotion of the audiovisual industries. In addition to measures directed towards enhancing the competitiveness in line with the aims of the MEDIA program, the *Decreto* also kept **supporting the production of films of artistic merit** in the same way as the Eurimages Fund did.

Thus, while changing some of the priorities in the type of film policies that were carried out since the establishment of democracy in Spain, the Decreto Semprún became the model until the implementation of the 2007 Cinema Law. The funding policies that regulated the film industry remained quite constant, sharing similar ideas upon which the audiovisual policy was built, and the kind of films it should promote. At their basis stood the belief that

“Spanish cinema, now reframed within the wider conception of the **audiovisual industry**, could not live exclusively off of state funding and had to reach the necessary competitiveness and audience appeal to live on box-office takings. From that moment on, this idea guided the practices of subsequent policymakers” (Fernández Meneses, 2016, p. 76).

In the actual legal and policy implementation, important adjustments were made that reflected the importance of the ICAA in the adaptation of the main strategies for the promotion of the audiovisual industry. The Royal Decree Law 1039/1997 adapted the Decreto Semprún to the new realities, which were more industry oriented. However, to justify its enactment it kept referring to cultural arguments that were no longer supported by European policies. Fernández Meneses interprets this as the effect of the:

“pressures of the producers’ lobby, which demonstrated a clear reluctance to embrace the liberalisation that the EU was advocating, and that was contrary to their interests. Hence, they ensured that, since state funding had shifted to automatic subsidies tied to box-office success, they could find stable sources for funding in television companies” (Fernández Meneses, 2016, p. 97).



The growing presence of television in the film industry had also roots in the successive transpositions of the TV without frontiers directive that obliged broadcasters to financially contribute to the production of audiovisual works. The reshaping of the national market along this collaboration between television companies and film industry took some time. It still took some years to move the companies to cooperate with independent producers to comply with their legal obligation. The producers' claims were further supported through the Law 15/2001 and became of core importance for the legal framework developed by the Cinema Law 55/2007.

The ICAA was crucial in this process. It is surely no coincidence that José María Otero, who was its Director-General from 1993 to 1996, had been the Secretary-General of the Spanish film producers' association and lobby group Procine and its successor, FAPAE from 1993 to 1996.²⁷

While television was seen as a pillar in the industrial renovation of the Spanish film industry (the evolution over the next two decades proved how successful this model was, at least in industrial terms), ICAA followed since the late 1990s a parallel path (that is, centred on the specificity of the cinema model) to encourage the cultural value of the national productions. Central were, first, the independent producers:

“under the new policy endorsed by the EU from 2000 onwards, [they] were regarded as the only ones who could preserve cultural diversity against the multimedia conglomerates that owned television companies, which had become their main competitors.” (Fernández Meneses, 2016, p. 97).

The support of independent film production was central in the change of 2005 that culminated in the Law 55/2007. As a former head of the institution pointed out: “I thought it was necessary not only for the production, but also for distribution and exhibition. Support independent sectors, and that was one of the principles behind the 2007 cinema law.” (SINT1)

The second key aspect was the promotion of new talent. Through two Royal Decree Laws in 1997, the ICAA focused on the funding of short films (which were considered as a first step in a career in filmmaking), financial aids for new screenwriters and for those films directed by new directors. These measures were central in the renovation of the Spanish film industry in the second half of the 1990s (Martínez-Vasseur, 2019, p. 20).

²⁷ On Otero's own position towards public support see: Otero, J.-M. (2008). *¿Por qué se ayuda al cine? Protección, Arte y Humor*, EGEDA.



In terms of policy, the previous paragraphs have illustrated how evolution was never radical. Rather, it was the effect of a **gradual transformation that started already at the end of the 1980s**. The shift towards a model more interested in promoting competitiveness (where industrial interests were usually balanced against the principle of cultural diversity) has been interpreted here with an accent on the way European policies pushed this transformation. But also with a focus on its specific (national) implementation, specifically shaped by the role played by film producers, who positioned themselves at the core of an artistically ambitious industry.

By the end of the last century Spanish cinema attested a significant growth that reconnected it to its audiences (Sánchez Noriega, 2017): younger directors, with growing presence of women (33 women directed their first film between 1990 and 2001), were now open to play with film genres traditionally missing from the history of Spanish cinema (action, horror, thriller) and thus connect with their contemporaries in a process that some experts interpreted as a break of the traditional dichotomy between art and commercial cinema (Martínez-Vasseur, 2019, p. 30). The growing importance of television in the production and distribution of Spanish cinema over the next two decades was also cemented in the transposition of the TVWF directive and the regulation introduced in the late 1990s. Regarding the question of competitiveness, the measures introduced would be crucial to reshape the face of the Spanish Film Industry along an audiovisual model better suited to compete internationally with some exceptional successes.

6.1.2. Implementing a model; 2007 – 2019

It is hard to underestimate the importance of the Spanish Cinema Law of 2007. It has enjoyed broad political support since its inception and is still in force after almost two decades. A first, superficial approach to it would interpret its development as a consequence of the change of government in 2004 and the designation of Fernando Lara as Director-General of the ICAA in 2005.

Lara was indeed, as we will later see, crucial in this regard. But the law also drew its strengths from both the historical developments that it integrated and the European legal context that sustained some of its principles. In fact, as Susana de la Sierra, head of the ICAA from 2012 to 2014, has often pointed out (see especially 2019), the model set out by the 2007 Law “could be deemed a classic European one: it approached film activity from a supposedly cultural angle and consequently proposed a broad range of public aid.” (Díaz-González & González-del-Valle, 2021, p. 7).

In more specific terms, this commitment to support a cinema of cultural value was also linked to the European defence of cultural diversity. Since the early 2000s, the Council of Europe had



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followed the GATT Uruguay Round (1986–1994) in supporting the diversity of cultural productions and the non-binding Universal Declaration on Cultural Diversity issued by UNESCO in November 2001. Some specific examples were the Committee of Ministers' Declaration on Cultural Diversity²⁸ from December 2000 and the Council of Europe's Resolution of 12 February 2001 on national aid to the film and the audiovisual industries. The Convention on the Protection and Promotion of the Diversity of Cultural Expressions²⁹ is even mentioned in the prologue of the Spanish Law, which also refers to its Spanish ratification in February of 2007 (see in this regard Alborno and García-Leiva, 2018, for an evaluation of this context).

In their practical implementation, these general values were at the same time determined by more prosaic interests. The new Law 2007 helped endorse many demands traditionally raised by **Spanish producers associations** such as FAPAE, and especially by the independent among them:

“The role that television companies had to play regarding the film industry – whether as producers, co-producers or merely promoters and exhibitors of Spanish cinema – became the main conflict between FAPAE and UTECA [national association of private free-to-air broadcasters]” (Fernández Meneses, 2016, p. 104).

While private broadcasters argued that changes in the law were intended to make them responsible for the lack of success of national productions at the box office, producers and directors, usually backed by critics, defended a model that looked back at the 1980s for reference, usually waving the flag of “cultural exception” against “American imperialism” (Fernández Meneses, 2016, p. 106).

As already mentioned, **Fernando Lara**, ICAA's new director, was central for the development of the ambitious Cinema Law (55/2007). His background is key to understanding the focus of the institution in the following years. He had been a renowned film critic since the late 1960s, had also been the director of the Valladolid International Film Festival Seminci from 1984 to 2004, and always a firm believer in cinema's cultural value (see in this regard his co-edited volume *Cine y Educación*, 2019).

From the perspective of the ICAA, the new law first meant a considerable increase in the Institute's budget, which went from €53 million in 2002 to 124 in 2009. Furthermore, it explicitly acknowledged the integration of the film industry in a wider audiovisual context and obliged television channels to finance the projects of *independent* producers. The law conceived independent production as

²⁸ Cf. Council of Europe, The Declaration on Cultural Diversity (Adopted by the Committee of Ministers on 7 December 2000). Available at: <https://rm.coe.int/16804bfc0b>

²⁹ <https://unesdoc.unesco.org/ark:/48223/pf0000142919>



projects distinguished by their originality, quality, and artistic value. The law also advocated independent distributors (natural or legal person who, according to the law, “in carrying out the activity of film or audiovisual distribution, is not majority-owned by a company with non-EU capital, nor does it depend on it according to its executive bodies, its shareholding, its decision-making capacity or its business strategy”). In this sense, it made an effort to **define the concept of independent authorship related to cultural creation and diversity** (while also considering the commercial needs of film production) in forms that were crucial for the support of national and EU-cinema.

The 2007 Cinema Law was also key in securing the structure of the institution in the long term. Approximately 250 people work now (2024) at the ICAA; most of them (150) do it however exclusively for the Spanish National Film Archive (*Filmoteca*). Of the 250, 151 are state servants; 51 of the state servants work for Filmoteca.³⁰ Considering the different areas of activity covered by the ICAA, **these numbers are regarded as clearly insufficient** by the staff currently working in the institution, as well as by other relevant voices within the industry and policy institutions (SINT1, SINT2, SINT3, SINT5, etc.). “The ICAA works, but there are difficulties in its management because there is a lack of staff” mentioned one of the interviewees who had a direct experience with the internal personnel limitations of the institution (SINT2). “I believe that the ICAA, compared to countries of similar size to ours, has few human resources; that is, there are very few people who work a lot and have few resources at the level regarding its funding” (SINT5).

Beyond the specific figures, its administrative structure, which is dependent on state servants, that is, permanent staff recruited through public examinations, makes it also **difficult to appoint especially trained personnel in highly specialised areas**. This proves especially problematic for the restoration and conservation of film works at Filmoteca.³¹ Interviewees, among them a former head of the ICAA, also highlighted this aspect as a central concern regarding the management of the institution: “Filmoteca has a basic problem that is the traditional lack of personnel, because there is not specialised staff in Spain [among state servants] on restoration. For instance, people come from archives and libraries and adapt themselves to the new environment.” (SINT1)

³⁰ <https://transparencia.gob.es/transparencia/dam/jcr:7e0da2a9-0396-4a27-bce0-82f36a3512e0/230901-RPT-CUD-50248-PF.pdf> The state servant numbers refer to September of 2023.

³¹ Spain’s system of selection of public servants can clearly be improved. However, some of its virtues are that the selection is based on strict criteria of merit and ability; posts are also secured against changes in political leadership.



Refocusing now on the effects of the 2007 Law: while its forms of intervention were originally intended to affect different branches of the national film industry, its heritage, and film culture, **the practical implementation of the legal changes affected mainly film production.**

ICAA's aids for film production were divided mainly into two types.³²

- General aid (*ayuda general*) was designed to assist production companies in financing the production costs of feature film projects based on a set of 'objective criteria'³³.
- Selective aids (*ayuda selectiva*) were specifically granted to independent production companies for projects of particular cinematographic significance, cultural, or social value, documentary or experimental nature, or those involving new directors. These aids, in addition to the points system involved in the general aids, required a prior positive report from a collegiate body.

The definition of 'independent production company', which was crucial to ensure access to these aids, has been a topic of intense debate. The 2007 Law and the ministerial decrees that allocated the grants stipulated that independent companies were those which did not belong to a bigger media provider (TV channel, platform, etc.). In this regard, the Law aligned with the producers' lobbies "in their defence of the independent producer as bearer and ultimate guarantor of cultural diversity against the competition of both Hollywood films and the commercial productions of the private television companies" (Fernández Meneses, 2016, pp. 107–108). Private televisions, now forced to invest in national independent productions, were generally against it, as well as film exhibitors, who considered screen quotas for national and continental productions obsolete (SINT1).

The amplitude and the nature of the grants revealed its ambition. The budget to implement it was however variable and depended on the budget allocated to the ICAA, which was yearly set by the annual State Budget Law. As in other European countries, state support has been vital in maintaining a market share that in the case of Spain has traditionally moved between 15% and 20% and does not show a clear evolution in the period of analysis.³⁴

³² Beside these general and selective aids, the ICAA also allocated special grants for short film production. See in this regard the set of laws regulating the activity of the ICAA at: <https://www.cultura.gob.es/cultura/areas/cine/sobre-el-icaa/normativa-reguladora.html>

³³ These include the economic and financial viability of the project, its dissemination, the technical solvency of the beneficiary, the Spanish and European cultural relevance, its innovative nature as well as the socio-economic impact of the investment in Spain.

³⁴ According to the data provided for the Ministry Culture, the current share is around 20%. MCUD. Estadística de Cinematografía: Producción, Exhibición, Distribución y Fomento, 2023. Available at: <https://www.culturaydeporte.gob.es/dam/jcr:4060b6e9-4fa9-4f18-923f-f15066dcc03c/estadistica-de-cinematografia-produccion-exhibicion-distribucion-y-fomento.pdf>. Accessed in September 2023.



Despite a general concern about the challenges that the Spanish film faced in the fields of distribution and exhibition, the measures in these areas were not as effective as the ones related to production. **The implicit belief was that a change in the production** (an increase in the budgets for national productions, especially of independent films) **was not only necessary but also enough to enhance the presence and raise the profile of Spanish titles in international markets.** Besides, due to the Spanish government administration system, the regional governments (Comunidades Autónomas), and not the central government, were in charge of this area, which made the development of measures at the ICAA very difficult.

The law also enabled the support of the global promotion and dissemination of Spanish cinema through grants. Since then, the ICAA has committed to promoting Spanish films at international and national festivals (San Sebastián, Málaga), film markets, advertising campaigns, and catalogues. Among the latter, initiatives such as “Spanish Kaleidoscope. New Spanish Films” stand out. But **the weight of these promotion activities was still mainly on cultural circuits such as those provided by festivals or film weeks.** The commercial impact of national productions abroad was limited. Looking back at these developments, one of the main figures of those years stated how legal changes “could have encouraged those co-distribution agreements [But] that never came; the question was raised once and again, but it really never developed. I think something more could have been done in that area.” (SINT1) In this regard, it must be however noted that in the international promotion of Spanish films the ICAA collaborates with the ICEX, an agency at the Spanish Ministry of Industry, Tourism and Trade (Ministerio de Industria, Turismo y Comercio) which works worldwide with the goal of promoting the internationalisation of Spanish companies to improve their competitiveness and to add value to the Spanish economy as a whole (see García-Leiva, 2024, for a general evaluation of the Spanish audio-visual productions abroad in the years between 2016 and 2021).

The Subdirectorate-General for Promotion and International Relations was in theory the instance in charge of these areas since 1997. Its influence was however limited. In order to correct this situation and increase the promotion of Spanish cinema abroad, the most important step taken by the ICAA was to create the **Directorate of Marketing Policy** during the tenure of Ignasi Guardans, who followed Lara from 2009 to 2010. Guardans was a lawyer specialised in audiovisual media and a former member of the European Parliament. The new Directorate provided more significant support for international dissemination; furthermore, not being confined to the bureaucratic limitations of the other Subdirectorates (SINT3), it allowed the ICAA to act with greater autonomy and flexibility in opening up promotion strategies in an increasingly fast, varied, and transmedia market. The general



frame of reference for these challenges regarding the growing presence of Spanish films in a transmedia market had been provided by the 'European Charter for the Development and Adoption of Film Online', which was presented in Cannes in 2006. And yet, its effective implementation was missing for years.

Although the **internationalisation of Spanish films** (primarily through festivals) has been a main concern of the ICAA since its inception, it was mainly from the mid-2000s onwards that more decisive strategies were undertaken in this area. The ICAA was now, at the turn of the second decade of the new century, beginning to employ **a renovated approach to cinema promotion**, going beyond the traditional channels and focusing also on the support of festivals and educational programmes, that were still covered by other state institutions such as the already mentioned ICEX, but also the Cervantes Institute and AC/E Acción Cultural Española (SINT4 and SINT7), which usually embodied a more cultural take on these forms of promotion.

The law also foresaw (art. 37) the development of an office “similar to UNIFRANCE” (SINT1), a mixture of public and private funding, which would have taken care of the promotion, distribution and exhibition of Spanish cinema, and which would have been crucial to enhance its competitiveness. **This project never really took off, but reflects again the importance of the European frame of reference, and specifically of the French case, for the institution.**

Another aspect of this process of internationalisation was the **promotion of co-productions**. The ICAA, through its Subdirector-General for the Support of the Film and Audiovisual Industry, was responsible for managing co-production agreements that harmonise and stipulate the requirements and status of international co-productions. From 2011 to 2021, Spain made 528 films under co-production agreements, (ICAA, 2022a); 72 were co-produced in 2023, the largest number in the historical series³⁵.

Implementation and adjustments. The Law 55/2007 did not have the positive impact that its makers would have desired and, as the global financial crisis started to hit Spain in 2008, this led to fundamental changes in its development. The country was among Europe's most affected by the crisis; in late 2009, its unemployment rate was 20%.

Important adjustments were therefore introduced during the tenure of Ignasi Guardans (2009–2010) and Susana de la Sierra (2012–2014) at ICAA in a context deeply marked by serious financial strains

³⁵ <https://www.cultura.gob.es/dam/jcr:db9f89ab-d17c-4c0e-8c24-0d2c6520c677/4-3-largometrajes-coproducidos.pdf>



and a change of government (again to the conservative Partido Popular) in 2011. For the ICAA, this meant, in very specific terms, drafting the Orden CUL/2834/2009, through which the Royal Decree 1062/2008 would be regulated, and, subsequently, the Law 55/2007 would finally be fully applied.

Fernández Meneses (2016, pp. 113–118) and Triana-Toribio (2016, p. 90–95) have both studied the difficult development of the *Orden* and the strong reactions that it produced among producers. The next paragraphs sum up their arguments and readdress them from the perspective of the role played by the ICAA. In a time of important cutbacks in different areas of the Spanish economy, when (beyond punctual blockbusters) overproduction and low profitability of the Spanish titles was still the norm, these debates helped put again in the spotlight the different forces competing in the national film industry at the time and ICAA's role as conflict mediator.

Guardans promptly drafted the *Orden* and presented it to the film professional associations in June 2009 (Herdero and Reviriego, 2009, p. 58). **Echoing the same arguments used in 1989, he believed that it was necessary to focus resources on certain productions to reach a solid and stable industry and rationalise the spending of public funds in a time of financial crisis.** The *Orden* maintained the aids already set by the Law 55/2007 and also introduced new ones. Alongside promoting high-budget films which had proven to be the most commercially successful, the *Orden* also placed great emphasis on promoting auteur art-films through the advance subsidy, that is, films that could in fact contribute to enrich cultural diversity.

However, the *Orden* faced serious protests. The most contested innovations were those related to the aids for film production. The automatic subsidy part of the general aid began to be calculated over the number of spectators a film had during the first year of its commercialisation instead of its box-office takings. The *Orden* also acknowledged new habits in film consumption by considering legal Internet viewing, the sale and rental of videos and DVDs; and paid screenings at film festivals qualified to calculate the spectators.

Regarding the selective aids, they were only to be awarded to those films whose cost (not budget) was at least €600,000 and which had not been previously awarded the advance subsidy. The limits for both types of aids were “set at €800,000 per film regarding the former and €1,200,000 regarding the latter, providing that it did not surpass the film's cost or 75% of the producer's investment” (see Fernández Meneses, 2016, p. 116).³⁶ While the *Orden* aimed to reduce the number of productions

³⁶ Chapter III. Bases reguladoras de las ayudas. Sección 3ª. Ayudas a la producción.



without commercial prospects (20% of the annual production was never released in film theatres), subsidies were not tied exclusively to the film's costs.

Rapidly, a group composed of avant-garde and independent filmmakers (*Cineastas contra la Orden*)³⁷ formed to push for the withdrawal of the legislation and **accused the ICAA of drafting a piece or regulation that was too business oriented and benefited those producers focused on profits**. Cinephile journals such as *Cahiers du Cinéma. España* supported the protest: In their eyes, the regulation encouraged “big budget cinema and marginalises innovative, risk taking and rigorous [!] low budget films” (Heredero and Reviriego, 2009, p. 58). Triana-Toribio sees in this reaction by filmmakers and critics “a severe case of cinephile anxiety” (2016, p. 91), and it is difficult to disagree with that. **It is also hard to disagree with the idea that this form of criticism was recuperating for the national debate a set of values that had been gradually losing ground in the European film policies since the early 1990s.**

As Fernández Meneses indicated, these criticisms presented “a partial and very slanted view of the *Orden*'s draft. The ample and varied lines of advance subsidies, alongside the criteria to access both the automatic and complementary subsidies, were more complex than these criticisms imply” (2016, p. 116). They implied that only low budget productions were innovative, risky and rigorous. The journal also ignored that the wide range of advance subsidies were awarded according to the originality, cultural, artistic and experimental qualities of the project.

The *Cineastas contra la Orden* appealed to the European Commission in November 2009, accusing the regulation of jeopardising Spanish cultural diversity (García and Hermoso, 2009), but the *Orden* was finally approved by the Commission in January 2010. Some of the problems that it wanted to address could not be solved and deteriorated over the next years, especially in the context of budget reductions and general economic limitations. In order to clean up the ICAA's accounts, the new Director-General, Susana de la Sierra (January 2012 – July 2014), transformed in 2014 the subsidies from amortisation to advance payments. The 2007 Law had initially envisaged that aid would be granted ex-post for the amortisation of projects. This quickly led to important problems, as part of this money was not paid as intended; the ICAA mortgaged itself. In 2015 (Royal Decree Law, 988/2015), these aids were again changed, being from then on granted in advance.

³⁷ This was a group composed of avant-garde and independent auteurs created to push for the withdrawal of the *Orden* (see García, 2009).



During de la Sierra's tenure, there was also an attempt to open up new lines of support based on tax incentives to attract all kinds of projects (de la Sierra, 2019). This change reflected the financial limitations of the time (direct funding had been cut from 70 million in 2011 to 44 in 2012 and 33 in 2013), but also a general change of the government approach to questions of cultural policy. **This focus on tax incentives was still quite innovative in Europe**; the reference were in this regard UK and USA, where at the time this kind of support was more usual (SINT3) (see also de la Sierra, 2010, pp. 216-223).

The basis for the intervention through tax incentives was again the 2007 Cinema Law; its implementation was however further developed through a further Law 27/2014 on corporate taxes. Beyond the support of national productions, the law was also central in attracting international productions in Spain and the founding of regional *film commissions* over the next few years. While its impact on the transformation of the Spanish audiovisual industry was huge, this form of intervention in the market was not channelled directly through the ICAA.

On European level, the ICAA was at the time collaborating on the preparation of the Communication of the Commission on State aid for films and other audiovisual works.³⁸ The preparation of the document also contributed to the foundation of the EFAD in 2014, an organisation that “came up of something that until then was just an informal network.” (SINT3)

Among the further developments of the legal framework set by the Law 55/2007, there is one that stands out, as it reflects **ICAA's commitment to the implementation of what are usually seen as “European values”, while at the same time showing specific effects in the mid-term: gender equality.**

The 2007 Law had already focused on the promotion of women filmmakers. As a further example of the continuity that shaped the institution's policies, it was also one of the central lines of action of the ICAA under Susana de la Sierra and under Beatriz Navas; in 2018 the Orden CUD/769/2018³⁹ modified the criteria for all production aids, including those for short films and included points for those films directed, written or executive produced by women. Points were also awarded to those productions where at least 40% of the relevant categories were occupied by women. The effect of these policies can be seen in the phenomenal success of Spanish women

³⁸[https://eur-lex.europa.eu/legal-content/ES/TXT/PDF/?uri=CELEX:52013XC1115\(01\)&from=IT](https://eur-lex.europa.eu/legal-content/ES/TXT/PDF/?uri=CELEX:52013XC1115(01)&from=IT)

³⁹ Although Law 55/2007 already mentioned the goal of “establishing measures for the promotion of gender equality” (art. 19), these were still formulated in very vague terms. For the 2015 Orden CUD/769/2018 see: <https://www.boe.es/buscar/act.php?id=BOE-A-2018-10176>



filmmakers on European film festivals from 2022 onwards.⁴⁰ Although not directly related to the activities of the ICAA, its focus on gender policies had also an impact on the General Law on Audiovisual Communication 13/2022. Spain is the only European country in which audiovisual providers financing independent productions are required to allocate 30% of their budgets for works directed or directly created by women (Art. 119, 2.a.2) (SINT6)

There are two other important areas of intervention mentioned by the Law 55/2007 that couldn't be developed as originally intended. Regarding its relevance for the functioning of the ICAA and its approach to the national film industry's question of competitiveness, the report focuses now on these two subjects: The intended transformation of the ICAA into a State Agency (Agencia Estatal) and the interest on media literacy.

The conversion of the ICAA from an autonomous body of the Ministry of Culture to a State Agency (Agencia Estatal) was already foreseen in the Law 55/2007⁴¹, but its implementation was continuously postponed. The specific characteristics were sparsely described, as the project should have been further developed in other legal documents. The general reference was however the French *Centre National du Cinéma et de l'Image Animée* (CNC) (SINT1); in more specific terms the Agency found its examples in the UK and USA, where this kind of legal structure was more developed (SINT3).

The transformation of the ICAA into a State Agency would have granted the institution greater legal, administrative, and founding autonomy. It would have meant further financial independence for ICAA, whose budget has been traditionally decoupled from the yearly General State Budget. Instead, functioning as an Agency, the income would have been linked to a fixed fund derived from box office and other operating benefits (platforms, television and other content services). The change would have increased the agency's financial resources for its own activity and, more directly, the budget for public aids. **These arguments reflect the influence of ideas of New Public Management on policy-making that puts certain areas of policy specialisation at distance from government**

⁴⁰ In 2022, Spanish filmmaker Carla Simón was awarded the Golden Bear during the 72nd Berlinale for her film *Alcarràs* (2022). Her success prompted a broader discussion on women's position within the Spanish film industry but was also one episode of a longer story that went on over the next months: Sofia Otero, from Estibaliz Urresola's *20.000 especies de Abejas*, was awarded the Silver Bear for Best Actress in 2023. That year, at the 71st edition of the San Sebastian International Film Festival the Golden Shell went for the first time to a Spanish female filmmaker, Jaione Camborda for *O Corno*. This happened only some months after Elena Martín's *Creatura* had been awarded as the Best European Film at Cannes's *Quinzaine des cinéastes*.

A high representative of the Spanish Association of Women Filmmakers CIMA commented in this regard how difficult the implementation of these measures was, in order to assure the actual participation of women in decision posts such as producers. The actual effects in the industry could be felt around 2020 (SINT6), the prizes came just a couple of years later.

⁴¹ See especially its preamble and the first additional provision, which was dedicated to the project of the State Agency.



(see in this regard Pollitt and Talbot, 2004; Verhoest 2017). But there are also other arguments especially relevant for the Spanish case, as it was expected that the new administrative structure would have helped challenge some of the negative stereotypes usually associated with the institution. For example, characterizing it as a “factory of subsidies”:

“I think that in that sense it would be beneficial for Spanish cinema to govern itself because it would take responsibility for its own decisions rather than saying that it is the government of the day that has to pull *our* chestnuts out of the fire, wouldn't it be?”(SINT1)

As a State Agency, the ICAA could also enjoy **greater organisational autonomy**. The composition of its managing bodies would be open to representatives of different areas of politics, administration and industry, such as the Ministry of Economy and Digital Transition, the Ministry of Finance, the Ministry of Education or the Ministry of Industry, as well as members of the industry and representatives of the Autonomous Communities. As one of the former heads of the ICAA stated, this was not just a question of integrating interests and pulling sources, but also of “making them [different ministries and state offices] feel that they are part of it” (SINT3), that is, of **cinema as a question of national interest**.

At the same time, the hope shared by important figures of the ICAA over the years (SINT1 and SINT3) was also that the new agency would give the representatives of industry sectors a stronger voice and more independence from the political powers. The director of the Agency would have not been appointed by the managing bodies, which would have resulted in more stability for the institution (as already mentioned, in 38 years the ICAA had had sixteen Director-Generals; eleven of them were less than two years in charge).

The General-Director Beatriz Navas has also frequently highlighted that the transformation into an Agency would help the management of the Institute from a more technical point of view, allowing it to **hire people with more specific profiles**, different from the state servants that they have been usually forced to work with. Former high ranking officials at the ICAA (SINT1 and SINT3) had also previously lamented the institution's lack of autonomy to choose its personnel, especially when specialised profiles were needed. Agencies present a model of organisation imported mainly from countries such as the USA and the UK where the system is not based on civil servants, “pawns that are kind of ‘Jacks of all trades’, but a structure with more autonomy.” (SINT3) During Navas' tenure (2018–2023), other solutions were studied to stress the independence of the ICAA. As with its original intention of increasing the financial independence of the institution, the ICAA also faced the



opposition from the Ministry of Finance (Ministerio de Hacienda), which was not willing to give up its power on budgets or its control on personnel.

The **second important aspect** mentioned in the Law 55/2007 (art. 19), and which has haunted the activities of the ICAA since then, are the **issues related to media literacy**. In different forms of public statements, such as interviews and publications, as well as in the interviews conducted for this report, important representatives of the ICAA have constantly mentioned the importance of media literacy for the institution (SINT2, 3). At the same time, and besides some initiatives put into practice in recent years with the support of EU funding, the general impression is that there is a lack of coordination among the different initiatives that over the years have tried to achieve something in this regard. A specific plan seems to be missing, commented one of the former directors of the institution:

"It is necessary to define specifically [...] what the objectives that are pursued with it are. Depending on what is intended to be achieved, the instruments will probably be diverse. Perhaps the reasonable thing to do would be to draw up a document in which these objectives are clearly identified, differentiating by educational stages and pointing to the regulatory and other needs that each measure may entail." (de la Sierra, 2017, p. 21)

In 2018, Fernando Lara, who had been head of the ICAA from 2004 to 2009, prepared with Mercedes Ruiz and Marta Tarín a framework document that described possible ways for the implementation, by educational authorities, of media literacy plans at all educational levels prior to university. The model seemed to be in this case again France, specifically the ideas presented in Alain Bergala's *L'hypothèse cinéma* (original 2006).

Further intervention in this area came with the creation of two national film awards, one on cinema history (Historia de la Cinematografía), the other on media literacy (Alfabetización audiovisual) through an Orden ECD/360/2013. The first award was created to promote the study and knowledge of the History of Spanish Cinema, rewarding students that created a work that dealt with cinema in different facets. The purpose of the second award was to reward Spanish schools that promoted audiovisual literacy at various educational stages.

Apparently those prizes were only awarded once, which functions as a metaphor for the lack of long-standing measures.⁴² This is considered to this day an area where more could have been done. It

⁴² See in this regard Belinchón (2017), who reflected in a long piece for the national newspaper *El País* in 2017, about the difficulties faced by these measures.



promises a form of intervention that affects the whole film cultural realm and of course the competitiveness of national and European cinema. A main figure at the ICAA stated recently that the priority was now however in the organisation of already existing initiatives that would help enhance their effectiveness:

"We want to do it with two pillars, schools and cinemas. So it is true that surely we will have to negotiate with the autonomous communities, because if they do, we will join them, or they will collaborate with us. But our idea is [to collaborate with] exhibitors, cinemas and schools, and not so much presenting it as an extracurricular activity [...], but that audiovisual culture is presented as a part of the general activity. I have been also visiting film schools now, the powerful ones in Spain, the ECAM, the ESCAC [audiovisual schools in Madrid and Barcelona respectively], and they already do things too. They explained to me very nice projects that are not just about talking about cinema, but about maths classes, science or history classes linked to cinema." (SINT2)

6.1.3. Changing competitiveness of Spanish Cinema since the turn of the century

Before addressing the ICAA's most recent evolution over the last five years, the report makes a stop to focus on the transformation of the idea of competitiveness embedded in the activities and measures implemented by the ICAA. Considering the strong transformation of the ICAA described on the previous pages, how competitive was Spanish cinema in those years? As the first decade of the new century went by, an industrial model emerged dependent on the punctual success of certain works capable of approaching 20 million euros in box office revenue (or surpassing them, as in the case of *The Great Adventure of Mortadelo and Filemón* by J. Fesser in 2003, *The Orphanage* by J. A. Bayona in 2007 or *Ágora* by A. Amenábar in 2009) and with a decreasing presence of middle-class movies.

This national adaptation of a global phenomenon led to paradoxical results: in these years of important transformation marked by the global financial crisis, one finds the most successful films in the history of Spanish cinema. Of the ten top grossing Spanish films of all time, nine have been produced between 2001 and 2020, and five of them are within our period of analysis: *Ocho apellidos vascos* (No. 1, 2014), *Lo imposible* (No. 3, 2012), *Ocho apellidos catalanes* (No. 4, 2015), *Un monstruo viene a verme* (No. 7, 2016) *The Orphanage* (No. 8, 2007).⁴³ After 2007, this trend further

⁴³<https://www.taquillaespana.es/estadisticas/peliculas-espanolas-con-mayor-numero-de-espectadores-de-todos-los-tiempos/>



strengthened, when legislative changes of 2007 forced private television channels (*Antena 3 Cine* and especially *Telecinco Cinema*) to significantly increase their investment in film production.

These '**event films**' (one or two feature films that annually took a fifth of the total box office in cinemas, usually supported by television and with well-known faces both in their acting panel and among their directors) would therefore be the main engine to maintain the figures of the national cinema. It is a different type of cinema, with a different type of distribution based on an aggressive promotional campaign and with short exhibition times and that is interested in addressing a different type of audience, occasional and very dependent on this type of films.

Beyond these references, Spanish cinema, which increased its production in these years, suffered however to attract viewers. The Audiovisual Producers' Rights Management Entity put figures on this transformation in the most relevant study of these years. It noted a significant decrease, of two thirds (from 11.2% in 2001 to 4.2% in 2008) in the percentage of the population over 16 years of age who went to cinemas weekly (Ramos Arenas, 2020, pp. 99–101).⁴⁴

How was this transformation related to the evolution of the ICAA? As previously mentioned, the legal reorganization of the Institute in 1997 stressed the idea of improving “the competitiveness of the private sector and encouraging the application of new technologies” as one of the main goals. Considering the institution’s centrality in the national film landscape, this goal seems obvious to a current sensibility. But if we take into consideration the film historical context of the 1980s and the policies that have been supported by the institution in its first decade, the 1997 reorganization functions as a symptom of deeper changes:

The original system built mainly on auteurist premises, supportive of productions that equalled cultural value with commercial ambition had been coming under pressure since the late 1980s and it has been gradually substituted by a set of policies more interested in promoting commercial and market-driven film productions. The transformation built on the new guidelines of the European audiovisual market policy (*Television Without Frontiers* directive (TVWF, 1989) and the MEDIA 92 programme (1988) of the European Commission, as well as the *Eurimages* Fund (1989) of the Council of Europe) had also very practical effects: selective and advanced subsidies were reduced; support mechanisms based directly on box office results were increased. The ICAA even started at

⁴⁴ For a market overview see also the contemporary appreciation (2006) of Álvarez Monzoncillo in his report: *La situación de la industria cinematográfica española: políticas públicas ante los mercados digitales*. See also the yearly reports by the FAPAE (starting 2013): https://www.accioncultural.es/es/libros_digitales and the yearly reports *Panorama Audiovisual* by EGEDA (starting in 2001): https://www.egeda.es/EGEDA_PubLibros.aspx



the time a new line of subsidies for the support of distribution. At the beginning, their results were very limited in the practice but very important symbolically: they helped cement the idea, which would be crucial in the coming decades, that creating a successful film industry meant going beyond a successful film production. And that successful distribution was not just limited to success at festivals.

During the 1990s, ICAA's policies followed a similar path, thus defending an idea of competitiveness increasingly in line with commercial approaches. The agency tried to promote private investment (also of televisions), while film funding still based on cultural criteria (in the more traditional sense of 'quality', as in the 1980s) lost some of its weight.

As in the other examples, interviews and document analysis leave the impression that the concept (competitiveness) has no official, constant definition in the ICAA. Over the last 25 years, the transformation towards a more liberal, market-friendly model reflected on its changing idea of competitiveness. But the ICAA was also promoting a set of measures that culminated in the 2007 Law and had a somehow dialectical relationship to this transformation.

Thus, while the 2007 Law – let's remember, still in force with minimal changes after almost 20 years – has been usually framed as a reconstruction of a system interested in promoting “predominantly small, art-house, auteur and experimental films which failed to address mainstream tastes” (Jordan, 2011, pp. 19–23; see also Martínez-Vasseur, 2019), in reality it embodied a more complex approach to film funding and policing in general. It is therefore true that **in some respects, it recuperated the arguments that had dominated the Spanish and European film industry in the 1980s. But it also championed an approach that adapted them to contemporary market realities where the question of commercial competitiveness was capital.**

One of the interviewees made it clear how the redefinition of the institution, the development of the 2007 Law and its main policy lines were grounded on broader transformations. Somehow paradoxically, it could be seen both as a consequence of and a reaction to a national and European film industry that was, in the eyes of one former head of the ICAA, developing towards a model too dependent on large industrial conglomerates supported by television (SINT1).

Following his argument, it is as if, in order to protect one of the key values of the European cultural policies (diversity), the law was presenting an alternative to the general development of the European audiovisual space.



Equally relevant for the transformation of the idea of competitiveness supported by the ICAA was the reconsideration of other areas of intervention for its policies. While the support of film production remained at the centre of its intervention in the Spanish film landscape, the rise of other areas of concern **reflected a broader, more holistic approach to some of the problems faced by the industry**: these included film promotion, film literacy, international dissemination (distribution and exhibition) and a broader idea of “audiovisual culture”.

In 2018 the ICAA introduced a new line of aid specifically for cinemas to screen European and Latin American films; this kind of aid could not be previously implemented, as the regulation of the film exhibition sector was traditionally in the hands of regional governments. The aid was intended as a bonus for cinemas to support the implementation of film quotas that require the screening of a minimum percentage of European films (currently set at 20%).

The practical implementation of measures in all these areas was hindered by the effects of the global financial crisis of 2008. But the way these questions were constantly raised by aid programmes, intervention of public figures and debates reflected a broader change in the understanding of how the challenges faced by the EFI and its national markets should be addressed.⁴⁵

Summing up the development of the ICAA in the years that go from 2007 to 2019 and its effects on the questions on competitiveness, we state that its policies reflect a mixed model, **paradoxically European, of competitiveness**. First, as it was based on finding the right balance between the promotion of cultural diversity and industrial development. Second, because parallel to this more or less direct implementation of “European film policy principles”, the policies could be also seen as a reaction to a legal framework interested in promoting audiovisual industries in ways that felt menacing for independent and more artistically ambitious productions.

6.1.4. Transforming a model; 2020 – present

The next important wave of transformation came for the ICAA with the COVID-19. The pandemic was of course a disruptive phenomenon for Spanish and European film industry, but also served as an accelerator of some forces that have been changing the national film landscape in the previous years, especially the important growth of VOD platforms.

⁴⁵ See in this regard the results provided by the report D2.4 of this same project: *Lessons from the past. European Film Industry looks back at 30 years of changes, challenges, and paradoxes*. This report, based on interviews with 68 senior professionals from the EFI, also stressed the necessity to address many of the current challenges faced by the EFI (overproduction, digitalization, impact of streamers...) with more dialogue and mediation among the different parts of the industry.



Following the Law 40/2015, that regulated the work of the public administration, the ICAA prepared in 2022 a plan that set the main goals of its activities for a period of four years (2022–2025) (ICAA, 2022b, pp. 24–25). It specified four lines of action and expected budgets:

- Consolidation and strategic development of the institution (€5,881,012.47)
- Promotion of measures and incentives of cinema and audiovisual, to be executed by the Subdirectorates-Generals for Support, Promotion and Filmoteca Española (€471,433,250).
- Cultural promotion, to be executed by the Directorate of Marketing Policies and Filmoteca Española (€10,416,000).
- Protection and dissemination of the cinematographic and audiovisual heritage, to be executed by Filmoteca Española (€27,734,766).

Although the actual implementation has been complicated (Consolidation and strategic development started for instance with the preparation of a new Film Law, that should have been approved already in 2022 and is still being discussed), the plan is relevant as it shows the will of articulating film policies with a long-term perspective.

At the same time, the measures adopted to react against the worst consequences of the pandemic also served to reshape the national film industry. ICAA was crucial in this regard.

The measures affected originally different areas of the industry (production, distribution, international promotion, presence at film festivals, programmes of cinema-going, etc.). Significantly, from August 2020 to January 2021 the ICAA considered a premiere of a film in television or streaming services as “commercial premiere”, which facilitated support of feature films (Orden CUD/807/2020). Together with other institutions such the *Fundación Academia de Cine* and *Acción Cultural Española* (AC/E), as well as private enterprises (*Netflix*), the ICAA also started a programme for the support of professionals in film production in May 2020.

The main concern was however the support of exhibition spaces, cinemas being one of the branches of the industry most directly hit by the pandemic: In 2020 ICAA initiated a programme of grants for the promotion of the dissemination of cultural diversity by cinemas (*Ayudas para el fomento de la actividad divulgadora de la diversidad cultural desarrollada por las salas de exhibición cinematográfica*). They were originally conceived as a direct fund to help the cinemas more directly



hit by the pandemic (Ayudas para titulares de salas de exhibición cinematográfica), but they have evolved and redefined its purpose, focusing on the cultural diversity that film theatres embody.⁴⁶

Furthermore, part of the **EU Next Generation Funds** has been earmarked for the support of the film and audiovisual industry in Spain. A first line of aid was launched by the ICAA and financed entirely with EU-Next Generation funds as part of a *Recovery, Transformation and Resilience Plan*. The budget of the call, that covered firstly the years 2022 and 2023, amounted to €9 million. With these funds, the ICAA created subsidies for the support of audiovisual centres, subsidies for the distribution of Spanish films, and subsidies for the participation of Spanish films and audiovisual works in international festivals and other events. These aids sought also to accelerate digitisation, support international co-productions, facilitate the incorporation of more women and young people into the film sector with the purpose of closing the gender and generational gap.

There is an interesting shift in the way the aids were channelled: **laboratories and incubators** were now *in*, marking therefore a further step in the transformation towards **a model in which cinema creators were encouraged to deeply interact with other actors in the audiovisual landscape,**⁴⁷ **and where these forms of interaction showed spillover effects that went beyond mere film production.** Incubators included programs, forums, pitching platforms and residencies open to professionals and companies. Their participants passed a selection process that included “training, networking activities and mentoring to improve the competence and competitiveness of professionals and companies in the creative and development processes of audiovisual projects.”⁴⁸ Another shift in the idea of competitiveness was therefore included in the implementation of these new policies.

Regarding the **international promotion of Spanish cinema**, European funding also helped the development of new programs such as *Spanish Screenings* and *Ibermedia Next*, or the improvement of the already existing aids (Redacción AV451, 2024). Spain was named Country of Honour at the Marché du Film in Cannes in 2023 and was also ‘Focus Country’ in festivals such as Locarno Pro and in DocLisboa. In 2024, *Spanish Screenings On Tour* took place at the American Film Market in Las Vegas.

⁴⁶ <https://www.cultura.gob.es/servicios-al-ciudadano/catalogo/general/23/2314160/ficha/2314160-2023.html>

⁴⁷ The ICAA had however transferred the implementation of these measures to the regional governments (comunidades autónomas). Some, like Madrid, declined however to invest the funds in the intended way.

⁴⁸ See the official call for this aid programme: <https://boe.es/boe/dias/2022/01/04/pdfs/BOE-B-2022-502.pdf>



This focus on internationalisation has grown in relevance over the last years, especially under the tenure of Beatriz Navas (2018–2023). The ICAA also adapted its strategy to leverage the opportunities offered by the internet and streaming platforms. Among the projects that helped to digitally reboot the activities of the ICAA, one stands out: the development of Spanish cinema's own platform, the *Plataforma Fílmica Online Española* (platfo)⁴⁹ due in 2025 (Pantalla Digital, 2024). Since 2024, a project has been underway to create, in collaboration with Netflix, a video-on-demand service to promote Spanish cinema internationally.

Among the further measures that benefited from the EU funding,⁵⁰ one stands out for the ICAA. The plan “Spain. Audiovisual Hub of Europe” has been set to mobilise public resources estimated at €1.603 million over the period 2021–2025. It is expected to **finance different actions to support the Spanish audiovisual industry (clearly beyond the boundaries of film industry)**, through the four axes that make up this plan:

- Encouragement and digitisation of audiovisual activities, promotion and internationalisation and attraction of investment.
- Improvement of financial and tax instruments, further developing the mechanisms already foreseen in the art. 36.1 of the Law 27/2014.⁵¹
- Encouragement and promotion of talent and development of human capital.
- Regulatory reforms and elimination of administrative barriers⁵²

The plan aims at strengthening private investment and competitiveness of the industry through the promotion and training of talent, as well as digitisation. Its goal is to increase audiovisual production by 30% in 2025.

On a more critical note, the focus on production, the imprecise jargon regarding its objectives, and a certain lack of security regarding its future after the initial boost provided by the EU funds, makes the Spain Audiovisual Hub also a very interesting case study to illustrate the complex situation of the ICAA in a post pandemic context. It is worth mentioning that the ICAA is not directly involved in the Hub, which depends on the Ministry of Economy, Trade

⁴⁹ <https://pro.platfo.es/coming-soon>

⁵⁰ The financial resources come from the General State Budget and from European Union funds (mainly the European Fund for Recovery and Resilience, the European Regional Development Fund (ERDF) and the Creative Europe Programme for the period 2021-2027).

⁵¹ https://spainaudiovisualhub.mineco.gob.es/content/dam/seteleco-hub-audiovisual/resources/pdf/210222_Presentaci%C3%B3n%20Incentivos%20Fiscales_vf.pdf

⁵² Spain Hub Audiovisual of Europe. Guide. Plan to boost the audiovisual sector. See <https://www.investinspain.org/en/publications/spain-hub-audiovisual>



and Business, and not on the Ministry of Culture, as the ICAA does. And while the Hub follows different goals, it is also a telling example of a new approach to film policy and intervention in the film market that puts a limited form of economic competitiveness in its core.

6.1.5. Future scenarios

The activities of the ICAA should not in theory be affected directly by the new ‘plan’ (as the Hub is sometimes officially referred to). **At the same time, with the inception of the Hub there is clearly a shift in focus towards an understanding of the audiovisual industry that sees cinema only as one of many other areas of intervention such as video games, series, advertising films, animation, etc.** A vision for which concerns like cultural diversity, artistic excellence or cultural capital are secondary. The focus on tax incentives, regulatory reforms, etc. explores also a line of financial intervention that has been very limited for the ICAA – despite some intentions in this regard under the direction of de la Sierra.

A former head of the ICAA commented in this regard some of the possibilities and shortcomings of the new model in collaboration with the Hub:

"I think it is an interesting project, but with a strictly economic vision. So, again it is legitimate, but you cannot propose that as the only measure of protection for the audiovisual. Because you want to protect culture as well, right? And above all, from what I understand, there was some susceptibility because you didn't know exactly what it was going to be used for... What was really being done?" (SINT3)

A final episode illustrates like no other the history of the ICAA in this post-pandemic time and helps draw some future scenarios about its function:

As of 2024, a new “**Law of Cinema and Audiovisual Culture**”⁵³ has been already drafted. It was prepared under the leadership of the previous director of the ICAA, Beatriz Navas (2018–2023) but it has not been passed due to a further change in the government. It should update the Law 55/2007 as well as adapt it to the new audiovisual landscape. The new document is a sign of policy change: its very title makes clear its intention to extend the scope of regulatory action to the audiovisual sector as a whole, without prejudice to the fact that the cinema will continue to maintain a special

⁵³ See the current draft, in discussion since June 2024: https://www.congreso.es/public_oficiales/L15/CONG/BOCG/A/BOCG-15-A-26-1.PDF



level of attention and protection. It is in this regard foreseeable that this legal reconfiguration will also have an effect on the ICAA, as it reshapes the central state body for the audiovisual sector.

In line with the transformation of the previous years, aids and grants should help not only production (already in the stage of project development and covering audiovisual projects in a broader sense, not only films), but also **exhibition** (specifically with a focus on independent cinemas and the support of digitisation of film theatres), **internationalisation** (not only of films, but also of series and other audiovisual projects) and **film heritage** (affecting mainly the activities of the Spanish National Film Archive Filmoteca Española, especially the diffusion of its materials). The aid should also adapt European directives by being more open and flexible.

The new law keeps stressing the importance of independent producers, and in this regard channels the changes already present at the General Law of Audiovisual Communication from 2022 (itself a reaction to the Audiovisual Media Directive 2018/1808). Also related to this evolving legal landscape, it foresees a new control of audiences that take into consideration the consumption of cinematic and audiovisual works in different media services such as VOD platforms.

The ICAA was a driving force and a mediator behind the development of the most recent bill (SINT2), channelling interests of different industry actors, ministries, broadcasters etc. The result reinforces the role of the institution in the funding and promotion of national and European cinema.

But the draft of the new Law can be also seen as a further transformation towards a liberal model of policy in its growing commitment to tax incentives as a form of economic intervention, the integration of cinema within the audiovisual industry or its direct references to the plan “Spain Audiovisual Hub” (the suffix “of Europe” is now significantly missing in the new Law).

The new law also foresees the creation of the State Council of Cinematography and Audiovisual Culture, to promote greater public-private collaboration in this field; to participate in the formulation, application, evaluation and monitoring of public policies in the field of cinematography and audiovisual culture that are the competence of the State; to develop a plan for the promotion of literacy in film and audiovisual culture and for the creation of audiences; as well as to promote conciliation, mediation and arbitration mechanisms for the proposal of agreements and resolution of disputes that may exist between the agents involved in the field of cinematography and audiovisual.

Looking back at almost 30 years of activities at the ICAA, and stating how a set of recurring themes have been constantly shaping its evolution, there is no doubt as to the need to ensure this mediation among the different voices of an increasingly complex media landscape. One can however wonder



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if the addition of a further institution (besides the ICAA, the Hub, the regional film agencies⁵⁴) offers the best solution to deal with these challenges.

6.2. Poland

Similar to other cases, institutional support towards Poland's film industries has come a long way through different transformations, both from socio-political and technological points of view. On the one hand, **the foundations of the Polish Film Institute date back to the law of 2005, which opens more possibilities to assess PISF competitiveness from the task-related and organisational point of view.** On the other hand, the results of the semi-structured interviews conducted in Poland also made clear that **the democratic transformation in the aftermath of the 1989 elections is central to analysing and understanding the past, present and future competitiveness of Poland's film history and the role of the PISF in it.**

First, we look at the foundations of the Polish Film Institute from the perspective of an organisation tasked to foster Poland's film competitiveness at different levels, with the emphasis on socio-cultural, political and management dimensions. While the technological dimension shall also be addressed among the critical factors of Polish film industry development over 35 years (1989 onwards), the focus is on the interviewees' evaluation of regulatory and key performance indicators.

Based on the data and a holistic view of Poland's film industry's recent histories, three phases are key to understand the foundations and societal relevance of the PISF. The so-called diachronic approach presented here includes the key socio-political junctures with Poland's democratic transformation and maturation:

- Firstly, the so-called **edge of authoritarianism and democracy**, when filmmakers and film production processes and strategies from the pre-1989 era contributed to significant changes in future film support, regulations and the overall fabric of Poland's film competitiveness. As the interviews made clear, these resonated as specific path-dependencies in the funding organisations and organisational/industry mind-sets over the following 35 years; they are key to interpreting the current challenges as an unfinished transformation of the film industry reflecting ongoing political ties and politicisation of management, and the overall political culture.

⁵⁴ The Spain Film Commission Network lists currently (2024) 47 partners that work on local and regional (including the regiones and Comunidades Autónomas) level.



-
- Secondly, the era of **Free Poland and transformative 1990s foundations**. This period was characterised by significant changes in the media landscape (such as the introduction of private TV and the 1992 Broadcasting Law), systemic changes in connection with the new ways for exhibition and promotion juxtaposed with a boom of TV film industries and high societal interest. This phase also looks at the pre-PISF conditions through the lenses of Europeanisation of policies at the turn of Poland joining the EU, central in fostering a new ecosystem central for production and distribution.
 - Finally, the analysis of the institutionalisation of Poland's film industry takes into account **the era of the Polish Film Institute** as one of the most critical – and crucial – junctures for assessing and evaluating competitiveness in terms of internationalisation, Europeanisation and platformisation. In this phase, the emphasis is being put on the 2005 Cinematography Act alongside its practical implementation, with some broader socio-cultural challenges, including Poland joining the EU in 2004 and – more broadly – recent shifts brought by the impact of the global giant high-tech platforms on the production and distribution culture.

The data from the semi-structured interviews has been grouped under the so-called three diachronic phases to observe critical narratives in terms of organisational foundations, management and politics alongside the potentials and pitfalls that accompanied the evolution towards increasing the competitiveness of the national and European film industry. Findings from qualitative interviews have been extended by the 'grey literature' and available data on the Polish Film Institute, as well as scholarly and industry works.

6.2.1. On the edge of authoritarianism and democracy

Looking at the cultural foundations of today's PISF, Polish interviewees made several references to significant historical films and events, emphasising **overall democratisation** of film industry/production – in terms of management, support and funding.

On the surface, **the interviewees reflected on the so-called critical junctures**, such as the so-called August 1980 Agreements and the creation of Solidarity, which spurred the production of ambitious political films that became cultural landmarks in Polish cinema with the examples of Andrzej Wajda's *Man of Marble* (1977) and *Man of Iron* (1981). However, the introduction of martial law in 1981 disrupted the rise of Poland's film industry with the new wave of censorship, and governmental interference in the careers of filmmakers led to the suppression of creative cinematic



expression. Many productions, hindered by restricted distribution and lack of promotion, were deprived of the chance to reach audiences and achieve societal and international recognition (Uchaniuk, 2023).

In the late 1980s, Poland adopted the **progressive Law on Cinematography of 16 July 1987**, which introduced the Supreme Board of Cinematography and the Committee of Cinematograph. The challenge was then to understand not only how the free market works but also to introduce significant organisational changes in Polish movie management. The shift could be felt on different levels (industrial, artistic, cultural, ideological, etc.):

“The fact that film has ceased to be a politically desirable thing according to these doctrines of Lenin. The fact that film is the most important of the arts is what everyone repeated” (PINT10).

Introducing a free-market economy and democratic institutions after the partly free parliamentary elections in 1989 opened new opportunities for the national film industry; **the institutional support that the industry was to receive in new, democratic Poland, as well as its competitiveness were now central**. One interviewee called this period a milestone for cinematography, “similar to other industries entering the capitalist era at the turn of the 1980s and 1990s” (PINT4). From then on, **competitiveness and institutional support needs to be seen through the lenses of commercial priorities**, with a call for more systemic funding and better salaries for directors and creators in their new role on the job market (Sowiński, 2019).

As one interviewee pointed out, due to the control exercised over the creators and structures, there were indeed far fewer films made under the socialist-communist system, but when they were made, the budgets were huge and allowed for high-quality productions:

“[...] when money was poured into these productions, large works were made. Paradoxically, when you see the film *The Teutonic Knights* today, it is a big work. *With Fire and Sword* – it was a big work. **There were plenty of horses. Now, when one horse is written in the script, the producer starts to worry and says: God! No! Where will we get it from? How do we insure one horse?**” (PINT7)

Significantly, one of Poland’s most renowned directors, Andrzej Wajda, could only afford a used middle-class car after directing *Ashes and Diamonds* in 1958; a fact that reflected the modest compensation for his work (Kultura Dziennik, 2016). The overall findings on the so-called turn from



authoritarianism to democracy can be summarised as an ongoing blend of politics, finance, and societal contributions:

“Starting from the 1960s, especially when the Polish School was established, the film was political. On the one hand, because of the importance and money that was put in from the state and party apparatus. And on the other hand, **it also generated an oppositional socially driven culture with a new cultural identity**” (PINT10).

From a competitiveness and institutional point of view, directors aimed to create films that would attract a large audience, not necessarily the state authorities. At the same time, the financing system for the film industry reflected the state monopoly alongside politics involved in artistic creation, with **cinema turning from mainly state-owned industry to a predominantly private field**. Film institutions transformed, with most state institutions being dissolved while some were restructured (PINT4 and PINT8).

Building on the past and related societal and cultural path dependencies, there were some takeaways in the Free Poland era as funding and political interference continued to be challenging issues. One interviewee made it clear, speaking about the effects of the socio-political transformations – in other words –, the early stages of societal transition:

“The transition caused the film to free itself from political power, to free itself from censorship, but also somehow to lose because of it” (PINT10).

One of the challenges faced by Polish cinema in the 1990s was the need for an established organisational culture to finance film productions, while **looking at the solutions from the Western countries' perspectives**. However, Poland’s interviewees made also clear that at the time the focus was on **redefining the role of cinema in the new emerging socio-political system considering its new public service within a cultural economy that could generate significant financial benefits both for the society and the private sector** (Adamczak, 2019).

In more specific terms related to the film industry, in the early 1990s the ambition was to create cinema with an international appeal, with a further need to balance a non-free/public service market approach in culture alongside the societal-cultural contexts of privatisation. The overall transformation of the communist/socialist fabric of “the state-owned societies and institutions” (PINT3) was followed by the introduction of private ownership and competitiveness alongside the foundation of freedom of expression and the media (PINT1). Still, in some cases, there has been



some pre-1989 nostalgia, as another interviewee concluded that, at the edge of authoritarianism and democracy:

“[t]he financial outlays were certainly higher, also in the sense that no one was counting the money there (...) And if you look at the successes when it comes to the cinema audience, **the greatest successes of Polish cinema are from the pre-1989 era**” (PINT10).

6.2.2. Free Poland and the transformative 1990s

The socio-political regime changes after 1989 significantly influenced the transformation of the Polish film industry as Poland transitioned to a democratic system and consolidated a market-based economy, juxtaposing state and private ownership in media, culture, education, transportation, health systems, etc. (PINT1, PINT3 and others).

The challenge was at the time redefining competitiveness alongside practices to support funding, visibility, and **the overall reorientation of the film industry also in questions related to the role of archives and cultural heritage**. On the surface, at times – as one of the experts noted – it was difficult to sell Polish cinema abroad, as Poland’s cinematography “was not very competitive, because it was much more expensive, for example, than Czechoslovak film productions” (PINT2). Looking at the dynamics of that time, another interviewee noted:

“[t]here was a moment of interregnum when the financial and organisational decline was not yet so visible as to persuade both public authorities and the authorities of industry associations to introduce regulations. **Because regulations in the 1990s seemed not to be necessary. They were even something the least desirable, because it was a kind of infatuation with the freedom of the market and new possibilities, and directors who took advantage of this freedom**” (PINT10).

Decentralisation of film support institutions in the early 1990 had already shifted the responsibility for film creation and its financial outcomes to directors and producers. State political censorship transitioned to economic censorship imposed by producers, which proved to be more challenging and competitive in many ways. Many were disheartened by the initial influx of commercial audiovisual products that prioritized financial gain over artistic quality. Some filmmakers even went so far as to highlight the positive aspects of state censorship during the communist era (Haltorf, 1995, p. 16). The new market structure, comprising independent entities, granted film teams greater freedom but also required them to focus more on the commercial success of their projects. This cultural shift was driven by a desire to break away from the constraints of the previous regime



and the emergence of new filmmakers who explored themes like individualism, sexuality, and metaphysical humanism (Culture.pl, 2002).

From the institutional point of view, the first years of Poland's democracy were characterised by the redefinition of basic concepts, ideas and film market mechanisms. From the beginning, **the discussions focused on creating funding schemes in which the production would be based on state co-financing provided to the films themselves rather than to creators or individuals.**

The reform at the turn of the late 1980s and early 1990s involved transforming film groups into film studios and **changing the funding system to one based on objective criteria.** This meant shifting from financing institutions to funding individual film projects, which were presented as “packages”. The state continued to provide funding, but now on a competitive basis, also blending public service and private funds. From now on producers were required to submit their budgets and demonstrate that they had secured at least thirty percent of their funding from other sources. These sources could include individual sponsors, film companies, private enterprises, and foreign co-producers. In 1992, nearly half of the films were produced in collaboration with the Polish state television (Kornatowska, 1993, p. 47), transformed into public service media with the 1992 Broadcasting Act.

The abolition of censorship and the introduction of a new state system provided significant freedom to companies, particularly in the areas of co-production and distribution in the West. However, despite the limited government subsidies available through the Cinematography Commission at the Ministry of Culture and the Arts, **this newfound independence compelled companies to prioritise the commercial aspects of their productions** (Haltorf, 1997, p. 138).

Decisions on funding the film industries were made by independent expert committees of the Cinematography Committee rather than through official political channels. The reform focused also on developing producer-driven cinema rather than director-driven cinema, promoting a more professional, profitable, and market-oriented approach. This change aimed to replace unprofitable artistic projects aimed at small audiences (Adamczak, 2019). One interviewee pointed out in this regard:

“I'm not saying it's good, but **this situation forced the creators to have a different work model.** Note that you have to do it quickly, not many shooting days, because there is little money. Or do we have to make more money on it? So the shorter we shoot, the more money we will earn, we as producers, or us as the main beneficiaries of the budget” (PINT10).



In more specific terms, in 1991, the Film Production Agency (Agencja Produkcji Filmowej, AFP) contributed to the allocation of funding from the state budget and acted as co-producer in terms of private investments. **The overall scheme was based on the AFP using funds from the Ministry of Culture, which – in practical terms – meant that the film industry was prone to be influenced by the governing parties alongside their visions and cultural policies** (Majewska, 2017). The discussion on the shape of Poland's cinema in free Poland can be summarised as the clash (and an interplay) of the so-called liberal and state intervention approaches. For instance, the narrative under the centre right-wing government of Akcja Wyborcza Solidarność (1997–2001) addressed whether the film industry could function as a self-financing industry based on private ownership and investments, prioritising the value of a free market (Kruk, 2015). On the contrary, the following left-wing government by the Sojusz Lewicy Demokratycznej and Polskie Stronnictwo Ludowe (2001–2005) prompted the filmmaking community to advocate for a new cinematography law that would regulate public finance funding for national productions (Orankiewicz & Majer, 2018).

The political instability and reliance on state funding steered filmmakers away from politically engaged cinema, as aligning with a particular ruling party could jeopardise long-term career prospects due to frequently changing governments. Consequently, many filmmakers avoided political affiliations to ensure sustained career development (Majmurek, 2022).

This intricate period of transformation has ultimately laid the foundations for a more diverse and commercially conscious Polish film industry, fostering an environment where creativity could flourish with fewer political constraints. Poland joined the cultural support fund Eurimages (Council of Europe) in 1992, which is usually seen among the key steps in the Europeanisation of the Polish film industry. **The so-called 'transformative 1990s' were to redefine the value of Europeanness**, supported by Poland joining the Council of Europe in 1991, the European Union in 2004, and other related European and media professional movie and audiovisual networks, programmes and associations (for instance, the European Broadcasting Union in 1993, Europa Cinemas in 1992).

When asked about the multiplication and development of film institutions in this second period, the interviewees noted the critical importance of European support and related funding bodies, with one of the experts claiming that:

“The first serious money for some ‘civilised works’ in free Poland came from the European funds, not the national ones” (PINT1).



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Overall there were politicians, researchers and film-makers who participated at the time at various international events, which allowed them to observe both successful and unsuccessful practices in constructing national film system(s). At that time, there were **individuals acting as hubs, participating in the EU-driven and supported events and exchanging knowledge on the shape of the European regulations**, and/or drafting the foundations of the new democratic media law in 1992, the reinforcement of media freedom in the Polish constitution (1997) and regulations for the media and audiovisual industries (PINT1).

One of the respondents pointed out how international cooperation and exchange facilitated the search for inspiration in countries with a long democratic history that could act as systemic references, such as the **BBC for building Poland's public service media and the French model for the establishment of an audiovisual media authority as the National Broadcasting Council**. From today's perspective, the ways the work within the national film industry had been conceived over decades was radically changed:

“Polish filmmakers began to look for market solutions in various ways. This caused an absolute financial collapse on the one hand. And on the other hand, the organisational collapse related to the collapse of film teams, which were such a heart and brain of Polish cinematography for several decades” (PINT10).

Turning into the 21st century with new technologies and young generations of producers and makers has generated additional change in thinking about European values and competitiveness, with young people **calling for organisational changes and markets, and more active demonstrations of the European values in films**:

“[a]nd perhaps these are the assumptions of these national film institutes, which are to finance these productions. I have the impression that we, young filmmakers, are just looking for interesting and cool films. **We are growing up in such multicultural societies**” (PINT8).

6.2.3. Entering the 21st century

The third era of Poland's film development came with the turn of the 21st century, which had several implications. The changing socio-political contexts that came together with Poland joining the European Union have been followed by **global changes in the media and audiovisual landscape, with social media, high technologies, and platforms supporting further transformations of the movie (and audiovisual) industries**. Moreover, this period also reflects the multigenerational shift in the film-making, the growing presence of Polish productions at international festivals,



distribution platforms, alongside the rise of the multiplex and the blooming of the cinema infrastructure (Burandt, 2024).

On the national level, the most significant critical juncture was the introduction of the Law on Cinematography in 2005 and the Polish Film Institute, which shifted attention towards institutionalism, with the participation of European funds, including Digital Poland, Creative Europe, and MEDIA Programme (see, for instance Wróblewska, 2014; Miczka, 2010). One of the respondents explained that the so-called Film Act waited 15 years to be passed, as the overall discussion to launch the support institution started by the community a few years earlier (PINT10). The same expert noted that delays in law adaptation and the creation of PISF were due to decentralisation of support institutions and difference of interests between the Committee for Cinematography, the Ministry of Culture and private producers **“because the lack of regulation in a situation such as that, when some famous films were made, was an advantage”** (PINT10).

On the evaluation of the Cinematography Law from 2005, the experts referred positively to its system based on public funds, similar to the one that can be found in other European countries (PINT3); it juxtaposed public funds distributed by the new body with the growing importance of private investors, producers and individuals alongside regional funds (PINT7). The following quote illustrates the overall perception by the majority of experts claiming the introduction of the Polish Film Institute was a positive step in Poland’s cinema transformations:

“After 10 years of the Polish Film Institute’s activity, the Polish audience has returned to Polish film, which is a great success (...). And the greatest of this law [Law on Cinematography] is that it has created an efficient system that exists to this day” (PINT10).

However, from a broader point of view, **the same expert addressed the question of contributions to international cinematography and related competitiveness**, arguing that one of the central questions for next year’s 20th anniversary of the Polish Film Institute to be addressed would be:

“[w]hy does Polish cinema sell so poorly – well, maybe except for this festival circuit, which is something completely different? Why does the movie sell good everywhere else except Poland?” (PINT10).

As of 2024, the **Polish Film Institute has taken activities in five critical operational dimensions** (for more, see section 5.2 of this report), summarised in Table 7. In each dimension of PISF, there have been more detailed priorities for the further development of funding schemes. The emphasis during the interviews of this project was on the competitiveness of the Polish film industry, addressing



questions to assess the impact of PISF funds, **which primarily affect production, promotion, and support towards the broader film culture, with people, values and processes driving the organisational strategies (and the related organisational adaptation).**

Table 7. Main areas of action and priority tasks. Source: prepared by the authors on the basis of PISF data, <https://pisf.pl/dotacje/> [access: 10.10.2024].

Operational actions	Priority actions (in order)
Film production	- Priority I: Preparation of film projects - Priority II: Production of feature films - Priority III: Production of documentary films - Priority IV: Production of animated films - Priority V: Production of innovative films - Production and development of films for young audiences or family audiences - Production of minority co-productions - 2024 - Decisions after cancellation/upward/for later decision
Promotion of Polish film abroad	- Priority I: Promotion of Polish film abroad - Priority II: Distribution of Polish film abroad - Priority III: Scholarships abroad
Disseminating film culture	- Priority I: Film festivals - Priority II: Film initiatives - Priority III: Literature and magazines about film - Priority IV: Digital restoration - Priority V: Audiovisual market research - Priority VI: Technology solutions and initiatives
Film education	- Priority I: Universities and postgraduate schools - Priority II: Secondary and vocational schools - Priority III: Education and professional training - Priority IV: Professionalisation of language education - Priority V: Education in studio cinemas
Developing cinemas	- Priority I: Modernisation of cinemas - Priority II: Digitisation of cinemas

To contextualise the discussion on the PISF financial operations and the overall performance potentials, Poland accounts for about 3.4% of the total revenue generated by the audiovisual production sector in the European Union. In 2023, the balance of financial assets and liabilities of PISF amounted to PLN463,643,826.22 (€106,682,126.19) – according to the financial report to the Ministry of Culture and National Heritage (PISF, 2023a); section 5.2 of this report provides more information about the funding schemes and the budget of the PISF.



6.2.4. Ongoing and future scenarios for the PISF's idea of competitiveness

Beyond its centrality in the support of Polish film production over the last 20 years, the PISF has been also very active in fostering a set of initiatives that highlight the necessity of expanding the idea of competitiveness by making Polish film titles more accessible. For instance, from the very beginning of PISF's existence the Operational Program, titled "Promotion of Polish Film Abroad" has been focused on the internationalization of Polish productions through different means. On the one hand, the Institute primarily focuses on the presence of Polish cinema at the most important international festivals, such as Cannes, Berlin, Venice; it also advocates for the presence of Polish films in the most prestigious competitions, is responsible for the Oscar campaign, for the participation in the most important film markets, agreements and contacts with strategic foreign partners, as well as for equipping the Polish film industry with publications and directories, such as the globally acclaimed "Poland – Film Production Guide" and "New Polish Films". On the other hand, some limitations remain: in 2011, for instance, "the PISF's offer regarding the promotion of Polish films abroad was not fully utilized", says Michał Kwieciński, head of Akson Studio. For the promotion to be effective, much more money needs to be spent on it, and there was too little for production, so often these additional costs exceed the Institute's financial capabilities.

One of the most visible indicators for the PISF's competitive evaluation has been the Oscar campaigning. The producer whose film is the Polish candidate for the Oscar can count on the support and funding by the Polish Film Institute. The Institute is in contact with the American Academy of Motion Picture Arts and Sciences, conducts the entire procedure, primarily finances the campaign, and carries it out as the main responsible entity, always in close cooperation with the producers of the candidate film. The PISF's expenses for the Oscar campaign, or any of the prestigious film awards, can vary greatly (SFP, 2011). For example, the recent collaborative international production *The Girl with the Needle* directed by Magnus von Horn, nominated for the international Golden Globe awards in January 2024, received €63,234.94 under the PISF program (PISF, 2024g).

The sale of Polish films abroad has been traditionally the missing link in the structure of Polish cinema. Due to its statutes, the Institute cannot engage in commercial activities or in cooperation with any professional sales agents. Therefore, movies were sold either directly by the producers or by Telewizja Polska, which sometimes also retained the selling rights (SFP, 2011). Today, the situation looks better, as there are agencies in Poland that sell films abroad, such as New Europe Film Sales and IKH Pictures Promotion. There is greater awareness of the importance of the work of a sales agent and their role in the film value chain. However, this area, so central for enhancing the competitiveness of national productions, is still a niche to be filled. Polish films sell exceptionally



well in their domestic market. In 2022, domestic films accounted for 20.8% of the market share in Poland.⁵⁵

One of the other key aspects regarding competitiveness, has been to what extent funds provided by PISF contribute to Polish film industry diversity, as opposed to large commercial productions and market giants. Overall, interviewees noted the importance of public funds in contributing to Poland's cinema distinctiveness, calling PISF to support “more local, more intimate, more elite cinema” (PINT6) or the so-called “‘European cinema’ which is often regarded as more artistic” (PINT10) with “the artistic value calling for the public funds” (PINT4).

In this regard, references were made to Scandinavian and British movies, where there has been a shift towards artistic value and quality films as opposed to the so-called ‘mass cinemas and universalisation’:

“We have the *Crown of Kings*. And they have the *Game of Thrones*. However, during these 20 years, nothing has changed for the better when it comes to quality film vs what I call ‘IKEA glass production’” (PINT7).

Among the most recent examples of quality movies funded via PISF, the interviewees mentioned *Cold War* by Paweł Pawlikowski (2018), who won Best Director at the 71st edition of the Cannes International Film Festival and enjoyed broad international recognition (Zacharek, 2018). There are other examples among the high artistic and quality films recently submitted as Poland's Oscars nominees for the category Best International Feature Film. The 2024 animated production *Peasants*, by DK Welchman and Hugh Welchman, highlighted the creative potential of animation, also addressing the question of what should be the direction in selecting “the most universal candidate to have a chance of winning any award at all” (PINT11).

Another example of PISF's successful outcome would be *Sukienka* [“The Dress”], by Tadeusz Łysiak, a 2020 low-budget art film co-financed by PISF, which received a nomination for the Academy of Motion Picture Arts and Sciences Awards in the category of Best Short Film. While this movie did not win an Oscar, it was widely promoted at the International Film Festival in Moscow, the Rhode Island International Film Festival, the Brussels Independent Film Festival (PISF, 2020b, 2022b) or the Atlanta Film Festival (Vocal & Acting School, 2021).

⁵⁵ See the evaluation by the Crescine project in: <https://www.crescine.eu/small-film-industries/poland#:~:text=In%202022%2C%20domestic%20films%20accounted,the%20market%20share%20in%20Poland.>



Interviewees also highlighted **Poland's film cultural heritage with recent competitive successes of animation movies**. The Polish Film Institute supported animated films that have been successful at important award ceremonies, such as the Oscar. One notable example is *Peter and the Wolf* [Piotruś i Wilk], which won an Oscar in 2008, produced by the renowned Se-ma-for Studio and BreakThru Films, with co-financing from the Polish Film Institute (PISF, 2008). In 2012, eleven Polish short animations co-financed by the Polish Film Institute received nominations for the Academy Awards. All these related productions submitted by BreakThru Films were part of the "Flying Machine" project, which included a full-length film and a collection of short films produced in a Polish-Chinese co-production and overall cultural collaboration (PISF, 2012).

The mapping of successful film productions funded or co-funded by the Polish Film Institute reveals an essential focus on co-production with agencies from other countries, which, in turn, contributes to establishing international cooperation and distributing costs among the participating entities. Interviewees agreed that nowadays it is **much easier to pursue a co-production, considering both institutional and European support, parallel to the national institutes' European aspirations**:

“Some speak German, some English, but it usually works based on smaller or larger co-productions. **I think these European values are universal, like those of the European Union. And that's how co-production happens**” (PINT11).

Since December 2015, certain applications at the PISF can be submitted under the Polish-German Film Fund for project development and co-production between Polish and German companies. The fund comprises the Polish Film Institute, Medienboard Berlin-Brandenburg GmbH, Mitteldeutsche Medienförderung GmbH, and Filmförderungsanstalt (PISF, 2024f). One of the most recent examples of this successful model of collaboration has been the Polish-British-German film *The Zone of Interest* (2023) directed by Jonathan Glazer. The film has garnered acclaim from critics and audiences worldwide, as well as prizes like the Best International Feature Film and Best Sound award at the 2024 Oscars (PISF, 2024a). Other examples of successful international co-production involved *The Girl with the Needle* (the 2025 production in collaboration with the Film Institute of Denmark) and *The Delegation* (a Poland and Israel collaboration under the Polish-German funds) (PISF, 2022c).

Speaking about national and international movie festivals, one of Poland's interviewees noted that the Polish Film Institute emphasised different activities at different times, taking into account the priorities between production, distribution and exhibition, alongside other areas where



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competitiveness is central. As in the Spanish case, the transformation has been towards a broader interest in different areas of the film industry. One of the interviewees noted that during **the first years of the PISF, the goal was to normalise production, with the second phase focusing on support for cinemas. Today's focus is on cinema digitisation; there is at the same time a more general call for more involvement by the PISF in terms of distribution and promotion related activities** (PINT2). The evaluations echo some of the concerns expressed also by the Spanish and Finnish interviewees:

“Supposedly, there are some programs to promote Polish film abroad, and there is something else about this promotion, but somehow I don't often meet someone who uses it” (PINT8).

“Some films never even make it to distribution. Some films are bought by various television stations because there are many audiovisual content distributors. Still, they achieve minimal visibility and reception due to the low artistic or low quality of popular cinema” (PINT10).

Every year, the Polish Film Institute co-finances **the organisation of film festivals** as part of its Operational Programme for the Dissemination of Film Culture. **The website of the Polish Film Institute provides a regularly updated calendar of festivals that receive co-financing, reflecting the Institute's institutional and organisational support.** As of November 2024, 53 film festivals are listed as beneficiaries of this funding program (PISF, 2024c).

Notably, after many years, the Five Flavours festival has again received support in recent times. While there are no significant subsidy changes, several previously overlooked events have also secured funding. However, in the opinion of the interviewees, the amounts still need to 'be bigger for many festivals', as the previous funding policy favoured 'more significant events'. To this end, compared with the previous year, local movie festivals such as Solanin, Spektrum, Man in Danger, and Tofifest have experienced increased social attention and support from the local communities (Spór, 2024); this perspective contrasts with another evaluation of the PISF performance by one of the interviewees for this project:

“Recently, there has been a way of thinking at the Institute that only the most important festivals are important, and the less important ones are somehow unimportant at all” (PINT2).



6.2.5. (Present and) Future scenarios: Politics and management

Looking at the last 20 years of the Polish Film Institute, one of its recurring challenges has been to free its actions from ministerial and government influences and control. Despite the fact that the Polish Film Institute publishes the rules and regulations for applying for funding on its website, we have found examples of abuses by superiors or private individuals in relation to the financing decisions of Polish films and the decisions taken by the governments' agendas.

On top of funding schemes, including production, promotion and overseeing Poland's future movie landscape, the Polish Film Institute's policies towards competitiveness need to be evaluated **from an independent entity perspective**. One of the interviewees noted there is an overall challenge to balance PISF funds across a diversity of actors submitting their applications, as most beneficiaries are public institutions that have their budgets anyway; for instance, local communities and cities. This may cause **potentially relevant battles over movie funding policies and related politics**:

"And this is also a huge problem for me, and I hope that maybe something will change now in this new reality (...) We never got anything [from the Polish Film Institute]. Never anything. The truth is that I actually applied once because I knew before that there was no chance anyway, because we were not a member of the Arthouse Cinemas Network Association either, so for years, we couldn't just submit an application, so, in the end, I applied last year for air conditioning in the hall, but still, I didn't get it" (PINT4).

Looking at the wider socio-cultural spheres of the Polish film industry, the narratives that arose from the Polish semi-structured interviews have highlighted the existence of political connections and bias from 2015 onwards, and the necessity to address those critical questions. At the same time, interviewees also emphasised a crucial socio-cultural lens that blends with the 21st century media-political ecologies.

On the surface, the PISF performance has gathered criticism over the political distribution of public funds, this distribution should be read against the background of the political battles of the last two decades between the **governmental agendas of the conservative-right Law and Justice political coalitions and the more liberal movements and the Civic Platform coalition**.

The political change of 2015 was extremely controversial for the PISF, as it led to the funding of projects openly supporting the Catholic Church, and advocating for conservative views on families, women, LGBTQ+ and civil rights in Polish film and public service media, captured by political elites in early 2016. **Overall, the questions on the performance of PISF have been subjected to**



political battles, with recent scholars pointing out the challenges on what's at stake when looking at the current governance of the institution (as of November and December 2024), and latest controversies between the Ministry of Culture and National Heritage and the former PISF Director Karolina Rozwód (PAP, 2024).

Looking back, in 2018 the Polish Film Institute announced the projects selected for funding from the Education and Dissemination of Film Culture Operational Programme. **Many of these projects sparked controversy and amazement within the film community.** One notable funding allocation was for the TBA Group, which received a significant grant of €105,311 for their project *Celebration of the 40th Anniversary of the Election of John Paul II*, classified under priority 5 (Majmurek, 2018). This decision raised discussions due to TBA's political connections – as this was a company specialized mainly in film equipment rental, set services, and post-production. TBA has produced several other projects focused on papal themes, including *The Apartment* and *Testimony*, both aimed to present a personal portrait of John Paul II drawn from the memoirs and archives of his secretary, Cardinal Stanisław Dziwisz.

The years of the Law and Justice conservative right coalition governments were very present during the conversations, with the interviewees focusing on strong politicisation of the institution and its effects on funding and the applying process:

“I'm now applying to the Polish Film Institute for the first time after 6 years because, due to political reasons, I wouldn't have received funding before, so I didn't just apply” (PINT9).

“Film promotion – the Institute is created for this. However, he has not fulfilled his role properly for the last 8 years. So, normal management disappeared into the background and decisions were simply made discretionarily. The director's decisions meant that some were promoted and others were not. Those who had some artistic, intellectual, and intellectual independent thinking were not subsidised” (PINT9).

What's worth noting is that during the same period, various festivals centred on Christian values and the Foundation for Historical Education received funding of approximately €9,200 for the Historical Film Festival Valkyries Filmowe. For instance, the Arka Christian Film Festival doubled the funding it received from the PISF in 2018 compared to the previous year, amounting to €50,600.

To fully understand the Polish case, **one has to understand that the support provided by the Polish Film Institute is very dependent on who is in (political) power.** While conducting



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interviews, the researchers came across several references to the question of the PISF's independence and its potential impact on funding schemes, as these seem usually aligned with the government's agenda. While the Cinematography Act was passed thanks to the Law and Justice conservative right coalition government (in power in 2005–2007), the first two terms of office of the Institute Director were regarded as “logical and stable institutional development” (PINT10). Some experts named Agnieszka Odorowicz as an important figure. In 2005 she was appointed as the director of the Institute. In January 2008, she was elected a member of the board of the European Audiovisual Think Tank⁵⁶. In July 2010, she was re-elected as director of PISF and continued to serve the function after the creation of Civic Platform and the Polish Peasant Party centre-right coalition (in power for two terms in 2007–2015).

On the other hand, interviewees noted that the first decades of the Polish Film Institute were characterized by a budget and subsidies increase, which ended with the spectacular successes of *Ida* (2013), the first-ever Oscar Award for Poland in the category of foreign language film. On the other hand, the impact of this film encouraged conservative criticism against the movie, with socio-political media and their communities highlighting the anti-Polish messages in this film. His director Pawel Pawlikowski was accused, among other things, of “glorifying a Stalinist criminal.” This led to numerous inquiries directed at the Minister of Culture and National Heritage in 2015 (Sejm, 2015).

Table 8 shows the correlation of the Polish Film Institute with the related ruling coalitions over the last 20 years. While Agnieszka Odorowicz was relatively stable – and can be regarded beyond governments/politics –, the following Director-Generals appointed from 2015 onwards were highly connected with changes in the aftermath of parliamentary majorities and political elections. The critical junctures include the creation of the conservative-right Law and Justice government in 2015 and, more recently, the October 15, 2023 elections that resulted in the creation of a broad Civic Platform coalition, which involved left-wing parties and the Polish Peasant Party, resulting in changes in PISF management.

⁵⁶ Besides Odorowicz, the Think Tank, founded in 2007, consisted of Veronique Cayla from the French CNC in France, Fernando Lara from Spain's ICAA, John Woodward from the UK Film Council, Anders Geertsen from the Danish Film Institute, Danish producer Peter Aalbæk Jensen and Henning Camre.



Regardless of the government's power, the Polish Film Institute followed the state-owned institution's principles that the appointment and performance of the PISF Director "should be a political decision" (PINT9):

"As a result, we are very much immersed in politics, and it seems to me that right now, when the time comes to reform the Polish Film Institute, that's what it looks like. It is necessary to do **everything to ensure that the act includes such provisions that will really ensure the independence of public institutions**" (PINT9).

Table 8. Polish Film Institute: List of Director-Generals (2005–2024). Source: prepared by the authors.

Director-General	Terms of office	The Government
Agnieszka Odorowicz	03.10.2005 – 02.10.2015	The Law and Justice with its coalition parties
		The Civic Platform and the Polish Peasant Party coalition
Magdalena Sroka	03.10.2015 – 09.10.2017	The Law and Justice with its coalition parties
Izabela Kiszka-Hoflik	16.10.2017 – 07.12.2017 (Acting Director)	The Law and Justice with its coalition parties
Radosław Śmigulski	08.12.2017 – 11.04.2024	The Law and Justice with its coalition parties
Kamila Dorbach	11.04.2024 – 04.07.2024 (Acting Director)	Civic Platform with its coalition parties
Karolina Rozwód	04.07.2024 – 30.10.2024	Civic Platform with its coalition parties
Karolina Dorbach	31.10.2024 - currently	Civic Platform with its coalition parties

The interviews in Poland explained the relationship between the Polish Film Institute's direction and government changes in the following terms. Firstly, important changes in strategic directions were made after the creation of a majority Law and Justice government in 2015, which caused significant



modifications in the media sector, in the judiciary and the Constitutional Tribunal that pushed a conservative-right point agenda. These processes were criticised by the European Union for not meeting the rule of law principles, values and terms. **Similar to the 2015 media capture phenomenon, the film industry suffered what back then was considered a political takeover that reflected an increasing financial support for those films that strengthened conservative values, such as national identity, and an interpretation of Polish history alongside Christian values; they all matched the government's political agendas.**

Regardless of a dominant ideological government framework, interviewees criticised the political influence during that period, deeming it to be “deformed management” alongside the forms and extent of the Law and Justice PISF politicisation (PINT9):

“But when they [The Law and Justice Government] took power 10 years later, it was a different model of thinking about what culture was supposed to ‘serve’. It was supposed to serve the internal vision of the party, then the idea of identity cinema, historical cinema and super-productions. **Nothing came of it, because these are things that also require a different system, a different way of financing**” (PINT10).

On the surface, the new direction at the PISF resulted in staff changes, as one of them further argued: “People had to be fired because the only way to hire new people was that you fired someone” (PINT10), however with some limitations and finding temporary solutions. What eventually has blocked the total takeover of the PISF was the diversity in the kind of attachment of the employees to the institution:

“That is employment on the basis of contracts other than an employment contract, which is why institutions often cannot show how many people they employ, because they employ some people on permanent contracts and some people on temporary contracts of mandate” (PINT10).

Looking at the period of 2015–2023, interviewees noted significant changes in the role of the Director-General with some further evidence of **a growing centralisation in the process of decision-making**. One of the experts argued that systemic changes after the Law and Justice and related coalition parties created their first government, did not mean total PISF privatisation, but “a transition from central management to institutional management, to individual management” (PINT9). According to the Act, the PISF Director has full responsibility for public finances. Therefore, it is the director of the Polish Film Institute who decides; only “[i]n the second term, the way decisions



about film financing are made by expert committees and leadership committees was democratised” (PINT10). Looking at the other ways to evaluate the decision-making processes, another interviewee used a historical metaphor. In his opinion, the Polish Film Institute:

“**was designed to be a tsarist-style institution**, which of course is also due to the fact that it was prepared for a specific person, but it is very consistently managed in this style, and this is a problem. Because **here a lot depends on the whim of the director** [...] Unfortunately, this is a bad system, that is, it would be good if a person who understands cinematography sat there at least once. Unfortunately, there are usually people who do not understand this, which is a systemic error. It seems to me that a kind of division of responsibilities should simply be introduced, because it is a very large institution that has very large resources, the management of which requires clerical skills” (PINT2).

On top of the role of Director-General, his or her skills, some references were made to PISF as a public institution with **a high level of departmentalisation and in-house bureaucracy**:

“[a]nd in fact, there is no person there who could manage it from such a substantive side, who simply knows cinematography, not how to manage an institution, because you can be a good director of a screw factory and at the same time switch and become a director of a bolts factory. But in art it works a little differently” (PINT2).

This seems also to affect the way filmmakers approach the institution and its potential funding support, bearing in mind the broader – and more holistic – organisational and cultural lenses in which the Polish Film Institute has been tasked to operate:

“I like the fight against bureaucracy, but submitting applications to the Polish Film Institute, which I think is systematically slaughtering us and we are a petitioner towards it, not a partner, when in fact it exists only because we get up in the morning... So the day I stop getting up and making applications, this Institute will also cease to have its legitimacy, so I really don't like being a petitioner and fighting with bureaucracy with 1000 documents, sworn translations, filling out forms that have no legitimacy and also struggling with the fact that all applications have a side effect” (PINT7).



6.3. Finland

This section analyses the transformations in the operations of the Finnish Film Foundation, focusing on the changes in its international activities and domestic film policy over the last 25 years. During the period under review, the crucial phase for the Finnish film industry was the Finnish film boom at the end of the 1990s, which can be seen as a catalyst also for internationalisation.

It was difficult to identify as clearly a series of phases in the case of the Finnish Film Foundation as in the other cases studied in this report. The analysis is based to a large extent on the interviews and the Foundation's publications because not much research literature on the period under review exists. The focus is on the same areas and period, but the structure of this section is not entirely chronological. There is a return to specific historical phases in the context of the following six focus areas identified in the thematic analysis of the data: 1) Working with limited resources, 2) Observations on the competitiveness of European cinema, 3) The increasing competitiveness of Finnish cinema, 4) International promotion and its challenges, 5) The values guiding the work of the Foundation, 6) Future scenarios. **The historical development of the activity is examined in the context of each area.**

The data paint a picture of a Foundation struggling with limited resources but with no dramatic changes at the organisational level over the last 25 years. The issue of resources runs throughout the section. Still, it is discussed in particular at the beginning in connection with the steps taken in the international activities and the major changes that have affected the work of the Foundation.

6.3.1. Striving for international visibility with limited resources since 2000

Insufficient financial resources are the main problem affecting the work of the Foundation. The lack of resources was probably the most recurring theme in the interviews. In the early 2000s, the Foundation started to draw attention to the fact that its annual allowance was significantly smaller than the other Nordic countries' ones. (Mäkelä, 2017, p. 48). Although the state had increased its budget in the late 1990s, it was still significantly smaller than that of the other Nordic countries. The Foundation has continued to refer to this issue in its publications to this day.

Important steps in the Foundation's international orientation and striving for increased financial resources can be distinguished by examining the five target programmes it has published. The first target programme (TP) came out in 2000 and after that, the Foundation has published TPs for the years 2003–2005, 2006–2010, 2011–2015, and 2023–2026. The TPs outline the Foundation's



strategies for increasing international competitiveness. The first TP aimed to convince the decision-makers in the society of the development potential of the Finnish film industry (Kinnunen, 2019, p. 98). It explained the reasons why the year 1999 had been extremely successful for Finnish cinema among Finnish audiences. It also listed reasons why cinema is significant and needs support from the state: Finnish cinema reflects the identity of Finnish people; it can only be made in Finland; the audiovisual sector is growing internationally; and also as an employer. The TP goes on to argue that **the foundation for international success just like for domestic success lies in quality and that quality can only be achieved when filmmakers have sufficient time to develop their projects**. Longer working periods require more money, and therefore the budgets need to be raised (FFF, 2000, p. 6; FINT5). The TP proved significant, and the state increased its support for the film industry (Kinnunen, 2019, pp. 98–99). The target programme was still very national in its emphasis on the needs of the Finnish public, as Mervi Pantti (2000, p. 375) has pointed out.

The TP for the years 2003–2005 stated positively that “the demand for Finnish cinema for international festivals and other events already exceeded the capacity of the Finnish Film Foundation to deliver films for viewing” (2002, p. 12). It also mentioned that both arthouse films and big-budget productions were needed to secure international recognition for Finnish cinema (2002, p. 8). Despite the budget increase after the first TP, in 2005 the budget of the Finnish Film Foundation was still 65% smaller than that of the other Nordic film institutes, which was seen to affect both the quality and quantity, and especially the diversity, of films produced in Finland (FFF, 2006, p. 1, 9). A bigger allowance was needed also to move the distribution of Finnish cinema forward to the international market (TP 2006, p. 3).

The aim of the TP for the years 2006–2010 was to raise the funding to the same level as in other Nordic countries and to support filmmakers and producers to find and maintain international contacts (TP 2006, p. 1, 9). The TP contained a vision of Finnish cinema in 2010. According to the vision, consumers will find it increasingly difficult to see any difference between films made at home and abroad. Six of the twenty films produced each year will be international co-productions shot abroad. They will have international markets, over half of their budgets comes from abroad and almost half of this money remains abroad. Some of the Finnish professionals pursue serious careers abroad. To achieve all this, Finnish cinema needs more money and a greater variety of support instruments (TP 2006, p. 4–5).

The target programme for the years 2011–2015 emphasised the conditions of internationalisation. It noted that the share of international funding in domestic film production budgets had increased from



13% in 2010 to almost 20% over the last few years. Still, more funds were needed for the international promotion of Finnish films already in the development phase. According to the TP, internationalisation requires diverse genres, distinctive expressions, and modes of narration, and this may need risk-taking by the filmmakers. The TP reminded that the Finnish film industry is a tighter part of the EU's media sector and a part of the EU's MEDIA 2007–2013 programme, the mission of which was to increase the competitiveness of the European audiovisual sector and to secure audiovisual production in small countries and language areas (TP 2011, p. 7, pp. 18–20). An interviewee who worked at the Foundation on both sides of 2010 mentioned that the Foundation's funding increased around the same time thanks to then Minister of Culture Stefan Wallin (FINT9). The allowance grew over 50% during Wallin's time (Mäkelä, 2017, p. 60).

Despite many domestic (*The Unknown Soldier/Tuntematon sotilas*, A. Louhimies, 2017) and international successes (*Big Game*, J. Helander, 2014), the growth of the Foundation's funding slowed down again in the 2010s (Kinnunen, 2019, p. 136). Although the Foundation continued to make demands, the situation did not improve significantly over the years, as Mäkelä (2017, p. 48) has noted. The hope expressed in the TP 2006–2010 that the state would increase the funding to similar levels as other Nordic countries has not been fulfilled.

An interviewee pointed out that the Foundation's total budget has not increased because politicians and officials within the Ministry of Education and Culture do not perceive the value of cinema as an art form. According to the interviewee, they would rather allocate more financial resources to national theatre or opera even though cinema is a form of business that generates more revenue for the state. Cinema benefits from external sources which cover half of its financing. For this reason, negotiations with decision-makers and ministries were described as unpleasant (FINT1). The Foundation's current CEO Lasse Saarinen stated in 2024 that “the Finnish film industry is in danger of losing its growth potential”, because of the right-wing government's cuts to the film industry (Herrmann, 2024).

When asked about the less positive aspects of working at the Foundation, one interviewee noted the limited financial resources and stated that “sharing scarcity is not nice”. The interviewee continued:

“Since we are in a situation where our appropriations have not increased for 10 years, in practice it means that we have less money available year by year, but this has been resolved and then, in a way, perhaps the need for money has shifted to different things over the years. Here we are still moving forward, but next year [2024] we will clearly have such a situation



that some activities have to be stopped or reduced. It is not always possible to cut from everything, but it is fairer to everyone to state at some point that when there is less and less money available and to be distributed, then it is better to stop some activity” (FINT2).

According to current information, the Film Foundation’s budget will be cut by half a million in 2025. It should be noted that the right-wing government is also making major cuts in other cultural sectors: theatres, orchestras and museums will suffer from cuts of almost 11 million euros.

Based on the interviews, work at the Foundation seems to have continued without major upheavals or crises since the turn of the century. For example, no reference was made to changes in the leadership of the Foundation. The situation has thus calmed down considerably compared to previous decades when the Foundation was the subject of constant controversy and there were even calls for its abolition (see Pantti 2000, for example p. 363). As for the scarce resources, the staff seem used to coping with them. On a positive note, it was highlighted that Finnish filmmakers are privileged, as not all European countries have such a robust support system:

“We have incredibly good support systems in comparison to ... Well, I cannot even imagine what it is like to make movies in Latin America. But of course, within Europe there are huge differences. The reality of a Spanish filmmaker is completely different from ours let alone someone from Serbia” (FINT2).

The current film law that entered into force in 2019 was mentioned by several interviewees as the biggest organisational change during their time at the Foundation. The new law was described as having decreased the independence and decision-making power of the Foundation as a whole and that of individual experts. It gave the Ministry of Education and Culture more power over the Foundation's activities. One interviewee mentioned that they used to present support decisions directly to the board. However, now they only prepare the decisions, and the CEO presents them to the board, which then gives its approval. In other words, a new step has been added to the decision-making process, and advisors, for example, now need to consult more with their supervisors. Previously, they had more autonomy in dealing directly with their clients, the filmmakers. However, the changes brought about by the law were not felt to have had a significant impact on day-to-day work. (FINT3, FINT4 and FINT5).

The new 2019 law has resulted in a concrete change in the processing of support applications. According to one respondent, each applicant should now have equal opportunities for feedback, which means that there is less time available for each person. Additionally, the increasing number



of applications had resulted in the same interviewee feeling that the Foundation has become more impersonal (FINT4). Another respondent was also concerned that in the current situation, it is not always possible to give an equal amount of feedback to each applicant (FINT5). Film directors who responded to a survey in 2023 **seemed to share the feeling that the Foundation had become more bureaucratic. They complained that their role in the decision-making process was minor and that there was a lack of transparency regarding decisions** (Cañas-Bajo, 2023, p. 12).

Among the relations to other European film agencies, the Foundation's close and longstanding institutional relations with other Nordic film institutes and foundations stand out. According to an interviewee, cooperation between the Nordic film institutes and foundations started for real in the late 1990s, but there had already been collaboration in film promotion through the network The Five Nordics (until 2024 known as Scandinavian Films). Unofficial cooperation between production coordinators started in the early years of 2000 and has since been strengthened through production companies (FINT8). The closest colleagues of the experts working at the Foundation are often in other Nordic countries (FINT3), which underscores the importance of collaboration.

It was widely acknowledged that this type of official and unofficial collaboration between smaller countries is essential for ensuring competitiveness in the global market, which is dominated by larger countries such as France, Germany, Italy, Spain, and the UK. Nordic cooperation was mainly praised by the interviewees but there are some challenges due to differences in the organisation and operating cultures of their institutions. While all Nordic institutions rely on state support, some are more independent and capable of making quick decisions than others. Working with Sweden was described as slower compared to Denmark, for example, because film law is more complex in Sweden. Additionally, the production support philosophies of Finland and Sweden were described as very different. In the Foundation they have the responsibility to support all kinds of films, whereas in Sweden, commercial films receive no support at all. Another big difference is that the Swedish and Danish film institutes have the rights to the films unlike the Foundation (FINT1, FINT2 and FINT3).

One interviewee recalled that close cooperation between the Nordic countries has been viewed with some resentment by Eastern Europeans because, in comparison, the Nordic countries have greater financial resources (FINT6). The Foundation also keeps close contact with its counterparts in Baltic countries, especially with Estonia, and collaboration with them was described as natural, active, and smoother than with Sweden for example (FINT2, FINT7, and FINT9).



The dominant role of the Nordic countries also came up in the discussion on European Film Agency Directors (EFAD). According to an interviewee, and in line with the aspects already highlighted in the Spanish case study, the EFAD was a “discussion club” still around 2010 (FINT9). Cooperation among countries has intensified in recent years, enabling countries to learn from each other and identify optimal practices. The majority of the work is focused on influencing the EU, with EFAD serving as the primary instrument for this purpose. In practice, this often means that the Nordic countries, plus the Netherlands and Germany, set the standards for others to follow. As one interviewee commented with a laugh, “The Nordic countries plus Holland and Germany tell the others how things should be done” (FINT1).

6.3.2. Observations on the competitiveness of European cinema

The discussion on competitiveness and developments in this area produced a wide range of ideas and definitions. The responses suggest that the concept is not always clear, and it is used differently depending on the context. One interviewee admitted reluctance to use the term for this reason (FINT8). This easily leads to the impression that the concept has no officially negotiated definition within the Foundation, although it is widely used in its publications. The various definitions and conceptions of competitiveness given by the interviewees are discussed before moving on to the more specific question of the competitiveness of European cinema.

The interviewee who was reluctant to use the term said that competitiveness should mean that people are interested in watching a film. To attract audiences, a film must have interesting content and in terms of style, it must have some originality. The interviewee went on to explain that competitiveness is about finding a personal style. A filmmaker should be familiar with the tradition and be able to create something original and unique based on it. Pedro Almodovar and Aki Kaurismäki have succeeded in this (FINT8). Another interviewee approached competitiveness from a different angle, defining it as the whole chain from filmmakers to marketing and distribution, adding that competitiveness starts with good content. If good content is well marketed a film will eventually find its audience (FINT7). The importance of quality was stressed by several interviewees.

Here we already have several definitions of competitiveness. In addition to good content, competitiveness was seen to be about artistic originality on the one hand and a well-managed production chain on the other. Another way of approaching the issue was that competitiveness is about the importance of cinema compared to other forms of culture. So far, cinema has been able to reach bigger audiences than literature or even games, and compared to them, films generate



more revenue. The question is whether it will be able to maintain this position in the future (FINT9). Here, in other words, cinema's competitiveness was measured against other forms of culture.

These responses suggest that competitiveness is, among other things, about financial success and artistic quality, and that it depends on audience behaviour. Put simply, as one interviewee pointed out, European cinema will only be competitive in the future if it continues to be important to viewers and manages to reach large audiences (FINT9). Nowadays, the Foundation considers potential audiences and the release of films already at the development stage, which was not necessarily the case 10–15 years ago. The discussion about the early involvement of producers and financiers in the development phase made the interviewee think about how this would affect the traditional European *auteur* way of making films and storytelling (FINT9).

The interviewees agreed that there had been **no major changes in the competitiveness or attractiveness of European cinema over the past 25 years, although the quality of films was said to be better today**. One interviewee recalled that audience figures for European cinema have always been “grim reading” (FINT6). Another claimed not having seen a qualitative change in European cinema in this period: “Perhaps these various measures that have been taken to improve the conditions of European cinema on national or European level have just been able to keep the level of attractiveness or competitiveness the same” (FINT8).

The definition of good quality also remained ambiguous. Some respondents suggested that it had something to do with inventiveness and uniqueness and they mentioned Asian cinema as a counterforce to European cinema. Two interviewees felt that cinematic expression is being developed in Asia now (FINT5 and FINT9). Another argued that European cinema is tame in comparison to Asian cinema (FINT6). Such comments from experts give the impression that European cinema is currently lacking creativity and is in a state of stagnation. However, their views about Finnish cinema were more optimistic as will be explained in the next section.

Next, we will look at how the interviewees characterised European cinema. They acknowledged that films from different European countries share certain common elements, but that it is challenging to define them because independent cinema from other continents also exhibits similar characteristics. **Familiar concepts such as ‘auteur’, ‘author-driven’ and ‘arthouse’, and limited commercial success outside the home country, were used to describe European cinema, which was seen in contrast with the producer-oriented nature of US cinema.** However, the existence of popular European cinema, such as comedies and action films, was also recognised (FINT5).



There appeared to be a consensus that **“cultural diversity” represents the most significant strength of European cinema**, but that it also presents a challenge in terms of promoting European cinema outside of Europe (FINT1 and FINT4). At the same time, there was scepticism about Europe as a coherent idea. **The idea that Europeanness as a high concept would be somehow visible in everything was not considered beneficial, because “it produces such compromises that do not make art any better.** The strength of European cinema is definitely the fact that they are films of national interest, which at best are of interest abroad” (FINT1).

One interviewee suggested that because European cinema is based on cultural values and is guided by linguistic objectives, it is less universal and entertaining than mainstream US cinema (FINT9). It was mentioned that a film focusing on local phenomena can also spark interest abroad if its story contains universal elements (FINT4). However, to make a European film a proper phenomenon the content must be universal (FINT7). The success of a European film seems to require a delicate balance between unique local and universal elements.

Another interviewee who currently works at the Foundation mentioned that neither significant film phenomena, nor movements, or filmmakers, have emerged as frequently as earlier, and the large quantity of films produced does not replace the lack of phenomena. Currently, only a few films from this large quantity attract attention or are distributed outside their national borders. From a national perspective, the situation of European cinemas may be better (FINT7).

The majority of the nine interviewees stated that Europe produces too many, “a preposterous amount”, of films and that they rarely develop into phenomena that interest large audiences or audiences outside the production country (FINT7). This was described to be the case also with popular European films (FINT1). As one interviewee puts it: “The big paradox of European cinema is that a lot is produced, but you rarely see them” (FINT9).

Although it was not directly stated, the interviews gave the impression that European cinema is not as important to people today as it was decades ago. The significance of European cinema for European identity was recognised, although defining the precise nature of this connection was considered difficult (for example FINT4). European cinema was seen as having played a role in fostering shared experiences and a sense of European identity, particularly in the post-WWII era and during the 1960s and 1970s. It has played a role in helping people understand the diversity of Europe in a historical context when the international community was less connected than it is today. Italian neorealism and French New Wave were mentioned as important cinematic movements in this regard (FINT4, FINT5 and FINT7). However, today’s situation seemed to be different. One interviewee



believed that European identity is highly fragmented and that a unified European identity may not exist. This interviewee pointed out that even in the current century some European countries are still in conflict with each other and that “no common will has been properly found and perhaps never will. But I think that diversity and diversity of voices has remained, which is also a good thing and keeps us spirited” (FINT9).

On the one hand, interviewees mentioned the poor distribution and discoverability of European films. On the other hand, however, success at home was considered the most important thing. This raises the question of whether a similar thinking that emphasises the national perspective exists elsewhere in Europe among film experts, and to what extent it has an impact on the film policies of different European countries. In the case of the Foundation where work focuses on Finnish cinema and where funds for international promotion are very limited, such thinking is understandable. The interviewees admitted to the difficulty of thinking about European cinema, and its competitiveness, as an entity. Still, the Foundation's public policy has emphasised the importance of internationalisation since the early 2000s. Its strategy for the years 2024–2026 reads: “We support foreign distribution by investing in internationally convincing projects and authors” (FFF, 2024c, n.p.).

The Foundation's statistics show that European cinema does not have a very strong position in Finland. The interviewees also mentioned that Finnish audiences consume domestic and Hollywood films rather than European films (FINT9). One interviewee felt that Finnish audiences are not particularly interested in European cinema today and that the situation was more or less the same 25 years ago (FINT8). Another commented that today quite a few European films are still brought to Finland, but they are not necessarily distributed very widely within the country. The interviewee concluded: “perhaps it [European cinema] is, unfortunately, the object of interest of a shrinking audience” (FINT4). Another respondent told an interesting anecdote: according to the Foundation's statistics, Finnish audiences watched many more European films in the 1970s and 1980s than today. However, the interviewee argued that the statistics were partly misleading. According to the statistics, Italian films were the most popular European films in Finland at that time, but a closer look revealed that these films were spaghetti westerns starring Italian actors with American names, Terrence Hill and Bud Spencer, and dubbed in English. Technically, the films were Italian, but most viewers probably did not see them as Italian films. Another interviewee estimated that the Finnish public's interest in European cinema is perhaps one-fifth now of what it was in the seventies (FINT1).

One convincing explanation for the poor performance of European films at Finnish cinemas was that there are a lot of good European films on television in Finland (FINT9). The interviewee referred to



the Yle Teema/Fem channel which specialises in 'quality' films, most of which are European, and these films can be streamed for free on the channel's streaming service. It should be added that European films are being shown in cinemas for shorter periods, which also increases the use of streaming services.

Audience surveys conducted for the Foundation in 2008, 2010, 2013, 2015, and 2019 confirm that Finnish audiences prefer Hollywood films and Finnish films to European films. In 2008 and 2015 domestic films were the most popular, but in the other years, Hollywood films dominated. The difference between domestic and Hollywood films was 2–5%. In 2019, the difference in favour of Hollywood had increased to 37% against 17% for Finnish films. According to these surveys, the popularity of European films decreased from 18% (2008) to 12% (2019) (Parametra 2008; 2010; 2013; 2015; 2019).

The observation about the lack of interest in films from other European countries is confirmed by Huw D. Jones in his recent book *Transnational European Cinema: Representation, Audiences, Identity*, where Jones (2024, p. 220) states that Europeans watch few non-national European films, which “accounted for only 12% of cinema admissions in Europe between 2005 and 2015, with the majority of these films selling fewer than 5.000 tickets”. Around two-thirds of these films were English-language films, and many of them, co-produced action-adventures such as *Taken* (P. Morel, France, UK, US, 2008) and *Skyfall* (S. Mendes, UK, US, Turkey, China, 2012). Increasing financial support or the number of non-national films produced through EU programmes is not enough to improve the situation, as Jones says, but other measures such as film education initiatives are needed (Jones, 2024, p. 223).

As a possible remedy for the lack of interest in films coming from other EU-countries, the interviewees suggested reducing the volume of films and instead developing long-term productions that are distinguishable and a little bit more expensive (FINT8).

The interviewees found it difficult to evaluate if digitisation has improved the competitiveness of European films. The effects of streaming services were evaluated in different ways. One interviewee pointed out that there are a fair number of European films on streaming services but “we don't have information about what people watch on streaming services and if it has affected the visibility [of European films]. That, we don't know at the moment” (FINT9). Indeed, there are not yet enough statistics on what people watch on different streaming platforms, especially as regards smaller platforms. For one interviewee it had come as a slight disappointment that average viewers



have not started to look for more “obscure” content on streaming services and that perhaps such content remains the interest of film enthusiasts (FINT4).

The interviewees argued that the various video-on-demand (VOD) services increased the competitiveness of European cinema at least for a short period by improving distribution possibilities (FINT8 and FINT9). One interviewee noted that thanks to the AVMS Directive and digitisation, European cinema should have benefited from the boom of streaming services. The services had an obligation to invest in European cinema and international streamers had an interest in attracting audiences from different European countries. This required national content in the form of European films. However, the interest of the streamers soon shifted to original content, i.e. TV series, according to the interviewee. At first, there was a boom in European TV series, but now it has come to an end. Investment has decreased and this happened first in content from small European cultures (FINT8).

“It seems that when resources decrease or when there is less investment, the quotas set by the directive [AVMS] no longer work in a way that would guarantee new European content and investment. Instead, the supply becomes narrower. Investment in the major languages continues, and the number of productions will probably even decrease there. In the marketing of streamers, non-European, i.e. North American content now seems to be at the top of the list. [...] If financing develops in such a way that streamers are less and less likely to fully finance productions, but instead strive to partially finance and buy finished productions, this means that the focus on American offerings will be even greater in the future” (FINT8).

The effects of COVID-19 on the competitiveness of European cinema were explained in different ways, but it was agreed that the number of productions did not decrease much because the European film industry is strongly supported by public funds (FINT1). The pandemic reduced cinema attendance, which at the time of the interview had not returned to the pre-pandemic levels: “A certain cohort forgot that one can go to the cinema” (FINT9). After the COVID-19 pandemic, the war [in Europe] and the economic crisis have further affected cinema-going. Cinema tickets are expensive compared, for example, to the monthly payment of streaming services (FINT9).

In summary, the interviewees were not very optimistic about the current state of European cinema in terms of competitiveness. The decades following World War II were seen as the “golden years” of European cinema and European cinema was still often identified with the French New Wave or French cinema in general. Examples of recent interesting and important European films and authors were hardly mentioned. There was also a certain reluctance to evaluate the current



situation of European cinema probably because the focus of the Foundation is on the national and Nordic context.

6.3.3. The increasing competitiveness of Finnish cinema since the late 1990s

Based on the interviews, the current situation of European cinema in general and that of Finnish cinema seem somewhat contrasting – bearing in mind that they cannot be directly compared. There was agreement that Finnish cinema is more competitive internationally now than 25 years ago. It was pointed out that Finnish cinema used to lag behind other Nordic cinemas regarding international recognition, but this is no longer the case (FINT1). One respondent described current Finnish cinema as healthy and vital (FINT6).

An interviewee working currently in the Foundation commented on the Finnish audience's relationship to Finnish and European cinema:

“The Finnish audience's relationship with Finnish cinema is constantly on the rise and has been for decades. But then again, its relationship with European cinema... If we talk about those people who do not seek out culture, I'd say that the relationship has become distant. If we count from the 1970s to today” (FINT7).

The Foundation's annual Facts & Figures publications show that each year more and more Finnish films have been screened at international festivals. The TP for the years 2003–2005 states that “the demand for Finnish cinema for international festivals and other events already exceeds the possibilities of the Finnish Film Foundation to deliver films for viewing” (FFF, 2002, p. 12). By the year 2010, the internationally most famous Finnish filmmaker was still Aki Kaurismäki, but during the next decade, other Finnish filmmakers' films started to be chosen for international film festivals (Kinnunen, 2019, p. 112–113). In 2023 altogether 722 Finnish films were shown at international festivals, and 292 were feature films (FFF, 2024a). This is a clear indication of increased competitiveness. One interviewee with a long history at the Foundation described the transformation:

“It was like a completely different world 30 years ago. Kaurismäki brothers were the first ones to break through internationally. (...) People have understood what possibilities there are internationally. It seems to me that 30 years ago film was a sort of, rather national art form and (...) there were only a few individual makers who had ended up on international arenas with their films. **What has changed is the international interaction between producers, filmmakers, all film professionals, and especially education, (...) on the whole people**



are better prepared and better educated. (...) This is also a big mental change. (...) But there are an awful lot of explanatory factors for the fact that people have realised that they must move in international circles to get financing for their films and possibilities to do their next thing” (FINT2).

The same interviewee explained that in the last ten years, more and more Finnish films have been made as international co-productions because there is not enough national money. Such financial support has increased cooperation, and when small resources are combined, bigger productions become possible (FINT2).

According to the statistics, the Finnish film industry is more competitive internationally, at least in quantitative terms. A different perspective is offered by the directors, writers and actors who responded to a survey in which they were asked about the level and relevance of Finnish cinema internationally. They felt that Finland was not on a par with other countries. The main reason they gave for this was the low budgets of films. Other reasons included a lack of courage and vision on the part of financiers. Nevertheless, **they felt that there had been a positive development in recent years and that both the quality of films and their promotion was on the rise** (Cañas-Bajo, 2023, p. 9). The three main explanations for the good situation of Finnish cinema according to the interviewees were:

- 1) the **increased expertise and professionalism** of filmmakers, especially producers, thanks to both the EU’s support and local financial incentives;
- 2) a **change of mindset**: filmmakers understand the significance of international activities and collaborations today;
- 3) the number of filmmakers whose films have received international recognition has grown and **the international success of Finnish cinema is no longer on the shoulders of a couple of filmmakers**. There is more variety and voices today. (FINT2, FINT3 and FINT7). In addition, the rise of female filmmakers, at least partly linked to the Me-Too movement, was seen as a positive development for the Finnish film industry (FINT1).

It has been noted that **the seeds of this success were sown around the turn of the century** when the Foundation was able to increase the resources available to filmmakers. The Foundation’s budget was raised to the same level as before the national depression of the early 1990s (Kinnunen, 2019). It also encouraged filmmakers and producers to become more international and to participate in the MEDIA programme’s training courses (FINT6 and FINT8). This was the time when the above-



mentioned boom of Finnish cinema began. **As the interviewees noted, gradually new directors, screenwriters, and a generation of professional producers entered the film industry and started making audience-friendly, or commercial, genre films that appealed to audiences. The number of cinema attendances, more than seven million, was higher than during more than ten previous years. Four of the ten most popular films were Finnish, which was an exceptional situation.** Finnish films garnered 1.8 million viewers (five years earlier the amount had been less than 200,000), and the market share of domestic films was 25 percent, the highest in Europe (Kinnunen, 2019, 89–97).

A change of policy at the Foundation also explains this success. According to an interviewee who began working at the Foundation in the 1990s, the support decision system was chaotic and needed to be renewed. The interviewee described his task metaphorically as follows: “I was the ship’s coxswain, who also had some of the captain’s duties” (FINT8). In 2000 new guidelines for production support were published. The same year distribution and screening functions were integrated into the production function. The Foundation considered it important that the entire value chain from production to distribution would be considered in the film projects that it funded (Mäkelä 2017, 46-47).

According to Mäkelä (2017, p. 45–47), “a more business-oriented way of thinking was strengthening within the Foundation”. An indication of this was the Foundation’s goal to see 10 to 12 feature-length fiction films produced each year. The new guidelines for production support also indicated more clearly than before what kind of films the Foundation wanted to support (See also Kääpä 2016). In other words, the Foundation started to increase the support of commercial films that appealed to audiences better than artistic films. In the 1970s and 1980, the Foundation had based its funding decisions on aesthetic criteria, which meant that it funded mainly art house films, and it had been criticised for this. **In the late 1990s, a decision was made that more diverse films should be funded** (Kinnunen, 2019, p. 44 and pp. 89–97). It could be argued that since then, the range of films on offer has diversified and films that do not fit into a clear genre have also become successful.

Mäkelä (2017, p. 72) gives another reason for the growing success of Finnish cinema. As admissions for domestic films got higher, more private funding flowed in and this made more international co-productions possible. Television companies’ increased involvement also had an effect:

“[it] strengthened the business oriented thinking in film productions and diversified the financial basis for Finnish film. The more private funding was available, the stronger the



business oriented thinking naturally was in the industry. Then again, business oriented thinking in the film industry aims to capture large audiences, which then required a variety of films to be produced for different audiences. This eventually led to the production of a [sic] more diverse genre films, and today there are Finnish films ranging from animations to youth-, comedy-, and horror films.”

The Foundation recognised the importance of other funding sources and in 2011 launched the production support “50/50”, in which half of the funding must be acquired from independent sources (see footnote 26).

Mäkelä uses the concept of smart power to describe the Foundation’s key role as a supporter of the industry and as a mediator between its various components and players. However, he also (2017, p. 81) adds that the increased success and admissions for Finnish cinema was not the achievement of the Foundation alone. His research does not cover the role of the significant other “ecosystem players”, but suggests that television companies and production companies played an important role. Kääpä (2016, p. 205–206) also notes the role of independent production companies and private funding, which meant that filmmakers were no longer so dependent on the Foundation’s support – and the requirements of its “funding committees”. Still, the huge role of the Foundation cannot be underestimated. **Of particular interest as regards comparative analysis of the three national film institutions analysed in this report, is Mäkelä’s (2017, p. 64) claim the Finnish film ecosystem is unique because it is so dependent on the Foundation that “can guide the industry towards a direction they see as favourable”.**

As was noted, the interviewees were not very comfortable with the concept of competitiveness, and they gave it various definitions. **However, there seemed to be consensus that films are competitive when they find an audience. This may seem like an obvious answer. However, as it has been explained, it seems that competitiveness began to be understood in this sense in the Foundation only at the turn of the century.** In the 1970s the Foundation had favoured artistic films in its funding decisions. In the 1980s, some popular films began to be supported, but the quality of films was low, and the films did not find an audience (Kinnunen 2019; Kääpä 2016, p. 203–204). A real change of approach came with the more business-oriented, producer-led approach described above.

This change can be said to reflect wider trends in the then EU support as well, such as the aims of the EU MEDIA PLUS (2001–2006) programme. In the book *Finnish Cinema as a Transnational*



Enterprise, Henry Bacon (2016, p. 196) notes how the entertainment value of cinema instead of cinema as high culture began to be emphasised. Bacon cites European Commissioner Viviane Reding's statement regarding the MEDIA PLUS programme, according to which European cinema should not rely any longer on "inventiveness and originality", but should concentrate on winning European and international audiences.

To sum, the interviewees agreed that the competitiveness of Finnish cinema has improved over the last 25 years, and this has also been noted and explained in previous research. The Foundation's contribution to this positive change has been important, but the success cannot be attributed to public support alone, because the Foundation's grant budget has not continued to increase in relation to the expenses of filmmaking. Securing good working conditions was mentioned as the basis for good competitiveness. Filmmakers need peace, time, and better budgets (FINT3 and FINT5). One interviewee pointed out that documentary filmmaking processes may be very long, and currently the financial support for documentarists does not necessarily cover all costs (FINT5). Actors echoed these concerns and drew attention to the connection between limited resources, lack of time and the quality of scripts (Cañas-Bajo, 2023, p. 9). Such comments suggest that if the resources of filmmakers were further improved, the situation could be even better. In fact, despite the growing international visibility of Finnish cinema, financially the Foundation is still lagging far behind the other Nordic foundations and institutes.

6.3.4. International promotion and its challenges in practice

The main objective of the Finnish Film Foundation is to support Finnish cinema in Finland. This is stated as the Foundation's mission (FFF, 2024) and was emphasised by the interviewees. As a result, international promotion has always been a much smaller part of the Foundation's activities, "a sideline", as one interviewee commented (FINT6).

Considering the activities in the international scene, the Foundation is today very active, but this "international period" has been relatively short. **It was not until the late 1990s that the Foundation started to pay more attention to the marketing and distribution of films abroad.** At that time, the Foundation set up its first post focusing on international affairs (FINT6).

Finland joined the European Union in 1995, and the EU brought more opportunities for international funding and training for Finnish production companies. **The EU's Media programme (and subsequently Creative Europe Media), which Finland joined in 1993, has benefited the Finnish film industry greatly according to all the interviewees.** Finnish films have succeeded well in



REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.



obtaining support from the EU (FINT2). One interviewee argued that Finnish cinema might not even exist today if it had not received support from the EU (FINT6). According to one interviewee, in the 1990s, the development and distribution support provided by the MEDIA programme helped filmmakers expand their thinking beyond national borders, enabling them to create films with greater appeal to international audiences. In the long run, the most significant impact of the MEDIA programme has been its facilitation of international collaboration, which Finnish producers were still unfamiliar with in the 1990s (FINT8).

An interviewee who began to work in international promotion at the turn of the millennium described the role as isolating and challenging due to the lack of precedent and the absence of colleagues at the Foundation at the time. According to the same interviewee, **there was a lack of debate about what promotion meant and what the promotion criteria were, which also made the work hard.** The missing coordination between the production department and the international department, which was called the department for cultural export at the time, was also problematic. The interviewee argued that work was divided between these two departments in an unbalanced way. The cultural export department was mainly responsible for sending films to festivals, whereas the production department took part in EU-level discussions on production support, for example. The criticism brings forth the feeling that the international department was not as significant as it should have been. The interviewee believed that the situation is largely the same today, that is, the operations of the departments within the Foundation are still too disparate (FINT6). This was also the impression that emerged from the interviews. The remit of the international department seemed somewhat limited because they work only with finished films.

Around 2005 the Foundation started to invest more in **internationalisation** and the period 2006–2010 can be considered (as in the other case studies under analysis) Finnish cinema's transition period towards internationalisation (Mäkelä, 2017). At that time, the post of Head of Internationalisation and Development was created. The job involved establishing contacts with other film institutions and bodies that organise international co-production forums in Europe, and disseminating information on co-production projects to Finnish producers. Producers started applying for funding from abroad and the number of international co-productions grew (Kinnunen, 2019).

Regarding the different forms of international promotion, there has been a transformation: **the importance of film festivals has increased since the turn of the century when it was still possible for a film to find distribution without being screened at a big festival.** Today festivals



are essential, but only a small number of the biggest festivals, such as Berlin, Cannes and Toronto, can make a significant contribution to the distribution of a film (FINT1 and FINT4). **Private actors have also become central in this regard: two previous experts of the Foundation argued that international sales agents are in a more prominent position than the promotion experts of national agencies** because they have the closest relationships with the people who choose films for the festivals (FINT6 and FINT8).

Alongside festivals, pitching events have emerged as an important form of international promotion and are particularly important for emerging filmmakers. One interviewee stated that there are currently more pitching events for short films than ever before. Such events are held within a Nordic or Baltic framework and provide an invaluable opportunity for young filmmakers to network and explore potential international co-production opportunities. **Pitching events have become an essential tool for film financing**, given the reduced capacity of national media companies to finance films and the need to secure funds from diverse sources. The interviewee cited the example of Finnish filmmaker Aino Suni's debut film, *Heartbeast* (*Sydänpeto* 2021, Finland & France), as an illustration of a co-production that was made possible due to Suni's ability to find collaborators through pitching events (FINT4). The advisor's role here is that of a mediator, who tries to provide opportunities for emerging filmmakers. In the words of one interviewee: "I am a magnet that attracts filmmakers graduating from film and media schools and then tries to lure them to the next magnet" (FINT4).

Generally, the discussion about the **international promotion** was characterised by a dichotomy of feelings: on the one hand, there was a sense of pride in the Finnish support system, and on the other, there was frustration with the limited resources. The primary challenge of international promotion, as identified by several interviewees, is the dearth of financial resources. The resources have not increased in a commensurate manner with the number of Finnish films that have garnered international recognition or the production budgets of films. In the view of one interviewee, the number of successful films is disproportionate to the funds available. Throughout its tenure, the international department has undergone a single personnel expansion (FINT1).

A comparison was typically made with other Nordic countries, where the film institutes and foundations have considerably larger budgets. For instance, the Danish Film Institute has a budget of 15 million euros, while the Foundation's budget is less than three million euros (FINT1).



“Sometimes I think jealously of the funds of some other countries to do this promotional work with bigger funds, sometimes I feel that it has been a bit of a floundering, that you try to do something significant and visible with small funds. Sometimes it has been successful, sometimes maybe not so well.” (FINT2).

Referring to international distribution support, a relatively new form of support, an interviewee commented: “For example, in Norway they have a lot more money for a similar form of support. Sweden has a similar [form of support] with much, much more money available.” (FINT3).

It was not clear at the time of the interview in 2023 how the planned cuts to the budget would affect international promotion (FINT2). The Foundation’s action plan for 2024 states that its budget has been reduced by just under one million euros, which means that the funds are lower than in 2014. “2024 risks becoming a year focused on ensuring the continuity of our current activities, during which we will be less able to support and develop film and audiovisual culture than we would like (...)” (FFF, 2023b).

While Norway and Sweden were noted for having considerably bigger budgets for international promotion, it was acknowledged that more films are made in Sweden. Consequently, the interviewees were relatively satisfied with the current situation (FINT2). Despite the dearth of resources, the results of promotion are sometimes positive and even surprising. For example, the success of the Finnish director Hanna Bergholm’s horror film *Hatching* (*Pahanhautoja*, 2022) in Mexico was described as a pleasant surprise. *Hatching*, a co-production with Sweden, Norway and Belgium, was among the most-watched films in Mexico in the summer of 2022 with a total admission of 38,541. However, travelling to distant places like South America to do promotional work was considered problematic because of the high costs. (FINT2, 3).

In international promotion, the Foundation cooperates most closely with other Nordic countries, which is natural considering the geographical location of Finland. The Five Nordics helps Nordic cinemas have more visibility at film festivals and film markets by organising common stands and focus events. Cooperation is also strong in data gathering. The Nordic countries have explored the possibility of greater cooperation in the financing of co-productions as film budgets continue to rise. Financing co-productions together is challenging because each country makes production support decisions based on different criteria. After all, the institutions are governed by different kinds of laws. However, the institutes hope to increase conversations between the experts who make production decisions to enable more such co-financing (FINT1).



It could be argued that **the Foundation looks at Europe and European cinema from a very particular point of view**. The interviewees admitted that it is easier to think of European cinema from the perspective of Finnish and Nordic cinema than as a whole (e.g. FINT2 and FINT4). Especially those interviewees who worked in international promotion agreed that it may be more useful for Finnish cinema to be seen as part of a smaller group of countries, especially the Nordic countries, than as a part of the much larger cluster of Europe.

European Film Promotion (EFP) was generally considered a useful organisation for promoting European cinema outside Europe, for example in the US and Korea, where it is difficult for European countries to gain visibility alone, and possibly in the Arab countries in the future (FINT2). On the other hand, one interviewee was not convinced that EFP's support is enough and argued that European countries should trust in their own promotional capabilities because precisely the diversity among different European countries is valued outside Europe (FINT9).

Contrasting views on how international promotion should be done in the future emerged from the interviews. **Most interviewees stressed the importance of international promotion** while one interviewee would rather have seen the Foundation concentrate on the national market alone. This former Foundation expert suggested that the Foundation should let international sales agents, who know the markets best, take care of the global promotion. The same interviewee did not consider nation-state-oriented thinking reasonable in international promotion and suggested that film politics should be concentrated more on the EU level (FINT6). The boldest ideas came from those respondents who no longer work at the Foundation. Those who now work at the Foundation expressed almost no criticism of the current practices.

6.3.5. Values guiding the work of the Foundation

At the turn of the century, **the Foundation's perspective on supporting the film industry was still very national**. The diversity of filmmakers' backgrounds was not an issue at the time. The idea was that the cultural and linguistic diversity of European cinema was taken care of by ensuring that Finnish and Swedish language films were made (Interview 8). The term *diversity* was not used at that time. A comparable term used at the time was *versatility*, and the aim was to allow different voices to be heard. The term diversity was added to the Foundation's rules in the 2010s (FINT9).

As in the Spanish case, over the past ten years the Foundation has become more visible and active in the field of **gender equality**. It promotes equality "by supporting different filmmaker groups equally" and publishes statistics on gender equality in its yearly Facts & Figures publications (FFF,



2023a). The Foundation has arranged seminars on themes such as otherness in Finnish cinema and invited researchers to give talks. A significant, and crucial, impetus for these actions was the coming forward of women working in the film industry in Finland regarding the harassment they had experienced at work. They reported their mistreatment in news stories and on a TV current affairs programme in 2018. Film director Aku Louhimies was the target of several accusations by female actors. Irina Krohn, who worked as the CEO from 2006 to 2014, brought gender equality issues to serious discussion for the first time. She drew attention to the small number of female directors already at the beginning of her term in 2006 (Kinnunen, 2019, pp. 108–109; Suuronen, 2021).

Gender equality as an integral value of the Foundation's work came up frequently in the interviews, but there seemed to be some disagreement about how proactive the Foundation has been on this issue. Some interviewees mentioned that the Foundation was the first film institute in Europe to start compiling statistics on the realisation of gender equality in film funding in 2011 (FINT2 and FINT9). These statistics have been available in the Foundation's annual Facts & Figures publications since 2016. However, a previous expert of the Foundation argued that although female filmmakers raised the issue of inequality repeatedly, it took a long time before the Foundation started to pay proper attention to gender equality. The interviewee argued that it did so only when it was forced to react, and that the Foundation explained the situation by saying that the small number of funded female filmmakers only reflected the number of support applications (FINT6).

Today, however, the commitment to equality is strongly reflected in all the Foundation's public documents. The *Target programme for the cinema and audiovisual industry 2023-2026* says: "The film and audiovisual industry has also taken a very responsible approach to promoting equality between people and has been quick and effective in responding to grievances" (FFF, 2023b, 3).

When asked how European values such as cultural diversity are visible in the Foundation's activities, an interviewee replied that European values are included in the national film law, which guides the Foundation's activities (FINT7). Another gave this reply:

"We don't have quotas ... I have justified it ... by the fact that we are such a small country that we must find the best resources and the best projects. But, we train the advisors to be aware of their prejudices and also to understand diversity very broadly and this is reflected in the fact that although we don't have quotas, we monitor our support decisions over a period of a number of years... in one year there are so few decisions that one year doesn't really tell us anything, but with a three-year perspective we can see whether anything has changed." (FINT1).



In the *Facts & Figures 2014* publication, the Managing Director Irina Krohn gives an update on equality and diversity monitoring:

“The Finnish Film Foundation has compiled statistics for several years now on the gender representation of its support recipients. Last year over 40 percent of those receiving support were women. It is an interesting fact that Finland has the same share of female support recipients as Sweden and Norway where they have enforced a minimum gender quota. So far Finland has chosen a different approach to the matter by emphasising the principals [sic] of governance. The statistics show that in 2014 this has yielded just as good results in gender equality as the use of quotas.” (FFF, 2014, p. 5).

One of the interviewees mentioned that the Foundation is developing a new strategy in which European values are emphasised and that keeping statistics helps make such things visible (FINT3). The new strategy contains keywords such as responsible, supportive, ecologically sustainable, diversity, and accessible (FFF, 2024c). Such terms were often mentioned in the interviews. In addition to the latest strategy, the Foundation emphasises the values of social and environmental sustainability in its target programme for the years 2023–2026. According to these documents it aims to promote gender equality, equality in general, and environmental responsibility. The TP states that granting more financial aid to projects that invest in environmentally wise activity encourages the whole industry towards more sustainable practices but adds that the funding for such actions is insufficient (TP, 2023b, p. 18; Herrmann, 2024).

In 2024, the Foundation published an Equality and Non-Discrimination Plan and an Environmental Plan. The former states:

“Equality and equal treatment of people and support for diversity are core values of the Finnish Film Foundation. We are committed to promoting their implementation both in our own working community and in the Finnish film industry as a whole. As an employer, we aim to prevent all forms of discrimination and harassment. We create an inclusive working atmosphere through an open discussion culture and by valuing different backgrounds, experiences and opinions.” (FFF, 2024a).

The tool helps production companies monitor how equality develops in their productions.

When asked whether European co-productions contribute to the dissemination of European values one interviewee pointed out that cooperation is a value in itself and continued:



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“Cooperation is a value and, in the background, there is peace. That is, if we talk for real about these deep values, in my opinion the EU is a peace organisation, it has been built based on war-torn Europe, so all kinds of cooperation support it [peace]. It brings Europeans closer to each other from its own smaller or larger part and it affects the contents in a certain way. I do not mean Euro-pudding, but I hope that this way there will be more surface for identification for Europeans” (FINT7).

The same interviewee highlighted the film *Guled & Nasra* (2021), directed and written by Khadar Ahmed, as an example of the diversity of Finnish film production. It is a Finnish-German-French co-production and the world's first film entirely in Somali (FINT7). Although all interviewees emphasised the importance of cultural and linguistic diversity, which co-productions can promote, one interviewee pointed out that the Foundation is supposed to support stories from Finland first, and that there is a lot of cultural diversity in Finland that has not yet been dealt with in cinema. This interviewee was waiting to see stories of Finland's minorities, such as the Roma, who have been relatively invisible in Finnish cinema (FINT3). Another interviewee mentioned that the Foundation's important task is to support films that are mainly aimed at domestic audiences, which in turn helps to maintain the cinema network throughout the country (FINT7). According to one interviewee, Swedish and Sámi films are well-funded (FINT1), referring to the two minority languages of Finland.

Judging by the interviews and public documents, a big step has been taken in equality and non-discrimination policy since the turn of the century. The results are starting to show up in films too as far as gender equality is concerned. In 2023, 47% of the directors and 59% of the main roles of domestic feature fiction films were female. In production, women are still in a minority with 26% (FFF, 2024a). However, the cast of characters in Finnish cinema was still very white ten years ago and did not reflect the more diverse society very well (Hiltunen, 2016). This is changing gradually and will probably require a greater involvement of filmmakers with an immigrant background.

6.3.6. Future scenarios

The interviews also touched on the future of cinema, changing audience behaviour, and new technologies. **In terms of film policies, most interviewees believed that it should be organised at the national level in the future too.** They expressed the view that this approach is the only feasible way of organising film politics within the EU. Managing production resources is a national-level responsibility and should be in the future in order to preserve the diversity of European cinema. One interviewee stated that the EU's current instruments and legal framework are significant, but they should not have more binding power than they currently do (FINT8).



One interviewee explained that in many countries, **the national film policy currently expects filmmakers to focus more on domestic production than internationalisation**. Such a change of mentality has taken place in many countries, but it has not been much discussed in public. The current thinking according to this expert seems to be that “perhaps there is no need to make so many co-productions or speak of co-productions in the same way as 10–15 years ago”. The expert pointed out that film politics is connected to what is happening in the world. Now borders are being closed rather than opened and such matters are linked to competition about financing: “Will the production stay in the home country, or will it be moved abroad because of tax incentives? Whose filmmakers will be employed? Where will the shooting take place? And so on. Such things are perhaps more prominent now than earlier” (FINT9).

Two interviewees considered different approaches to film policy. One considered the possibility of synchronising national support systems at the European level to minimise the disparities between countries. Currently, European countries have significantly different resources for filmmaking, which means that in co-production, countries are not on the same line. **It would be ideal if all states could invest more equally in the film industry. The interviewee acknowledged that this is a politically challenging goal to achieve, as the EU does not have the authority to intervene in national budgets** (FINT8).

The most radical idea came from an interviewee who argued that it would be better if the EU had a bigger role in film politics, particularly as regards production support. According to this vision, filmmakers from each member state would be required to apply for funding from the EU and the goal would be to raise the quality of cinema. National support would still be available for less ambitious projects or popular films aimed mainly at national audiences (FINT6). Dividing national productions into different categories appears an unsustainable solution because in the past the Foundation was criticised for supporting mainly artistic films instead of audience-friendly films.

“It was expected to lead to more diverse supply, but I haven’t seen such – in fact it is the opposite” (FINT8). This is how one of the interviewees commented on digitisation, especially the decrease in distribution costs. The digitisation of the whole production chain, from production to distribution, has accelerated processes and increased demand. New lightweight technology allows for quick premieres and films can be shown in cinemas for shorter periods. In principle, films are immediately available everywhere. However, the interviewee pointed out that **the traditional value chain is still partly in place**, as most films are still first shown in cinemas (FINT8).



Technology enables other ways of distributing and showing films simultaneously and, according to two respondents, these should be used more in the future. There should be more alternative modes of release depending on the nature of the films. The expert explained that based on experiments made in Hollywood, theatrical release is good for most films but for some, it makes no difference, because audiences for those films are not necessarily in cinemas. According to the interviewee, such alternatives are not yet equally available for European and domestic films (FINT9). Another interviewee argued that theatrical distribution cannot be an obligatory criterion for the Foundation's support in the future and that there will be reasons to support films that will only be available online or on a streaming service, such as Netflix. For this to happen, however, the payment obligation for online services, which the AVMS Directive makes possible, should be implemented in Finland (FINT1).

The discussions often returned to the question of audiences and that for European cinema to flourish it needs to interest audiences. However, the rapidly transforming media landscape makes it very difficult to predict their behaviour (FINT4). The experts assumed that audiences would become more fragmented in the future, which means at least two things. First, people watch films in many different places and through an increasing number of devices. Second, the average audience of a single film will decrease (FINT9).

There was agreement that cinema movies will survive but they will change, with one interviewee pointing out that the idea of end or death of cinema is as old as cinema itself (FINT4). Another pondered that cinema is still a relatively new art form and that perhaps it has not yet quite found itself (FINT6). In general, the interviewees were cautiously optimistic.

“I don't see that it [the status of cinema] is threatened as long as there is interesting content. (...) Let's say, on one side there are the *barbenheimers*, and on the other the more challenging so-called arthouse films. The films in between are currently not finding an audience. (...) The polarisation that can be seen elsewhere can also be connected to the world of cinema. But I don't see that film as a form is disappearing anywhere. (...) Cinemas need to change as the world changes. (...) Communal, watching together, experiencing together is very important (...) Film is still, so to speak, the culture of large audiences, which is a great thing” (FINT7).



7. CONCLUSIONS

The assessments in the previous chapters have tended to **highlight, in terms of content and form, the differences between the three case studies in their dimensions and capacities, in their areas of intervention or level of politicisation. While working with the same questions, analysing similar areas and policies, this investigation has produced different answers, indicating different concerns and issues in the work of the agencies. Pointing at this diversity can be thus seen as one of the first outcomes of the report.**

From a diachronic perspective, the chapters have also contributed to identify the policies through which the three film agencies have promoted competitiveness in their national film industry. They analysed their impact on the promotion and the defence of national and (to a lesser degree) European cinema; they also pointed out how the institutions and the national film contexts in which they were embedded reflected three very diverse industrial, cultural and historical backgrounds.

To sum up the results and highlight the comparative aspects of this analysis, the report presents now its findings in three blocks: a) Institutions and their structure, organisation and functions; b) Measures and policies, evolution and outcome; c) The impact of the activities of the agencies, especially in relation to the ideas of 'European' and 'competitiveness'.

a) Institutions and their structure, organisation and functions

The internal structure of the ICAA for the years under analysis had been already determined by the Royal Decree Law (Real Decreto 7/1997), which also outlined its main goals. That legal framework specified the areas of intervention, which remained quite constant over the next three decades. There were however important transformations within this structure: the institution grew in complexity, professionalisation (in spite of a constant complaining about a lack of qualified personnel) and enjoyed a general increase (with certain detours) of the budget (see table 1). An important impulse came with the development of the 2007 Law (itself a good example of the capacity of the institution to shape the national film industry and of the ICAA's role in the development of legislation). Another significant transformation occurred in 2010 with the creation of a Directorate of Marketing Policy: it signalled the interest in promoting an area which had been traditionally underfinanced (marketing and promotion); it also pointed out the interest in increasing the forms of collaboration with the industry and exploring effective ways of promoting the national productions.



Similar to the Spanish and Finnish cases, as well as other European countries, the areas of intervention of the PISF – a much more recent creation – include a wide range of film support activities in the fields of production, film literacy, promotion of film culture at national and international festivals, co-production and European support programmes, alongside financial support of cinema infrastructures. Its management body (composed of filmmakers, producers, distribution agencies, etc.) also makes PISF comparable to other European cases. But the analysis has also highlighted crucial peculiarities: while there is no official data on the number of PISF employees and the dynamics of staff exchange after the parliamentary elections, our research points out a high level of political interventionism in the Institute's management, which – throughout the last 20 years – has been regarded as highly dependent on current governmental policies as laid down at the Ministry of Culture and National Heritage. On the surface, the assessments of PISF performance and the competitive value need to be read against the background of a clash between liberal and high state intervention (and higher public support) in the 1990s, as well as the power alterations between the conservative-right Law and Justice and the centre-right Civic Platform coalition governments between 2005 and 2025. In addition to being prone to political influence, our research on PISF points to decision-making centralisation, bureaucratisation, nepotism and management practices of “tsarist style”, as one of the interviewees bluntly pointed out.

Unlike the problematic episodes that marked the evolution of the PISF, the history of the Finnish Film Foundation is one of institutional stability and continuity. The principal organisational changes that the FFF has undergone over the past 25 years have been precipitated by the implementation of the novel film legislation in 2019. The legal framework stipulated that the members of the Foundation's Board of Directors must adhere to principles of impartiality. Consequently, the responsibility for final funding decisions was transferred from the CEO to the board. Additionally, the law brought about a reduction in the decision-making authority previously held by the advisors working within the Department of International Promotion. However, with the exception of minor alterations in the names of certain departments and personnel, the Foundation's internal structure has remained largely unaltered. While the functions of the Foundation remain mostly unchanged, new forms of support have been introduced. For instance, in 2021, a new initiative was launched to support the international theatrical distribution of Finnish films.

b) Measures and policies, evolution and outcome

In most (Western) European countries the evolution towards a more market-oriented model of film policies started already in the late 1980s, with the development of a system that highlighted diversity



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(the promotion of new voices in the support of both commercial and arthouse projects) and the gradual integration of cinema in a broader audiovisual landscape. Parallels are clear to the transformations in Poland after the fall of communism and the opening to a free-market economy in the 1990s, which interviewees also interpreted as a process of opening to new possibilities.

Around the beginning of the 21st century the support shifted generally towards a liberal model of policy in its growing commitment to tax incentives. Its implementation proved problematic in the Spanish and Polish case; in Finland, in an evolution that also echoes the Spanish case, tax incentives have been administered since 2017 by Business Finland, not by the Foundation. Parallel to that, the areas of support shifted towards a broader form that included promotion, film literacy, international dissemination and eventually embraced the idea of “audiovisual culture”.

In quantitative terms, the general transformation produced positive results. Finnish cinema, for instance, is more competitive internationally today than it was 25 years ago without an increase in the resources devoted to international promotion in the last decade. Its popularity in the domestic market has also increased. An important reason for the improvement in the domestic situation lies in the changes that were made to the Foundation's policy at the turn of the century. Polish and Spanish interviewees would offer similar evaluations, also rooted in changes taken place almost simultaneously (the founding of the PISF in 2005 and Spain's 2007 Law).

Focusing now on the three case studies individually, the evolution of the ICAA showed first continuity: support of (independent) film production remained central through different increasingly varied programmes, while other areas were gaining in relevance. The problematic implementation of certain policies following the 2007 Law showed that this transformation (a further focus on global promotion, distribution and exhibition, a growing interest in media literacy, support of women filmmakers) usually faced relevant hurdles. At the beginning of the second decade of the new century, there were also attempts to open up new lines of support based on tax incentives to attract more commercial projects. Have these forms of policy intervention contributed to increasing the competitiveness of national production? A look at the box office results of the Spanish productions does not really provide a definitive answer, as no clear conclusion can be drawn from the last 25 years: Spanish films attracted at the box office 15% of the spectators in the years 2009, 2011, 2019, 2021; in 2014 and 2020 the numbers went up to 25%; apart from exceptional events such as the COVID-19 pandemic, the variations are usually explained by the success of specific titles. However, these numbers can be also read as proof of the resilience of an extremely competitive industry that has been facing constant challenges in the period of analysis: the chronic dominance of the US majors in the distribution



sector, digitisation, piracy, global finance crisis, impact of global streamers and COVID-19 pandemic. Both the growth of the national audiovisual sector and the artistic success of Spanish productions (see 6.1.2. for the success of women filmmakers in the last years) hint at the general positive development of the national film industries in forms that urge us to redefine competitiveness for a sector constantly in flux.

The historical evaluation of the Polish Film Institute's performance and its contribution to competitiveness needs to take into special account the cultural and political path-dependencies. The research on the Institute highlighted the importance of the pre-1989 period (on the edge of authoritarian regime) and – what we call here – the transformative 1990s for creating the foundations of the current management and structures. Findings from document analysis and semi-structured interviews indicated how a certain nostalgia for the film and audiovisual successes from the socialist-communist times became an agent of change in regulatory and work practices in order to find a balance between public service and the private industries. The so-called public benefit at the core of the PISF activities and decision-making has been naturally redirected into Europeanisation and Westernisation, with Poland joining the European institutions and funding schemes and programmes, alongside with producers, policy-makers and media participating in the overall broader debates on European identity and related competitive values. Among the key takeaways we can count a greater international visibility and findability of Polish films, the focus on co-production, the blooming of cinema infrastructure alongside the presence at international film festivals, and the support of artistic and culturally-relevant productions that counter global tendencies.

At the turn of the millennium, the FFF took significant measures that contributed to the positive development of Finnish cinema. The budget of the Foundation was increased, which resulted in enhanced financial support for filmmakers. The support decision system was renewed, and distribution and screening were also being considered in the project evaluation as part of the entire production chain of the funded film projects. A key development was the Foundation's strategic investment in audience-friendly genre films, a decision that has had a positive effect on the Finnish film industry. Despite the Foundation's budget not increasing at the same rate as the costs of filmmaking, the rise of Finnish cinema has continued in the 2010s and later. This means for example an increasing number of screenings and awards at international festivals and cinemas and continued domestic interest in Finnish cinema. In 2023 the Finnish film *Immortal* (J. Helander, 2023) attracted over a million viewers in foreign cinemas, more than any other Nordic film in the same year. Also noteworthy is the Finnish Film Foundation's commitment to an equal and diverse film industry, which is reflected, for example, in the strong rise of women filmmakers.



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Table 9. Comparative table of national film agencies (Spain, Poland and Finland). Source: prepared by the authors.

	ICAA	PISF	FFF
Main programmes and forms of support	- Production: 1 and 2) Feature film production (two types; general and selective) 3) Short-film projects 4) Short-film productions - Distribution (independent distributors) -International distribution of Spanish films (festivals, award ceremonies, etc.)* - Organization of film festivals in Spain - Participation of Spanish works at international events* - Participation at renowned international film festivals. - Exhibition (cinemas) - Labs and audiovisual incubators*	* Operational programmes: - Film production - Film education - Dissemination of film culture - Cinema theatres development - International promotion of Polish film - Polish-Ukrainian film initiatives (suspended in 2024) * 30 % Cash Rebate incentives (a 30% reimbursement of production costs incurred in Poland as part of the eligible expenditure)	- Scriptwriting grant - Support for production: development support; slate development support; production support; 50/50 production support - Support for distribution: marketing and distribution support for feature films; marketing and distribution support for documentary and short films; support for audio description and subtitling for the hearing impaired; import support; operational support for film festivals; training support - Support for cinemas: regional operational support for cinemas; support for cinema equipment and modernisation; training support - Support for international promotion: project support for international promotion; material and marketing support; travel support - Promotion of other film culture



General areas of intervention	[as in the Royal Decree-Law of 1997] - Development of projects, increase of production and promotion of the distribution of Spanish productions. - Seeking an acceptable proportion of the internal market share that allows the maintenance of the entire Spanish cinema. - Improvement of the competitiveness of national companies, including the application of new technologies. - International dissemination of Spanish cinema and audiovisual arts. - The safeguarding and dissemination of Spanish film heritage. - Cultural communication between the Autonomous Communities on questions of cinematography and audiovisual arts.	[based on the Cinematography Act of 2005] - Creating conditions for the development of Polish film production and co-production, - Inspiring and supporting the development of all genres of Polish film-making, in particular artistic films including the preparation of film projects, production and dissemination, to support activities aimed at creating conditions for universal access to the Polish, European and world film output, - Supporting film debuts and the artistic development of young filmmakers, - Promoting Polish film-making, - Co-financing undertakings in the field of preparation of film projects, film production, distribution and dissemination, promotion of Polish filmmaking and dissemination of film culture, including the production of films undertaken by the Polish abroad community,	[based on the Foundation's strategy for the years 2018–2023] - Production of Finnish cinema - Distribution - International promotion and cultural export of Finnish cinema - Finnish film culture - International development work of the field - Communication with industry operators and stakeholders - Promotion of fair and equal operation culture in the film industry
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		- Providing expert services to public administration bodies, - Supporting the maintenance of film archives, - Supporting the development of the potential of the Polish independent cinematographic industry, in particular small and medium-sized entrepreneurs active in cinematography, - Supporting audiovisual production under the rules set out in the Act of 9 November 2018 on financial support for audiovisual production, - Assigning an individual identifier to each film screened in a cinema identifier published on the Institute's website in the Public Information Bulletin, - Supporting solutions facilitating familiarisation with the cinematographic output to people with visual and hearing disabilities.	
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(*) These programmes have been supported by EU-Next Generation funds



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c) The impact of the activities of the agencies, especially in relation to the ideas of 'European' and 'competitiveness'

A review of the last 25 years of ICAA history, policies and legislation reveals a general shift towards more liberal, market-friendly policies. While traditional (national) readings tend to see this evolution as an effect of party policies and changes in the state government, its broader contextualisation hints at more general trends in line with a general shift in European cultural policies and in the examples of the FFF and PISF.

In addition to this specific characterisation, **competitiveness (at least, in simple, industrial terms) seemed to be too limited a term to assess the form of support that the agencies have been offering.** First, since agencies understand their work to an important degree in cultural terms. The policies of the ICAA show that, in line with the changes already pointed out (for instance, the growing intervention in other areas beyond production), artistic quality and diversity are still seen as a strength of both domestic and European cinemas. Or, as one of the Spanish interviewees bluntly pointed out when pressed to define the work of the ICAA in relation to industrial competitiveness: "I do not think that having a strong industry [automatically] generates valuable films." (SINT1) This points at a tension that goes beyond the traditional conflict between culture and commerce. Put in mere industrial terms: an idea of competitiveness too focussed on big commercial success may be a too limited approach to the realities of an industry like the European, whose main assets are (still) industrial diversity and sustainability.

The analysis of 20 years of activities at the Polish Film Institute and its overall performance shall be seen as – what we call – an interplay between money and culture. On the surface, interviewees lamented the lack of sufficient financial support for the Polish film industry referring to the pre-free market and independent era and to the current support structures. A key question that kept being posed was: why does the Polish movie still sell so poorly? Beyond the data evidencing PISF's contribution to the European values, one question that remained unanswered is to what extent the existing practices and policies serve the societal cohesion, and pluralistic voices regardless of the political line of the government in power. The blend of the so-called conservative and liberal ideas has become critical in the recent development of the Institute; the additional questions on the PISF's contribution to the growing socio-political conservative vs. liberal cultural polarisation since 2015 should be addressed against this background.



In Finland, the current and former experts of the Foundation considered diversity to be of paramount importance to both European and Finnish cinema. The increased diversity of voices and creators was identified as a positive development in domestic cinema. Conversely (and echoing also concerns expressed in the Polish and Spanish parts), the present situation of European cinema as a whole was not evaluated with equally positive terms. While acknowledging diversity as a principal attraction of European cinema for international audiences, a significant challenge remains in the generation of cinematic phenomena and events that can capture the interest of large audiences. The interviews indicated that the concept of competitiveness is understood in a variety of ways within the Foundation. A thorough examination of the data reveals that the notion of competitiveness has only emerged as an explicit objective since the turn of the millennium. In recent years, the significance of the Finnish film industry, both in terms of its economic impact and cultural value, has been increasingly emphasised.



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8. POLICY RECOMMENDATIONS

Rather than focusing on future developments, this report was primarily interested in drafting a historical narrative of the transformation of the film agencies. Nevertheless, given the identification of certain phenomena, recurring themes and common challenges in the history of the ICAA, PISF and FFF, this last chapter presents a series of general recommendations around three areas that, while looking at the past, also help illuminate the present and future of European film. These are a) the institutional aspects of the work of each film agency, as well as their changing approach to b) the questions of film competitiveness and of c) the European film industry.

Despite crucial differences, which were directly addressed in chapter six, the interviews point to an overall demand for more institutional support for the work of the agencies. Support usually translates into **more (or at least more constant) funding**, as interviewees see the agencies' independence and effectiveness limited by their dependency from the state budget. Insufficient funding is usually brought up regarding both the internal structures of the institutions (ICAA's interviewees stress that the staff currently working at the institution is clearly insufficient), and the increase of the effectiveness of their interventions. While France usually functions as reference on a European level, the FFF has more specific claims; its funding should be increased to bring it closer to the level of other Nordic countries and ensure its growth potential.

More support, it was argued, would also translate to other areas regarding the internal structure of the institution and its competences, as well as their **independence**. In the Polish case, there has been an ongoing concern about how the rigid structure and hierarchies led punctually to a lack of coordination among different areas and limited the PISF in its daily activities. Similar concerns were voiced by representatives of the FFF and of the ICAA.

The call for greater support can also be read as an interest in keeping an **arm's length distance between politics and the work of the institutions**. Also in this regard, the three institutions showed significant variations: In Spain, this report helped to nuance general claims about an alleged politicisation of the ICAA, showing first its autonomy (though very influenced by the person in charge) and also the development of a coherent line of action in the 25 years under consideration. Looking back at the (comparatively short) history of the PISF, these considerations gain further urgency. The evaluation in chapter six illustrated how political power exerted its control and influence on the institution and on the way it channelled its funding of film productions, festivals or media literacy initiatives. As stated by one of the interviewees, the Polish Film Institute followed the state-owned institution's principles that the appointment and performance of its Director "should be a political



decision”. Compared to this example, the FFF’s history since the turn of the century is one of stability. Some interviewees however lamented a **lack of appreciation** of the film industry on the part of the Ministry of Education and Culture, which finances the Foundation, which, in their eyes, results in insufficient allowance; similar claims could be found in the context of the ICAA and PISF.

A. We therefore recommend exploring other forms of administrative autonomy that keep a distance between politics and decisions on support of cinema and help secure the long-term viability and effectiveness of the institutions’ work.

One way of understanding the transformations indicated in the previous chapter is that national film agencies have also learnt to face their work **adopting a more holistic and analytical approach** that highlights that film support cannot and should not be limited to **film production**. Especially in the past, distribution, exhibition or media literacy programs were not given the importance they deserved; a common lament is about the lack of international circulation of national productions, while interviewees recognised a lack of effectiveness in the agencies’ policies.

While showing the importance of the agencies in the support of each nation’s cinema, the report was also especially interested in highlighting how competitiveness proved a concept difficult to define, which adapted to different historical and market circumstances as well as commercial and cultural goals.

B. Thus, looking back at this constant transformation, but also at the necessity to react to both cultural and market diversity, we recommend national film agencies to take the diversity of contemporary audiovisual culture more strongly into consideration in their funding and support systems, adapting thus to different forms of distribution, exhibition, and consumption, as well as to the diversity of productions and audiences without forgetting its primarily cultural commitment.

A successful European film industry can only be competitive if it fosters its diversity, while at the same time accepting that, with the exception of France, “where cinema is a state subject, **the problems of the European cinema are the same the national productions face**” (SINT1), as one of the interviewees pointed out.

Looking back at 25 years of experience, the interviewees highlighted the FFF’s collaboration with other small film industries as essential for ensuring competitiveness in the European market, which they saw as dominated by countries with larger film industries such as France, Germany, Italy, Spain, and the UK. They highlighted the contacts with the Nordic but also the Baltic countries. At the same



time, **collaboration through umbrella organisations**, such as The Five Nordics, was considered necessary for small Nordic film industries. PISF's cooperation with the German Medienboard Berlin-Brandenburg GmbH, Mitteldeutsche Medienförderung GmbH, and Filmförderungsanstalt proved also central for the realisation of recent successful films such as *The Zone of Interest* (J. Glazer, 2023). An interesting addition to this approach came however from ICAA's history. While co-productions are still seen as a way of securing international presence of national films (also with Latin America), retrospective valuations of successes and shortcomings indicated how much work can still be done by national agencies (or their European coordination with EFAD), towards the facilitation of international cooperation among **distribution** companies. Agencies seem to consider, like other significant stakeholders, that distribution is still the key area of intervention in the EFI.

C. Finally, we recommend that in addition to their central role in supporting culturally valuable productions, national film agencies focus more of their resources on promoting international agreements, especially those that enhance the accessibility to and distribution in international markets.



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9. LIST OF ABBREVIATIONS

AFP	Agencja Produkcji Filmowej (Film Production Agency)
AVMS	Audiovisual Media Services Directive
CNC	Centre National du Cinéma et de l'Image Animée
CNMC	Comisión Nacional de los Mercado y la Competencia (Spain's National Markets and Competition Commission)
ECAM	Escuela de Cinematografía y del Audiovisual de la Comunidad de Madrid
EFAD	European Film Agency Directors Association
EFP	European Film Promotion
ESCAC	Escuela Superior de Cine y Audiovisuales de Cataluña
FAPAE	Confederación de Productores Audiovisuales Españoles (Spain's Confederation of Audiovisual Producers)
FFF	Finnish Film Foundation
ICAA	Instituto de la Cinematografía y de las Artes Audiovisuales (Institute of Cinematography and Audiovisual Arts)
PISF	Polski Instytut Sztuki Filmowej (Polish Film Institute)
TVWF	Television Without Frontiers (EU's Directive)
UTECA	Unión de Televisión Comercial en Abierto (Spanish national association of private free-to-air broadcasters)



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10.2. Annexes

Country	Code number	Details of the interview (date, place, length in min.)	Description
SP	SINT1	11.10.2023, Madrid, 1h 23 min.	Former/current director of the ICAA
SP	SINT2	12.12.2023, Madrid, 1h 33 min.	Former/current director of the ICAA
SP	SINT3	18.12. 2023, Madrid, 1h 26 min.	Former/current director of the ICAA
SP	SINT4	20.09.2023, Madrid, 1h 47 min.	A high ranking representative of the Cervantes Institute
SP	SINT5	14.04.2023, Google Meet, 1h10 min.	A high ranking representative of the Spanish national office of the MEDIA program
SP	SINT6	14.03.2024, Madrid, 1h 32 min.	Spanish Association of Women in Cinema and Audiovisual Media CIMA
SP	SINT7	31.01.2024, Madrid, 1h 31 min.	A representative of Acción Cultural Española (AC/E)



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PL	PINT1	19.01.2024, Google Meet, 1h 29 min.	Former director of a film unit in a public entity; high-ranking audiovisual policy-maker
PL	PINT2	23.01.2024, Google Meet, 1h 22 min.	Current director of a film in a public entity; artistic director of festivals
PL	PINT3	02.02.2024, Google Meet, 1h 11 min.	Former spokesperson; high-ranking member of the association
PL	PINT4	05.04.2024, Google Meet, 1h 23 min.	Film programme coordinator
PL	PINT5	24.01.2024, Google Meet, 1h 24 min.	Film research specialist in an organisation
PL	PINT6	15.03.2024, Google Meet, 1h 28 min.	Supervisor in a film production awarded with an Oscar
PL	PINT7	19.03.2024, Google Meet, 1h 12 min.	Former member of staff of the European Commission institutions for film production
PL	PINT8	12.03.2024, Google Meet, 1h 25 min.	Producer of short films
PL	PINT9	17.04.2024, Google Meet, 56 min.	Former director of a film unit at a public entity
PL	PINT10	15.10.2024, Google Meet, 1h 08 min.	Former deputy director of research and development for film at a film organisation
PL	PINT11	13.03.2024, Google Meet, 1h 14 min.	Film production manager
FI	FINT1	30.8.2023, Zoom, 1h 17 min.	A representative of the Finnish Film Foundation
FI	FINT2	5.9.2023, Zoom, 1h 33min.	A representative of the Finnish Film Foundation
FI	FINT3	2.10.2023, Zoom, 1h 13 min.	A representative of the Finnish Film Foundation
FI	FINT4	3.10.2023, Zoom, 1h 37 min.	A representative the Finnish Film Foundation
FI	FINT5	5.10.2023, Zoom, 1h 49 min.	A representative of the Finnish Film Foundation



FI	FINT6	23.10.2023, Zoom, 1h 39min.	A former expert at the Finnish Film Foundation
FI	FINT7	15.11.2023, Zoom, 1h	A representative of the Finnish Film Foundation
FI	FINT8	21.11.2023, Zoom, 1h 28 min.	A former expert at the Finnish Film Foundation
FI	FINT9	27.11.2023, Zoom, 1h 18 min.	A former expert at the Finnish Film Foundation



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Disclaimer

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