

DIRECTORATE-GENERAL FOR INTERNAL POLICIES

**POLICY DEPARTMENT B**  
STRUCTURAL AND COHESION POLICIES



Agriculture and Rural Development

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**RESEARCH FOR CULT COMMITTEE -  
"CREATIVE EUROPE - MEDIA:  
IMPLEMENTATION, FIRST  
EXPERIENCES"**

STUDY





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CULTURE AND EDUCATION

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This document was requested by the European Parliament's Committee on Culture and Education.

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**Abstract**

Creative Europe brings together the former Culture, MEDIA and MEDIA Mundus Programmes to support the cultural, creative and audio-visual sectors. The new programme renews supports for development, distribution and promotion but introduces encouragement of innovative business models, of international co-productions, and of cross-cultural projects as well as training in film literacy and audience development.

Responses to the anonymous questionnaire sent to the Creative Europe Desks (CEDs) reveal the main challenges in the implementation of the programme and the main difficulties experienced by applicants. The conclusions and recommendations fall into three categories.

Communication between CEDs, EACEA and the two DGs could be even better and CEDs should be encouraged to develop greater collaboration with local applicants.

The EACEA should work harder to develop optimal e-tools adapted to its different targets and must revise the participant's portal in a user-friendly approach.

Guidelines are well adapted to professionals' needs, but a review of the automatic points system, which many consider anticompetitive, must be launched.

Finally, CEDs have a key role to play in the future success of the programme.



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## LIST OF ABBREVIATIONS

<b>CED</b>	Creative Europe Desks
<b>EC</b>	European Commission
<b>EACEA</b>	Education, Audio-visual, Culture Executive Agency
<b>ECAS</b>	European Commission Authentication Service
<b>PIC</b>	Personal Identification Code
<b>LEAR</b>	Legal Entity Appointed Representative
<b>MD</b>	Media desk
<b>VOD</b>	Video on Demand
<b>VR</b>	Virtual Reality



## EXECUTIVE SUMMARY

Launched in January 2014, Creative Europe brings together the former Culture, MEDIA and MEDIA Mundus Programmes (2007-2013). The European Union's new programme is designed to support the cultural, creative and audio-visual sectors along the value chain by financing the development, distribution and promotion of films, series, animation, documentaries, video games, festivals, cinema networks, training and cross-cultural projects.

The methodology used in this study is that of the open-ended questionnaire sent to the heads of the Creative Europe Media Desks. The anonymity of their responses was guaranteed. The Creative Europe Media sub-programme renews to a large extent the Media 2007 lines of support: networking, building capacities for the development of works and distribution of non-national European works on all media. Creative Europe also introduces new lines of action such as encouragement of innovative business models and international co-productions, as well as training in film literacy and audience development.

Analysis of the responses to the questionnaire reveals the principal challenges identified by the Creative Europe Desks (CEDs) in their day-to-day implementation of the new programme and the main difficulties experienced by applicants with the programme's tools, but also with its guidelines, deadlines, information and new selection criteria, which bring to light imbalances between countries. The conclusions and recommendations fall into three categories.

- CEDs/EACEA/DG relationship

Communication has improved but could be even better to give the CEDs the feeling that they are a true part of the system. "Talk to them" is the baseline.

Due to their important role in applicants' success, CEDs should have better access to more detailed information on the assessment of unsuccessful applications and should be encouraged to develop greater collaboration.

- Tools

The EACEA should work harder to develop optimal e-form contents adapted to its different targets.

The Participant Portal needs to be revised with user-friendliness in mind, like NING, a useful tool that can nevertheless be improved with more frequent updates.

- Guidelines

The sub-programme is considered relevant and well adapted to professionals' needs in the digital age, but there is strong demand for one specific change: a review of the automatic points system, which many consider anticompetitive. The automatic points system for low/intermediate/high production capacity countries should be revised and the three-layered system should be applied in all calls for proposals.

In conclusion, in the current context of heightened digital competition, multiplication of distribution channels and scarce public funding, CEDs have a key role to play in the future success of the programme, especially if the overall budget is increased.



## 1. CONTEXT

As Europe celebrates 25 years of support to European culture and audio-visual creation<sup>1</sup>, the question of the number of candles on the birthday cake is debatable. Should there be just one candle for Creative Europe or two, in other words one for each of the sub-programmes? Indeed, since 2014 substance and form have both evolved, with deep-seated changes to functioning, management and communication, while each of the sub-programmes is still administratively attached to two different DGs, Culture to DG EAC and Media to DG CONNECT.

Launched in January 2014, Creative Europe brings together the former Culture, MEDIA and MEDIA Mundus Programmes (2007-2013). This European Union programme is designed to support the cultural, creative and audio-visual sectors. A budget of €1.46 billion was adopted to support European projects with the potential to travel, reach new audiences and encourage skills-sharing and development needed in the digital age. Creative Europe also aims to support and safeguard cultural and linguistic diversity.

The Media sub-programme supports the EU film and audio-visual industry along the value chain by financing the development, distribution and promotion of films, TV series, animation, documentaries and video games, festivals, cinema networks, training and cross-cultural projects.

**“The MEDIA sub-programme of Creative Europe supports the EU film and audio-visual industries financially in the development, distribution and promotion of their work. It helps to launch projects with a European dimension and nurtures new technologies. It enables European films and audio-visual works including feature films, television drama, documentaries and new media to find markets beyond national and European borders; it funds training and film development schemes”.**<sup>2</sup>

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<sup>1</sup> Media I (1991-1995), Media II (1996-2000), Media Plus (2000-2006), Media 2017-2013, Creative Europe (2014-2020).

<sup>2</sup> <https://ec.europa.eu/programmes/creative-europe/>



## 2. METHODOLOGY

The methodology of this study is that of an open-ended questionnaire sent to the heads of the former Media Desks, renamed Creative Europe Desks in the new programme. (Annex I).

A first list of possible questions has been drafted by DIFFA and completed with the support of the Policy Department. Ten questions were selected to cover all aspects of Creative Europe Media subprogramme implementation (changes, relationships with DGs and EACEA, with applicants, trends). Due to a short time period, it was decided to focus the research on CEDs.

The CEDs have the capacity to provide particularly interesting viewpoints since their heads are in daily contact not only with the European institutions on which they depend (EACA/DG CONNECT/DG EAC) but also with the national institutions to which they are attached (ministries and various cultural/audio-visual institutions) as well as with the professionals served by the Desks.

Given their position as the working tool of the European programme, directly serving the professionals in their country, the CEDs are in a position to relay essential first-hand information on implementation of the new programme and, for the vast majority, to compare the advantages and any weaknesses of the new programme with those of the previous programme.<sup>3</sup> The open-ended questionnaire was therefore considered the methodology of choice.

After initially considering administering the questionnaire in face-to-face or telephone interviews, certain contacts suggested that, given the subject of the study, it would be more useful to keep the answers anonymous.

During the survey, it became clear that question 8 was not relevant to media subprogramme (all respondents agreed to say the question was not relevant and it was decided to not elaborate upon it in the report).

The outspokenness of a very large number of the responses confirmed this method as the correct choice and valuable for offering insight into the reality of the programme's implementation from the start.

Media Consulting Group therefore set up a simple process on its website that gave all respondents the same password and log-in. It was consequently impossible for the team to attribute responses to one Desk or another save where the name of certain countries or Desks appeared in the body of the responses.

The questionnaires in English were sent to the 50 CEDs. For the (seven) countries having several CEDs, it was possible either to submit one answer for the whole country or to allow the country's different Desks to respond individually.

Media Consulting Group received 32 responses (Annex II). Four countries covering 10 Desks decided to submit one response for the country. Two countries chose to leave the answers up to the different Desks. The proportion of CEDs covered by these responses therefore amounts to 83.35% of all the Media CEDs.

The first stage of the work once the responses had been received was to group all the responses to each question to have the complete view of the CEDs on a given item of the survey and to highlight the key points of satisfaction or of problems, but also to bring to light divisions (e.g. small countries vs large) and areas of consensus (the need for relevant information).

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<sup>3</sup> 43 already managed the Media 2007-2013 programme.

The pledge of confidentiality was respected in drafting this report. Certain quotations are reproduced but without identifying the respondent. All answers received are available to the European Parliament's Committee on Culture and Education<sup>4</sup>.

Likewise, references to certain countries are also deleted and only summaries of the responses to the ten questions are kept.

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<sup>4</sup> The responses represent a total of 122 pages.



### 3. FROM MEDIA 2007-2013 TO CREATIVE EUROPE MEDIA SUBPROGRAMME

#### 3.1. A brief presentation of the main changes

In 2014, the Media and Culture programmes merged into Creative Europe with a budget of €1.462 billion for the years 2014-2020.

Of this total, the Media sub-programme is allocated €818 million, or 56% of the budget. A cross-sectoral strand was set up from 2016, accounting for 13% of the budget.

This new Creative Europe Media Sub-programme renews to a very large extent the Media 2007 lines of action, confirming the principle of support for the key players in the audio-visual value chain (producers and distributors, among others) and providing support for networking, building capacities in terms of development of works and giving special attention to the distribution of non-national European works on all types of media. In the value chain, pre-production covers three strands: training, development and access to markets, while support for producers and production covers TV coproduction and the co-production funds.

Support for distribution covers: support for distribution and sales agents, festivals, cinema networks and audience development (which includes film literacy).

Certain strands found in Media 2007 no longer exist in Creative Europe, such as pilot projects, initial training (which is transferred to Erasmus+) and i2i, while new strands are added, i.e. audience development, the co-production funds and the guarantee fund.

The other strands also underwent certain changes in Creative Europe:

- A focus on continuing training (including projects with non-EU countries).

- Development still includes former strands (single projects and slate funding) plus a new strand of video games.

For producers, the I2I initiative is terminated, but the programme now includes co-production funds as well as the guarantee fund and support for financing of cross-cutting actions from 2016. Support for development remains unchanged in its principle but like other lines of support undergoes significant changes in terms of its functioning.

The cinema network action 3 line of support is withdrawn and the more general cinema network support now includes ex-Media Mundus non-EU countries. And the support to festivals and support to market access strands now include partnerships with third countries.

In addition, as mentioned above, two new lines of action are launched: audience development and co-production funds.

#### 3.2. Who are the new beneficiaries

They are of course all the former categories concerned by the strands that remain unchanged, but also new entrants under the co-production funds and film literacy initiatives.

##### The new lines

1. Audience development. With a budget of €1.9 million in 2014, this line is meant to support around ten projects per year having the objective of stimulating the interest of the European public, in particular the young and very young public.
2. This line comprises two aspects:

- Audience development: (events, multi-territory marketing to promote non-national European films on various platforms)
  - Film literacy projects to support European cooperation aiming to develop the value of their European dimension and promote good practices
2. The international co-production funds to support around 25 projects per year through four to seven funds, with a budget of €1.5 million for 2014. The objective is to support the development of co-production with, among others, the Eurimages countries.

### **3.3. Principal innovations to existing lines**

For training, the focus on management as well as development and challenges of the digital shift is confirmed, but emphasis is also placed on audience development, marketing and openness to professionals from non-member countries of the Media subprogramme.

Development: with a budget of €2.5 million of 20 for 2014, this line is expanded to the development of video games with two intervention levels in terms of the stage of development. Future beneficiaries will have to prove that they have already developed and sold at least one video game during the two previous years. In this line, the lengths of eligible works are revised in terms of genre (film, TV programmes and projects for digital platforms).

The key change for the development strand in this line concerns the requirement for applicants to apply online, with only one deadline per year. The points-based system also changes, with emphasis placed on distribution potential, editorial quality and experience.

Lastly, one of the most important changes concerns the fact that the points-based system puts a premium on countries with low production capacity or limited linguistic capacity.

For other lines such as TV programming, the changes consist of an adjustment of the guidelines to market realities and the place of independent producers. This line will primarily support high-quality projects for European and international markets.

Support for access to markets will rely from 2015 mainly on framework contracts and can finance projects outside Europe. There is a major change for the festival line, with a budget of €3.25 million for 2014, which will now also include film literacy projects and audience development during festivals.

Regarding management, several important changes should be underlined. The introduction of a lump sum is meant to simplify accounting and budgetary management. This approach is also adopted for the distribution line. The number of calls is limited to two per year and changes are made in monitoring (documentation on releases and box-office reporting). Online management also becomes mandatory in this line.

There are no noteworthy changes to the cinema networks line except for the development of new business models, reaching new audiences and interacting with digital platforms.

## 4. FIRST RESULTS OF THE CALLS

This chapter will present a quick overview of the selection results within each support scheme of the Creative Europe Media subprogramme (2014-2020) for the period 1 January 2014 –to 1 May 2016, by country and by scheme.<sup>5</sup>

This table (see Annex III) reveals a number of interesting findings.

The Big 5<sup>6</sup> are no longer the group with the highest number of applications approved. Belgium, Czech Republic, the Netherlands, Poland and Sweden now boast a number of selected projects equal to or greater than those of the big five. Indeed, France and Germany are still by far the two countries that are the largest beneficiaries for these first two years, but Italy, the UK and Spain have been surpassed by countries like Belgium, Sweden and the Netherlands.

A horizontal, i.e. by country, reading of the table of presentation of results for the 12 programme lines reveals that only 16 countries (or 50% of the 33 participating in Creative Europe) have projects selected in at least half the programme lines. Nearly one third of the countries (9) have projects selected in four or fewer programme lines.

Disregarding the specific nature of the cinema network project, France alone has projects selected in all the programme lines. Excluding this line, two countries, France and the Netherlands, have projects selected in the 11 programme lines<sup>8</sup>.

Looking at the results by column (i.e. by programme line), it is no surprise to see that almost all the countries have projects selected in two lines (distribution and development of single projects), two thirds of the countries have projects selected in development of slate funding, TV programming and festivals. Around one country in two is present in the access to markets, video games and training lines. Projects selected in international co-productions and support for on-line distribution lines concern less than one country in three.

On certain lines, such as TV programming, video games and online distribution, it should be noted that countries like France, Poland and Denmark monopolise the top positions with the number of projects selected. (See Annex III). At the times of the survey 1806 applications have been sent. This data will be an indicator of the success of the Creative Europe Media subprogramme at the end of the programme. Eight hundred and nine applications were selected (average success rate of 44.7%)

The table in Annex III summarizes the results available by country and by strands. The last two columns give the total number of applications and the number of selected applications per country. The data presented below are the overall success rates of different countries for different calls based on public EACEA information. They may change slightly when the results of all calls are known.

On the whole, the most successful countries are those that have developed various national supports for the audio-visual sector (from tax breaks to a wide range of subsidies).

In the third group (less successful), the big countries are those that have the lowest rates even if their public national support to the cinema and TV industry is among the highest (France, UK, Italy). These results are probably the effect of the automatic point system.

<sup>5</sup> Up to ca.1% data deviation is possible due to unsystematic availability of data from EACEA online sources (difference of 22 between the total number of selected projects per country (2583) and the total number of selected projects per scheme (2561)).

<sup>6</sup> France, Germany, Italy, Spain, UK.

<b>Top 5 &gt; 60%</b>	<b>Success rate</b>	<b>Intermediary</b>	<b>Success rate</b>	<b>&lt;50%</b>	<b>Success rate</b>
Greece	64,0	Austria	59,3	Romania	48,5
Luxemburg	63,8	Portugal	58,3	Finland	47,2
Norway	63,1	Croatia	58,2	Germany	44,5
Netherlands	60,9	Czech Rep.	57,1	Bosnia	41,7
Denmark	60,1	Belgium	56,1	Bulgaria	40,4
		Estonia	53,4	Latvia	38,3
		Slovenia	53,2	France	36,0
		Poland	52,1	Sweden	33,5
		Slovakia	51,2	Montenegro	33,3
				Albania	33,0
				Spain	29,6
				Cyprus	29,4
				UK	28,6
				Italy	26,2

Source: Media Consulting Group 2016 (based on Annex III)

## 5. ANALYSIS OF THE ANSWERS

As indicated in the chapter on methodology, this chapter presents summaries of the responses to each question. The sub-chapters (e.g. Management of changes) are the expression of the summary of the responses to the different aspects of implementation.

*Q1. What were/are the biggest challenges (for the Media Desk/overall?) in the transition from the old to the new programme, in particular with a view to integrating Media into the Creative Europe structure?*

- *How have they been tackled (by Media Desk/the Commission)?*
- *What support was offered by the Commission?*

### Management of change issues

For all respondents, the biggest challenges in the transition from the MEDIA programmes to Creative Europe was on the one hand to manage the transition between continuity and innovation for a complete change of perspectives and objectives supposed to bring real added value, and on the other hand to re-organise the two structures so as to comply with the Commission's new requirement of one contract per country.

Creative Europe is considered by all as a new programme in its objective and priorities, more flexible and evolving (with experimental calls) and enlarged to new types of beneficiaries and territories. It therefore demands more anticipation of the changes in order to encourage old and new beneficiaries to think in a more European, innovative, strategic and forward-looking perspective.

It is therefore necessary for the actions and support provided by the desks to evolve from a technical approach to a more global and innovative approach. This is especially important in countries that are long-time beneficiaries of the MEDIA programme.

While many CEDs are contributing fully to the task of building a single creative sector in Europe, they think that the goal is still quite a long way off. The two sub-programmes are very different in many respects.

As expressed by one of them: "We face the biggest problems in our communications where the very language used is different in each sub-programme: for example, the MEDIA sub-programme 'invests' in 'companies' whereas the Culture sub-programme 'supports' 'organizations'."

### Synergies challenge

For almost all of the respondents, the merger of the MEDIA and CULTURE programmes has not proved practicable mainly due to the very different clienteles and their needs. The Desks have explored common topics and set up a common entry website as well as a Creative Europe publication. They have organized joint events to initiate networking between the different industries. But experience so far has shown that the industries targeted by the CEDs have few common interests and converging points.

Target groups, timing of calls, etc. are completely different and so is the work the Desks are doing.

The two programmes have been working differently. The structure of funding calls is different (MEDIA has 14 calls per year, Culture has fewer). While some of the challenges seem to overlap, i.e. the constant struggle between value and economic output, the difficulties for young emerging talents to reach the market, the patterns and stakeholders differ.

"So we can learn from each other but we have to tackle the problems individually" is a conclusion shared by all.

## Organization issues

One of the biggest challenges in implementing the new programme is the creation of synergies between CULTURE and MEDIA. The clienteles of the programmes rarely overlap. This is not surprising, since the funding schemes remained the same. Two years later, cross-sectoral funding schemes were introduced and budgeted. All CEDs agree that with very little money, the impact will be poor.

Another challenge faced by some Desks is a misinterpretation of what a Head or Coordinating Body should be and how it should act. In the case of many small countries, there has been a lot of interference from the head of the local Creative Europe Desk considering that the managers of the Desks considered have little impact on the CED's action plan.

## Communication channels issues

The great majority of the CEDs complain that EACEA has become too anonymous. There is no chart in the new organisation and CED's representatives do not know who works where and who is doing what. In many answers, this is seen as a weakness and is not appreciated by CED representatives. "No one has provided a real reason for not sharing this crucial information with us."

Every question has to be e-mailed to the common address or NING<sup>7</sup>. All CEDs explain the need to receive more updated information and a Who's Who of the EACEA.

Another information shortfall has plagued Creative Europe from the beginning: the Desks no longer receive the complete lists of applications. Compared to Media 2007, this is considered a major mistake: "We used to have these lists and they were very helpful for our work with the applicants".

Lastly, a majority of CEDs regret that "earlier we always contacted the Agency/Commission directly. Now, on several different matters, we have to first contact our coordinator (another desk or the ministry) or someone in Brussels who is not working exclusively for the MEDIA programme. This makes communications sometimes more complicated as a lot of explaining is required".

- *How have they been tackled (by Media Desk/the Commission)?*

Different models of organisations (one common office, two separate, different kind of partners including ministries) were implemented for establishing CED, according to the local situations, partnerships. The overall relationship with EACEA is considered as good and cooperative by a large majority of respondents. But two difficulties are encountered by a majority: the absence of clarity (e.g. lack of information about all submitted projects including the explanations behind the success or failure of applications, poor information on incoming calls) and an overly complex and distant relationship (who's who in the agency and no organisation chart) with EACEA.

A significant number of respondents (10 of 43) complain about the weakness of the support received from EACEA. "We were told not to communicate with EACEA any more as our office was not a contractor". The obligation to go through the Desk having the contract with EACEA to receive answers apparently did not work very well. "Of course this was not possible and now it works more or less like before."

But 100% of the CED representatives are very satisfied with implementation of the NING communication tool. NING is considered very helpful.

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<sup>7</sup> NING is a digital tool for creation of social networks, commonly used within smaller communities and groups of interests.

The support from EACEA is considered good as far as Media and Culture are concerned but very weak and uncertain for the new financial instrument. "This still seems to be quite a vague concept."

The funding scheme for video games is mentioned in a dozen answers: "The target group, know-how, technology, production process, etc., are completely different from those of traditional MEDIA applicants. The lack of know-how on the part of the Commission and the Agency is visible in the application guidelines, e-forms and general idea of the scheme, which often do not correspond with the reality of the development of video games".

*What support was offered by the Commission?*

All applicants considered the information events on the new programme organised by the Commission and EACEA as very helpful.

The greatest challenge has been the arm's-length relationship with EACEA/the Commission. The Commission and EACEA offered little support during a time of great uncertainty during the restructuring, which meant the loss of many good, experienced personnel in Member States especially the small states, which was unfortunate.

Small countries are considered to be those that have suffered the most with the transition. For the great majority of these states, it is obvious that the transition from a MEDIA programme working autonomously for so many years to one placed under the Creative Europe umbrella was not easy.

Countries with several Desks encountered difficulties uniting all their offices with a coordinating body, a time-consuming process with different interests involved.

For instance, finding a coordinator was a challenge that took a lot of time. To find an institution that was legally and financially able to host and coordinate several offices with different legal status was also a major challenge. The link between film institutions and the Desks could not remain in all countries, leading to job losses.

The Commission and EACEA were very helpful in finding individual solutions for the coordinating body and in addressing the situation of several offices.

Also, there is a misinterpretation of what a Head or Coordinating Body should be and how it should act. Again, in the case of small countries, there is a lot of interference from the Head of the local Creative Europe Desk, which treats the Desk Managers as secretaries having little impact or say on the Action Plan.

## **Conclusions**

The merger of the MEDIA and CULTURE programme has not proved to be practicable mainly due to the very different clienteles and their needs.

At the programme's launch, the introduction of a new corporate identity and logos for the new programme led to a certain level of confusion in the industries.

There is a feeling that the integration was not studied in great depth and that differences between Culture and MEDIA were not taken into consideration.

In general, the relationship with EACEA is described as a constructive relationship between partners with the same goal: supporting the European film industry.

CEDs are aware that EACEA has to seek balance across Europe while a CED is mainly responsible for maximising the opportunities of the industry in its own country with regard to making it work on a European level.

The communication flow between EC/EACEA and the Desks could be improved.

All CEDs would appreciate having more opportunities for constructive discussion, to submit hot topics and issues to the EC/EACEA and to receive first-hand, up-to-date information from the EC/EACEA.

All CEDs consider that they could make a very useful contribution to the EC/EACEA towards achieving specific goals, i.e. making calls more effective, if they were more involved in the process of developing new funding schemes and other services.

*Q 2. What are the biggest remaining problems under the new programme?*

### **Coordination with EU**

A large majority of respondents (30) find that coordination between Media and Culture is a struggle in Brussels. Ten of the 43 even say that, based on their experience, it seems "that since Media was moved to DG CONNECT, there is no connection between the policy part of the Media programme versus the Agency".

Some (7) consider that CEDs are overloaded with work from both the Agency and the Commission without coordination, "as the fact sheets are demanded on very short notice from DG CONNECT and at the same time there are final reports and a lot of deadlines from the Agency".

For some CEDs, there is a need for clarification with respect to the Commission/EACEA. It needs to be made very clear who is responsible for what in each Member State.

A few respondents (5) state that, for DG CONNECT, the visibility of the programme is more important than the real content, the support system itself.

For certain Desks, the only way to reach the Commission is through the MEDIA Committee and the local authorities and then the EACEA.

### **Understanding of the new programme**

The biggest challenge is to have a clear understanding of the new programme among professionals, a clear visibility of its evolution and a more shared analysis of its current impacts.

According to a number of answers (25), "it has been difficult to present the cross-sectoral strand of Creative Europe in a convincing way, as the funding schemes on offer have been very limited".

They all consider that it has been a challenge to organise meaningful cross-sectoral events aimed at both the cultural and creative sectors and the audiovisual industry. "Mostly, such events can have only a general focus and therefore do not tend to attract relevant industry professionals."

Cross-over projects between film and culture are still not eligible in either of the schemes and the merger of the programmes did not really bring the industries closer together.

Certain fears also emerge in various answers about the guarantee facility supposed to replace i2i Audiovisual. As one of the respondents said: "We don't have to be Nostradamus to see that this instrument will mostly benefit the big countries." This view is shared by the CEDs from small countries and is a clear message for the Commission.

### **Media Sub-programme budget**

All CEDs agree that underfinancing of most of the funding schemes leads to a situation where many high quality projects get rejected not because of a higher level of quality of the selected projects (sometimes 0.5 point can be decisive) but simply because of a lack of funding. The newly implemented Financial Instrument will not reach all the countries – based on the reasoning of a "market driven tool", the EC/EACEA abandoned in advance the unique



opportunity to shape the creative industries of the EU as a whole– and may function only in countries where a similar instrument has already been in place, which doesn't make sense.

In addition, the reductions of the amounts per admission which constitute the automatic support will have a severe effect.

### **Level playing field. Large and small countries, and guidelines**

Several answers are underlying the lack of balance in the selection process caused by the automatic points and other mechanisms supporting small and medium-sized countries.

The biggest problem of the new programme is the heavy penalisation of the big five countries with high audio-visual production capacity, which are not eligible for the automatic award of 10 points for countries with low capacity and 5 points for medium capacity<sup>8</sup>. This scoring system is gradually cutting out the five big countries from calls for proposals for the development of single and slate projects. The TV programming strand also uses an automatic system (5 extra points) for applicants from low-capacity countries. For this support, there is no difference between low- and medium-capacity countries.

In this regard, there is also a lack of clarity by the Commission and EACEA who do not clearly explain the programme's actual orientation, leaving the Desks without the necessary information to properly promote calls in specific areas (cross-over projects, development and distribution funding schemes, guarantee facility) thus creating false expectations among stakeholders.

It seems that equal access to different calls for proposals has been lost along the way, and it is important to keep this, particularly when it comes to the single project development scheme.

Due to the introduction of lump sums, the Selective Distribution scheme now supports fewer films than before. As a result, sales agents notice a growing tendency amongst distributors to concentrate on a few strong films rather than taking risks on smaller titles.

Distributors also state that the situation is even more difficult as there are now only two submission deadlines (as opposed to three under MEDIA 2007). As a result, a substantial number of strong films are rejected.

Many smaller distributors no longer have access to Automatic Support in the new programme because the minimum thresholds were raised, and it is no longer possible to combine the funds of two consecutive years.

For a large majority, but for opposite reasons, the main challenge is the introduction of automatic points meant to ensure a level playing field between large and small countries. Large and small countries do not have the same view of the level playing field. For small countries, the automatic system and criteria for countries with low production capacity is a good policy which must be strengthened. For large countries, this level playing field excludes many beneficiaries from support like single project development.

A number of administrative and technical issues were raised by respondents

More than 70% of them raise a number of issues related to the application system.

- Extremely long time between the date of application and results.
- Need for more information about selected/rejected projects, although respondents clearly understand that the rejected companies would like to remain anonymous.

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<sup>8</sup> This new category was established in 2015: Austria, Belgium, Denmark, Finland, Ireland, Norway, The Netherlands, Poland, Sweden, Switzerland

- Not enough information on selected and non-selected projects – longer expert’s statements needed for learning purposes and to explain things to applicants/potential applicants.
- Not enough information from the experts.

### Technical issues

The portal for beneficiaries has technical problems. CEDs claim: “This has created a tremendous amount of extra work for us and annoyance for the industry”. For a number of CEDs, applicants had difficulties switching to the electronic application process and registering their organisations in the ECAS system, which had undergone changes. A majority of CEDs call for a more user-friendly Participant Portal and the use of more efficient procedures. The biggest problems concern the portal.

### Positive points

Almost all of the answers are in favour of the NING platform, which appears to be the strongest tool of the new organisation.

The second positive point is the switch to online applications, despite the need for certain improvements, as developed in the answers to Q5, Q6.

The NING platform has improved communication between the desks and EACEA, as well as among the Desks from different countries. As said by many respondents, “this tool is remarkably helpful and has considerably improved our work owing to easier and faster flow of information available to all Desk representatives”.

#### Is EC/EACEA generally responsive to your suggestions for improvement?

There is a positive answer to this question. All CEDs consider that EACEA is very responsive to their demands and suggestions even though this sometimes takes time and answers sometimes change from one e-mail received from EACEA to the next.

But several CEDs do not hesitate to check with their peers from other CEDs when they have doubts about an answer, since they do not have an organisation chart of the EACEA enabling them to reach the EACEA’s relevant contact.

One third of the CEDs regret that the EC/EACEA have been very responsive only on non-policy issues such as deadlines.

### Conclusions

One of the main issues with the MEDIA Sub-programme is the fact that it has to manage the challenges created by its own success. On the one hand, professionals and the EU are celebrating the 25th anniversary of a very successful programme, and on the other, one of the main challenges is to make sure that the introduction of the automatic points system (see Level playing field section, page 17), put in place to ensure a level playing field between large, medium and small countries, will not lead to negative and imbalanced results. The table of results (see Annex III)<sup>9</sup> gives an overview of the successful and unsuccessful countries. The big five have the lowest rates of success (ranking from 26.2% for Italy up to 44.6 % for Germany. The top five of the most successful countries are Denmark (60.8%), Netherlands (60.9%) Norway (63.1%), Luxemburg (63.88%) and Greece (64.0%).

The second issue is the budget. The EU and EACEA are trying hard to promote the programme and the number of applicants is a good criterion of success. But numbers of countries and numbers of applicants have a direct impact on the level of financial support received per

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<sup>9</sup> Results of several calls were not available and the table does not represent 100% of the results.

beneficiary and an even more difficult selection process, leading some professionals choosing not to apply.

*Q 3. In relation to collaboration with the Commission, what kind of support/information do you still miss most?*

### **Communication channels to be improved**

“We need to be seen as part of a communication machine. Everyone in Brussels must always ask themselves 'have we told the Desks?' and we need to be told earlier than others so we are perceived as genuine insiders.”

This quote sums up the feelings of a large majority of CED answers. On the one hand, they all confirm that they have better access to different kinds of information regarding policy priorities (including digital single market) and programme implementation (quantitative and qualitative analysis of calls, etc.).

It is very important for information of this type to be developed because it is useful to CEDs' analysis, decision-making and support to professionals. 70% of respondents ask for even more information with background analysis of proposed changes in the different calls for proposals and the impact of the previous experiences financed since 2014 (e.g.: the online distribution scheme).

But on the other hand, all ex-Media Desk representatives still have in mind that under the previous MEDIA Programme, the national representatives were sent lists of all applications (selected, rejected and ineligible) for all schemes, complete with summaries of the expert evaluations. “These lists were our main source of information regarding the standard required for successful applications in a given scheme, and they also provided information regarding the most common errors and omissions.”

Today, many have the uncomfortable feeling of being “the last to know things”. As they consider themselves key resources for successful applications from their countries, they are doing their best to collect relevant information. They regret that “sometimes CEDs become aware of changes only because a colleague mentions a doubt on the Ning internal social network and the Agency answers by unveiling new conditions that otherwise no one would have understood.”

One third of the CEDs find that “having a list of the most relevant training opportunities for the betterment and advancement of the CED’s team members” would be highly beneficial, especially when considering the very varied funding schemes and the sectors catered to within the programme.

As a key component in terms of networking and information exchange, CEDs need efficient communication on some of the Commission's initiatives (e.g. European Film Forum initiative, with related information coming quite late, as well as MEDIA 25th anniversary initiative).

They regret that NING's potential is not tapped into sufficiently. A more digital attitude is still lacking in the activities, for example streaming discussions online, making them available online afterwards, etc. EACEA must improve knowledge-sharing among the Desks.

### **Media Policy**

There is also a need for discussion of new ideas on politics and how the programme will change in the future (e.g. automatic points system, pre-sales for TV distribution). On a short-term basis, information on the financial instrument (Finance guarantee fund) needs to be improved as it is considered too scarce and possibly harmful to balance between countries (see Q1). Some believe “that it will not be for all countries”.

CEDs still do not know exactly what their role will be and what will happen when, according to many of them (25), “some calls, like the one regarding refugees, are clearly promoted even knowing that this creates false expectations”.

### **Creative Europe working process**

One third of the CEDs regret not being involved in the expert selection process, apart from advertising for applications for expert selection. More transparency in the selection of experts is considered crucial with respect to the level of competition among countries.

A strong majority of CEDs (75%) consider that there is:

- A lack of clarity in the drafting of guidelines (e.g. online distribution, video games). This is one of the major problems raised by a number of CEDs. Certain aspects of the calls for proposals are often not clear or sometimes changes from the past are not communicated in an appropriate way.
- A lack of information on applications from other European countries, which would be very useful as most of them entail international cooperation and might also involve companies from others regions.
- Due to the lack of such lists, CED managers urgently ask for detailed info sessions at CED meetings, “where the EACEA team will provide them with a detailed survey of successful and unsuccessful applications for each scheme, pointing out the dos and don’ts so they can “be the best ambassadors of the programme in each country”.

Another two issues raised by almost all of the respondents are:

- The need for an organisation chart of the EC/EACEA, showing internal structures of responsibilities and competences, contacts and communication channels.
- The need for timely information on new plans, goals and initiatives of the EC/EACEA.

Some CEDs (5) have requested anonymous sharing of the feedback sent to the applicants who were not selected. Even an overview of the rejected project’s expert comments would be very helpful.

A specific request is raised by newcomers in Creative Europe, namely for a handbook for those “who lack the experience and knowledge many of their older peers have built up over many years”.

### **Main conclusions**

The answers to question number 3 are consistent. A very large majority of the CEDs seek an improvement of communication with EACEA and the Commission. This concerns not only quantity but also the quality of information. The requests could be summed up as follows:

- An organisation chart (a sort of who’s who) of who is doing what in the EACEA
- More detailed information on selected and rejected projects
- Information on the reasons for selection or rejection
- Information from EACEA including the expert’s evaluation
- More information on the new schemes, e.g. video games, audience development, etc.

Q 4 *What works well (better) under the new programme (in comparison to Media 2007)?*

- *What are the biggest advantages of the new Media programmes (for beneficiaries? For Media Desks?)*

Two aspects are mentioned by a majority of respondents, at the policy level (relevance of the programme) and administrative (or technical) level as a result of the change in the application process.

According to a majority of answers, the biggest advantage of the new programme is that it is in phase with the challenges facing the European sector and its needs in this era of globalisation and digitisation. It is indeed directly connected to the European Commission's analysis of how to reinforce the European audiovisual industry.

The fact that the programme is more focused on audiences and on support for film education is considered by a majority of CEDs as very positive.

But these two overall positive answers must be analysed in more detail to have better insight into the differences between countries.

### **For beneficiaries**

A majority of respondents agree that the e-application (with e-form) is a very positive change and works well. For almost all, this is the biggest advantage of online application for beneficiaries.

Some changes in the guidelines are considered very positive for beneficiaries. CEDs from small countries are approving the changes. For a great majority of respondents, the change to the lump sum system is positive and works well for single project, festivals and selective scheme distributors. It probably works too well because the downside is that some schemes are actually too popular and the competition makes it very difficult to submit a successful application.

The lump sums introduced in various schemes, which contribute to their simplification, are generally applauded and considered an added value in relation to the previous programme.

But for the Selective Distribution selection, the reactions of the industry are more mixed and there is strong disagreement in large countries. On the one hand, distributors appreciate not needing to pay an auditor any longer, but on the other, they criticise the fact that the scheme no longer acts as an incentive for distributors to invest in promotion, as the only criterion now is the number of screens.

Compared to Media 2007-2013, the successful schemes of the previous programme are still the same, i.e. Development and Distribution.

Regarding the new Creative Europe schemes five successful aspects are underlined by a majority of respondents:

The new MEDIA schemes allow the programme to reach areas that were not covered by the previous one, i.e. Film Education/Film Literacy and Co-Production Funds. The inclusion of support for video game development is a valuable addition to the programme, even though the support is not yet high enough to really make a difference, observe numerous CEDs from large and small countries alike.

Online Distribution. This is a major advantage to experiment with new business models based on innovative digital distribution measures, even though only very few stakeholders have received large amounts of financial support.

Video Games. This scheme provides good support to the games industry which welcomes it, especially in certain countries with limited national public support. In some of these countries, SMEs have benefited from this funding opportunity. The focus on narrative games has nevertheless been questioned by games professionals.

Audience Development is also an advantage, even if some countries were not able to apply for support under this scheme due to a lack of awareness or the lack of stakeholders able to apply.

### **Small/large countries**

The biggest challenge is how to make new schemes (online distribution or similar) accessible to beneficiaries from small countries.

According to several respondents, if certain calls are less popular than others among beneficiaries from small countries, "it is not because the beneficiaries from those small countries are lazy but it is because they just cannot apply as they cannot meet the criteria".

For a few CEDs, there are no advantages at all with the new programme. All schemes have become more unaffordable and "the level playing field is a great disadvantage".

### **Advantages for CEDs**

Several changes are welcomed by almost all the CEDs.

- NING, because "Brussels" usually answers quickly, and everyone benefits from the questions and answers.
- The European Film Forum conferences are a big step forward and bring together key figures from different branches of the industry.
- Informal meetings between Desks and individual staff of EACE/the EC at festivals (Cannes, etc.) are much appreciated!
- Regular meetings of ALL Desks are much appreciated - the only way to establish cooperation across borders and between different industries, important exchange of knowledge and experiences, learning from each other.
- With a common graphic identity, 75% of the CEDs feel "much more part of one big family" even if the changes after years of the Media Programme were not so easy to promote.
- Other advantages are mentioned by various CEDs, such as an annual budget every year or a simplified reporting system (e.g. for development).

### **Conclusions**

In their response to this question, several CEDs underlined all the benefits of the new programme. But at the same time they also pointed out the dramatic changes in several countries, where MEDIA Desks were closed or MEDIA and many people lost their jobs or "Desk colleagues subsumed under structures which are far removed from the audio-visual sector".

CEDs expect more communication efforts from EACEA in order to facilitate access to some schemes by drafting Frequently Asked Questions.

Over the medium term, the level playing field could become an issue for Creative Europe between those who consider that this is not enough for their sectors and must be strengthened and those who think that it is too great a disadvantage for them, because a small number of medium countries obtain stronger benefits than any others (see table of results Annex III).

Q 5 *Which new schemes have so far been the most and the least beneficial for your respective market?*

- *Why?*
- *Which administrative demands (requirements) do beneficiaries (and applicants?) struggle with most?*
- *How would you evaluate the overall structure of the Media sub-programme? (well structured, too-structured, other? - Please comment.)*

This study is not an interim assessment of the results of Creative Europe. This question aims to shed light on the way in which the different countries have benefited or not from the programme's lines of support.

The results presented in Chapter 4 (Annex III) clearly show considerable differences between countries on the results of the 14 lines of support.

While no line of support is reserved for certain categories of participants, there is no escaping the fact that beneficiaries from certain countries fare better than others in a specific line of support. The explanations that can be suggested initially are not surprising: either the beneficiaries enjoy specific criteria (e.g. level playing field - development, TV programming, selective distribution criteria) or they are the expression of market structure (online distribution, sales agents for France, UK, and Germany).

It can even be observed that certain beneficiaries are successful in specific lines and have managed to lay the foundations for the international development of a sector (video games in Poland) or that others, such as NGOs, have successfully tapped into new media literacy opportunities in France) or have significantly boosted their presence in lines from which they were absent in previous programmes (TV distribution in the UK). There are even countries that show real successes in a given line without having any direct beneficiaries (audience development in Portugal, training in the UK).

The following synthesis of responses to the questionnaire gives better insight into the diversity of the results and the questions that arise.

### **Most successful**

The respondents' answers present very clear explanations of the results of the first calls launched since the programme's inception.

For a small country, the development, festivals and distribution support schemes (automatic and selective) and game support work well. TV programming works as well as can be expected, considering that the TV sector is structured in such a way that it will always be the large countries that gain the most, with some exceptions.

For large countries, online distribution, sales agents, co-production fund and training are the most successful schemes.

Medium capacity countries (Denmark, The Netherlands, Belgium, Norway, Austria, and Luxembourg) which have developed a set of various national supports<sup>10</sup> for the audio-visual sector are successful in almost all strands

### **Least successful**

The new schemes: audience development, online distribution and co-production funds. There are no actors able to apply in small countries where small actors do not dare to apply

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<sup>10</sup> e.g. tax breaks, support for production funding, development and training support, audio-visual laws with provisions.

(audience development). Some CEDs worked hard to support their local stakeholders with audience development, but no applications were possible.

The market access and co-production fund are also unsuccessful for stakeholders from small countries. As said many times: "We do not have any such activities that would enable us to apply, unfortunately".

Surprisingly, there are doubts and a lot of scepticism about the real usefulness of the Guarantee Instrument. "In the long run it will be a lot of money blocked for a few guarantees mostly for applicants from large countries."

### **Difficulties with criteria and guidelines**

Applicants struggle with the high volume of guidelines and guides they have to consider.

One answer is common to a large majority of respondents. "For Application Procedures, five guides have to be consulted (complementary and sometimes with contradicting information as well as misleading terminology): Application guidelines, How to apply, Technical User Guide, Operational User Guide, FAQs. This is far too many" and the recommendation is crystal clear. "There should be ONE guide".

For many respondents, applicants struggle most with the eligibility criteria of specific schemes, for example, Sales Agents (track record too strict to be eligible to apply for European sales agents calls), TV Programming (maximum license period to the broadcasters capped at 7 [pre-sales] or 10 years [co-production], threshold of at least 50% of financing guaranteed by third party, Development Slate Funding (recent success of applicant company).

### **Difficulties with administrative procedures**

Not surprisingly, for a large majority of respondents, "applicants still struggle with how time-consuming the forms are and beneficiaries struggle with reporting. ECAS registration can prove challenging." Another issue involves having to use two different platforms for company registration and generation of e-forms.

For several respondents, "the names of the documents are not always clear and it's hard to find the relevant information. It would help to have only one well-structured guide with all information included."

The application e-form is very extensive and contains in most cases two questions on the same topic. Applicants therefore tend to repeat themselves often. For others, beneficiaries struggle with the new audit rules and, together with private auditors, they have problems understanding the rules and the document on factual findings.

Many answers reveal irritation with the general and imprecise automatically generated e-mail responses to applicants, the very slow updates of official information in the Participant Portal and slow or no responses from the helpdesk.

Final reporting should be easier for beneficiaries especially in the field of Audience Development, festivals, markets, and online distribution schemes. It is difficult for applicants to distinguish where to apply.

*How would you evaluate the overall structure of the Media sub-programme? (well structured, too-structured, other? - Please comment.)*

Almost all respondents agree that Creative Europe-Media is well structured because it covers most of the important parts of the film industry. There is strong relevance as its funding sectors cover all stages of the audio-visual industry.

Few respondents (3) state that the programme is too structured and does not leave enough room for innovation and cross-sectoral projects.



One respondent sums up the general feeling that “the programme works well, it is well accepted by the film and audio-visual sectors, it is well organized and that is also why it is so successful”. Moreover, for many respondents, its success is the source of one of the biggest issues. There are so many countries and so many applicants for an overall budget (818 million euros for 41 countries) that is insufficient to cover the demand from so many participating countries<sup>11</sup>. Many quality projects and high profile activities fail to obtain support because the funds available for each scheme are not sufficient.

## Conclusions

For all respondents there is no doubt that the programme works quite well and is very useful for the industry. That being said all respondents wish to see more simplification and more user-friendly procedures.

However, regarding guidelines and the automatic points system, all CEDs from small countries are dissatisfied with a certain form of imbalance between large and medium-sized countries.

The three-layered structure has not yet been applied to all calls. The low/high (two layers) production capacity principle is still applicable to most support schemes. This means that applicants from countries that actually have intermediate production capacity, very good access to other sources of financing and good market potential are given automatic points of a low production capacity territory and thus a rather unfair competitive advantage as opposed to both the genuine low production capacity countries and high production capacity countries.

Due to the lack of sources of financing, language usage limitations and small markets, beneficiaries from low audio-visual capacity countries can apply only to certain schemes.

*Q 6. How would you evaluate the new application process (online in comparison to paper applications, new application forms, etc.)?*

- *What are the major issues the applicants face when delivering applications?*
- *How efficient are the help desks in solving these issues?*

As already stated in some answers to question 5, the new online forms seem to be satisfactory to the majority of CEDs and people seem to be satisfied especially with the help applicants can receive from the help desk.

Nevertheless, some CEDs commented that “registering in the portal can be a bit tricky”. For almost all of the respondents, online applications are considered much better in comparison with the paper applications of the earlier programmes. They are more efficient and more environmentally friendly. It also makes more sense to request certain material only once an applicant is selected.

However, the forms are still too detailed and busy producers complain about the time needed to complete them.

Respondent’s answers are also split between those who think that the forms are time-consuming and those who do not.

One CED humorously observed: “It is extraordinary that the online submission seems to have had very little effect on the length of the application process and on the selection process. Waiting for results still takes too long.”

The online application process is considered a very positive development by almost all respondents and is said to represent the general trend for most national and regional funds.

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<sup>11</sup> Media 2007- 2013 had an overall budget of 717 M€ for 31 participating countries.

At the same time, the procedure for the Creative Europe MEDIA online application is complex and generates a constantly high amount of questions to the CEDs by the applicants.

### **Major issues faced by applicants**

The major issues mentioned by almost all respondents in their answers are the following:

- “Company registration and e-form generation: first-time applicants in particular are confused by the many steps necessary to register a company and generate an e-form”.
- The applicants often need the CED’s advice regarding the LEAR nomination procedure and changes to company data in the Participant Portal.
- “Applicants using iOS devices are often not able to generate and fill out the e-forms unless they change their device settings, causing many technical issues”.
- “Since not all information during the first company registration in the Participant Portal is compulsory (like the year of the company’s registration), many e-forms end up having blank fields and need to be revised, which is a support-intensive process”.
- “All this PIC and LEAR business can be quite confusing, especially for first-timers”.
- “Lack of clarity of the e-forms and their annexes: for many questions within the e-forms the applicants ask for an additional explanation of what is meant by the question. In the development schemes the proof required for the reference project is not clear and it is also not obvious that the applicants will be requested to provide such proof at a later stage only.”
- “For annexes which are not prepared as templates it is not clear which elements and information are compulsory and which can be added as an option.”
- “Amount of documents in the application process: especially for the development schemes the information necessary to register the company, generate and fill out the e-form, prepare the annexes and submit the application are spread between too many documents: guidelines, FAQs document, guide for applicants, how to apply document, e-form user guide and list of MEDIA member countries. The application e-forms are to be generated separately. They are accompanied by a number of compulsory attachments which are usually templates not connected directly to the e-form and have to be located separately.”

To help simplify this administrative process, some CEDs have prepared a short version of all important submission-related issues and links, which they provide to applicants.

CEDs appreciate that EACEA has managed to implement some very pragmatic solutions to many problems related to the online submission process and give CEDs the possibility to instantly help applicants to solve many issues. Only a few rare technical problems require the applicant to contact the help desks.

### **How efficient are the help desks in solving these issues?**

For many CEDs, it is now easier and quicker to reach the EACEA help desk thanks to the telephone number provided. However, it is not always easy to find help regarding the Participant Portal.

A large majority of respondents state that the Help desk always provides answers quickly, efficiently, and there are no specific comments about it.

## Conclusions

The CEDs' answers are consistent on the different issues faced by them and by applicants.

The online application is the best thing but there are many details/technical problems that have to be solved by EACEA and the application process should be more user-friendly. A number of participants also state that the Participant Portal needs to be made more efficient.

*Q 7 Which groups (category, i.e. producers, distributors, etc.) of applicants have the greatest problems (report the greatest number of issues)? Please mention the most important issues they face.*

### Groups of applicants encountering the most issues

Generally, applicants tend to be rather satisfied with the application process.

However, most respondents state that producers are those facing the greatest number of issues (producers are also the ones who submit the highest number of applications). Issues faced are related to e.g., funding schemes demanding more creativity and writing skills, fulfilling the eligibility criteria, downloading the right e-form and filling it in (first-time applicants), etc. In addition "one of the main complaints is related to the quality of experts. We have some complaints about second and third resubmissions for the same project and being awarded lower points".

Other issues listed and the groups encountering them:

"We have heard from many video games producers that the budget and the e-form are not adapted to the specific nature of the action, instead they are just copies of the budget and application form used for applying for support for film development."

Lengthy evaluation is often mentioned as a major issue in particular for applicants for Sales Agents and Film Festivals support. Festivals have fixed dates and decisions have to be made. As for Sales Agents, film release dates cannot depend on the publication of results.

For festival organizers, when it comes to the Film festival support scheme, it is getting rather difficult "for the new entries to be supported. In other words, the European Commission seems to confirm mainly the festivals already supported in the past more than to be open to new initiatives, even if well structured".

The lump sum principle does not seem to always be beneficial. In a Selective Distribution scheme the lump sums are said to be too high, regardless of the size of distributors' investment (e.g. dubbing is significantly more expensive than subtitling). This results in funds being absorbed by very few films, instead of funding more films with smaller amounts. In addition, smaller distributors have great difficulty accessing Automatic Distribution support in the new programme because the minimum thresholds were raised, and it is no longer possible to combine the funds of two consecutive years in order to reach the threshold. Concerning lump sums, some distributors "face the problem that the amount awarded often does not correspond to the maximum number of screens covered at the widest point of release, as the call states".

### Proportion of satisfied and dissatisfied applicants

As reported by many respondents, "Satisfaction is directly related to selection. This means there is currently a greater number of dissatisfied applicants as opposed to satisfied ones". Regarding the application process, CEDs find "that there is a proportion of 60% satisfied and 40% dissatisfied, in the latter case because often they find it complicated and unclear".

Regarding the outcomes of the selection processes, CEDs consider "that there is a proportion of 10% satisfied and 90% dissatisfied and very disappointed with the selection procedure in

terms of assessment and transparency and also with the brief comment they get from the Agency about the evaluation of their project.”

### **Relationship between the applicants/beneficiaries and CEDs**

Generally, most respondents describe having a friendly, cooperative relationship with applicants often based on long-term collaboration and partnerships. E.g.:

“It is a cooperative relationship. Not all applicants turn to the Desk when they first apply, but when they are rejected, they do... In addition, it seems that those who do ask for assistance by the Desk have higher chances of being funded and experience less frustration with the application process. It would be helpful if the Desks would get the information on who applied, and why they were selected or not. In a timely manner!”

### **Assisting stakeholders on researching financing possibilities within other Creative Europe programmes, on developing partnership, etc.**

CEDs do try to assist in this matter where possible, e.g. linking producers who applied to/benefitted from the Single project development scheme to the TV Programming scheme. They also steer applicants seeking financial partners to markets, co-production funds and festivals supported by Creative Europe and refer stakeholders to training programmes supported by Creative Europe as a way of developing partnerships with like-minded professionals.

Some CEDs (more likely from bigger countries) cooperate closely with other institutions promoting the cultural and creative sectors and jointly organise information events to discuss topics that are relevant for both the cultural, creative, and audio-visual sectors (such as crowd funding, social media marketing, audience building).

In addition, there is communication between Media and Culture Desks in regard to readdressing the projects that are more relevant to one or the other field.

In smaller countries, where CEDs have closer relationships with the industry and know its needs, some CEDs undertake partner searches for projects at big markets like Cannes, Berlinale, etc.

### **Conclusions**

Generally, applicants tend to be rather satisfied with the application process. CEDs are playing an important role in facilitating the application process and helping out with any issues faced by applicants, however the EACEA needs to be better tuned in to their input to bring in the necessary improvements.

Most of the dissatisfaction among applicants is a result of general problems with the entire Media funding structure: requirements for applicants, funding sums, transparency of the results, etc., and is not related to the application process itself.

*Q 8 In several fields, it is now institutions (/companies?) rather than individual applicants applying for funding. What are the experiences with the transition?*

The question 8 was not relevant for this survey. In all former MEDIA programme, natural persons/individuals could never submit applications. One-person-companies are still eligible but have little chances of getting funded. That is still the case with the Creative Europe Media Sub-programme.

*Q 9 Which trends do you observe in the projects (in terms of the quality/number per scheme, etc.)?*

*Does the new programme reach new audiences (industry/market/both?) in comparison to the old one?*

*Are there any perceptible changes in the structure of the applicants/beneficiaries?*

*What is the balance between different categories of applicants/beneficiaries and sectors?*

*How would you evaluate the quality of the selected projects? Any memorable international success stories?*

*Are Media Desks involved in the selection of the experts conducting the evaluations?*

## **Trends**

The Single Project Development scheme has become extremely competitive. Due to a very high rate of rejected applications in certain countries (mostly big five with average rates from 56% - Germany - up to 60 to 74%- Italy, UK, Spain), a climate of mistrust appears among producers “that could cause a progressive abandonment by potential applicants”. A large number of strong applicants are deterred by the high rejection rate and decide not to apply, thus Creative Europe is losing some really good projects.

For the Festival Support scheme, there is a clear tendency of supporting existing festivals rather than encouraging new initiatives from which the market would benefit.

Projects are now presented with a much higher level of quality and preparation and tend to be more market oriented and less local. CEDs agree that “they are definitely seeing more applicants working with international co-production partners and seeking international sales, which is really positive.”

Some comments suggest that there is a new trend resulting from implementation of the new guidelines. “Compared to the former MEDIA programme, we see a decreasing number of applications under the automatic distribution scheme. The funding thresholds are impossibly high for several distributors who regularly benefited from the automatic funding in the old programme.”

Some countries notice a growing number of applicants from the regions as opposed to the urban centres.

The distribution of many non-national European films in many countries is supported by the MEDIA programme, thus functioning as an efficient tool to enhance the visibility of such films.

## **New Audiences**

According to many respondents, new funding schemes (Support to Video Games, Online distribution and Audience development) do attract new audiences but these answers were not well documented.

## **Changes in the structure of applicants/beneficiaries**

In smaller countries there does not seem to be any change.

In some larger countries, a transition from big production companies to smaller structures may be observed. As one respondent specified “The companies are resizing into small and fragmented productions units that get together for every single project, very far from being oriented to a real Slate Funding structure.”

## **Balance between different categories of applicants/beneficiaries and sectors**

The proportion of applications among the different funding schemes is lopsided. Single project development, distribution and film festivals typically receive significantly more applications than other support schemes.

## Quality of selected projects & international success stories

Most CEDs report the quality of the selected projects as being very high.

Some quotes:

"Projects that benefit from Development funding seem to make good progress and I am hearing that the MEDIA label remains a useful label for markets and festivals."

"Moving Cinema in Audience development (with spectacular results), Filming in Void has been a huge success, A Contracorriente as distributor, producer and exhibitor is brilliant and Polar Star Film is a great company producing documentaries at international level."

"'Ida', directed by Pawel Pawlikowski (application submitted by the Danish producer), The Witcher video game (CD Projekt), 'United States of Love', directed by Tomasz Wasilewski, Scope50 and Scope100 (application submitted by a French organisation, but it was the Polish partner who came up with the idea)."

"'Hinterland', produced by Fiction Factory. They are not only the recipients of Single Project and two TV Programming grants for this series, but their success has also galvanised much of the Welsh drama production community into developing TV drama with scope for the international market. This has resulted in another UK-based drama production company (developing a Welsh drama) to apply for Series Mania with a view to seeking international partners."

Of course, it is important to mention that 23 Media-backed films won awards in 11 official and parallel competitions at the 2016 Cannes Films festival<sup>12</sup>. The prestigious Palme d'Or was awarded to "I, Daniel Blake" directed by Ken Loach, which obtained support from the development and distribution schemes, but also the Best Director Award (Prix de la mise en scène) was jointly presented to former Palme d'Or winner Cristian Mungiu for "Bacalaureat" and to Olivier Assayas for "Personal Shopper".

Besides the official selection of the main competition, two films supported by MEDIA received accolades at the Cannes Festival's "Un Certain Regard" section: the Best Screenplay award went to Delphine and Muriel Coulin's "Voir du Pays", while Michael Dudok de Wit's "The Red Turtle" received the section's Special Prize."<sup>13</sup>

However, all respondents consistently stated that Media Desks are not involved in the process of selecting the experts or applications.

## Conclusions

The overall tendency of increasing competitiveness of applications in all funding schemes, in particular in Single Project Development, is quite visible. This raises the quality of the projects, however, due to the very high rejection rate, also deters many applicants with potentially strong projects from applying.

The majority of respondents emphasised that a joint Creative Europe programme has not yet reached new audiences and that only certain newly introduced funding schemes such as Video Game Development and Audience Development succeeded in attracting new beneficiaries.

*Q 10. Which suggestions do you have for improvement of:*

- *application process/forms, etc.?*
- *co-working with the Commission?*

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<sup>12</sup> <https://ec.europa.eu/digital-single-market/en/news>

<sup>13</sup> <https://ec.europa.eu/digital-single-market/en/news>.

- *other?*

CEDs have a lot of suggestions for EACEA and DG CONNECT with a view to making Creative Europe more efficient. For the most part, their suggestions and recommendations are already quoted and explained in the various chapters above, but it is important to propose a sort of tool box for EACEA and DG with all suggestions and ideas coming from CEDs' answers.

While the suggestions regarding the application process and co-working with the DG and the agency are consensual, there are strong differences regarding changes in the guidelines.

### **Application Process**

Proposals:

- Reduce the number of documents involved.
- Provide the complete project statistics and evaluation reports which will help CEDs in their daily job with local stakeholders.
- FAQs, pedagogical material and demonstration films are welcome.
- Make sure that terminology is clear and comprehensible.
- Define clearly which documents should be submitted by an applicant in the given support scheme and where those documents should be uploaded (Participant Portal/e-form).
- Enable the attachment of several documents as a single annex to the e-form and draw up one document identifying all the required documents that should be uploaded to the Participant Portal.

### **Relations between CEDs and EACEA and or DG**

Proposal: "Talk to us!" This is the baseline, the appeal to which the Commission and EACEA must respond. It is also the first condition for working productively and efficiently with the DG and the Agency. For CED managers, this entails four messages:

DG CONNECT must respect the practical work done in the Agency and in the CEDs "and not force only the policy and visibility aspects without taking the grass roots job with applications and such, which takes most of our time".

CEDs need a clearer definition of when to engage with DG CONNECT and DG EAC.

The Desks are the faces of the programme in the film field. CEDs must be informed of news and changes as soon as possible and things will go smoothly.

In this field, working with the Commission requires appropriate and timely communication with CEDs, particularly when it comes to the introduction of new calls for proposals, and not just to announce them without any prior notice.

Beyond these needs, meetings are the second condition for working together efficiently.

Regarding the policy meetings, CEDs' answers are quite basic:

- They need to receive information on the Commission's events (like the European Film Forum) well in advance. This information must include at least some of the speakers' names to enable promotion of the event.
- They need regular online meetings: two meetings a year are a minimum and not only in Brussels but in different places. Of course, CED meetings should not overlap with deadlines.

Lastly, regarding the quality of information, there are three consensual demands:

- CEDs need an organisation chart of EACEA with clearer identification of roles and protocols in the services. This document must be permanently updated, particularly when changes in personnel occur.
- CEDs need to receive the communication of the results and analysis of the calls. This includes a list of beneficiaries and rejected projects per country and scheme, as well as some information on the evaluations, which used to be provided.
- CEDs need improvements to NING: archiving of old and unhelpful posts, retrieval of key information on schemes and their compilation into a single searchable document.

### **Guidelines and support schemes**

There is a request to reduce or cancel the automatic points in order to make project quality the deciding factor vs. strengthening the level playing field in order to reduce imbalance between small and large countries.

There is a consensual way to address this issue, however, namely to increase the overall budget of the Media Sub-programme.

If possible, the duration of the evaluation process should be significantly reduced; it should take no longer than three months.

CEDs also urgently need better information on the financial instrument and on new cross sectoral initiatives.

### **Conclusions**

Not surprisingly, the conclusions that can be drawn from the analysis of responses to the question 10 concern firstly the simplification of the administrative work and what is logically correlated, the desire to accelerate proceedings.

The demand for better information is general (organization, results, on line meetings, new financial instrument)

Finally, the remarks on a better budget and a better consideration of the differences between countries are generally shared by respondents.



## 6. RECOMMENDATIONS

Several recommendations can be made as a result of this analysis. These can be placed into three groups.

### THE CEDS/EACEA/DGS RELATIONSHIP

- Put tools and documentation produced by various CEDs online as models of good practices to be followed.
- Communication has improved but can be even better and will give CEDs the feeling that they are a true part of the system. “Talk to them” is the baseline.
- CEDs play an important role in applicants’ success. Give them better access to more detailed information on the evaluation of unsuccessful applications.
- Increase the transparency of evaluations, one of the most important issues, and publish the results of the evaluations and selection process.
- CED collaboration must be encouraged not only to support newcomers in the programme but also to encourage the exchange of relevant information and good practices. This will help CEDs become more effective advisory tools for their national applicants.

### CREATIVE EUROPE TOOLS

- The programme department should work harder on developing optimal e-form contents, structure, and adjusting these IT tools to different target audiences.
- This could also potentially shorten the evaluation period, which is currently far too long for the versatile audiovisual industry.
- The Participant Portal needs to be revamped in a user-friendly approach.
- The NING tool, with which users express overall satisfaction, could still be improved with more frequent updates and use of the latest information.

### THE LINES OF SUPPORT

- Generally, the programme is considered well suited to developments in the sector and new needs. It is not seen as overly structured but as well-structured even if a few CEDs commented that a bit more flexibility and room for quality rather than a points system would be welcome in project selection.
- To this consideration can be added, quite logically, the many criticisms of the points system, which produces certain effects seen as anti-competitive by large and small countries alike and which are verified in part in the table showing the results of the calls.
- The major recommendation is to review the automatic points-based system, which is today considered by small and large countries alike as anticompetitive. The policy of automatic points for low/intermediate/high production capacity countries should be revised and the three-layered system should be applied to calls for all schemes.
- The overall tendency of heightened competitiveness of applications in all funding schemes, in particular in Single Project Development, TV distribution, Video games, and distribution, for example, is quite visible.
- This enhances the quality of projects, however, due to the very high rejection rate, also tends to deter a large number of applicants with potentially strong projects from applying.



## 7. CONCLUSIONS

The Media subprogramme is viewed as effective overall at this stage. However, the effect of its success with an ever larger number of beneficiaries in the context of a budget seen as too small given the number of countries, seems to be a reduction in the average amounts granted per selected project. The failure rate of applications (by country and by line of support) is developing among certain "regulars" familiar with the programme a disillusionment that is starting to be reflected in decisions not to participate in certain calls for proposals.

For many countries, an increase in the budget is considered inevitable.

Lastly, for years, the Media programme in its various forms has relied on the Media Desks, which played a pilot role in the development and promotion of the Media programme. Today the film and audiovisual sector has moved into a more complex era where traditional business models are collapsing without being replaced by new models. More competition, more media, more distribution channels, more global players, but also less public funding and less protective regulation give European policy a more essential role than it has possibly ever had. It arouses great hopes but can also dash them. In this European project, the CEDs are more than ever a key tool for the Commission and for the Agency, because they are in contact with a growing number of stakeholders in more and more countries for a larger number of support options. They are indeed the strong arm, but also the eyes and ears of the programme on markets in Member States and elsewhere.

The Creative Europe Desks are a key component of the programme's success. Their views must be heard and heeded and their role safeguarded.




## 8. ANNEXES

### ANNEX I: QUESTIONNAIRE

- Q1. What were/are the biggest challenges (for the Media desk/overall?) in the transition from the old to the new programme, *in particular in the view of integrating Media into Creative Europe structure?*
- How have they been tackled (by Media desk/ the Commission/)?
  - Which support was offered by the Commission?
  - Did you receive enough information from EC?
- Q 2. What are the biggest remaining problems under the new programme?
- Q 3. In relation to collaboration with the Commission, which kind support/information/ do you still miss most?
- Q 4. What works well (better) under the new programme (in comparison to Media 2007)?
- What are the biggest advantages of the new media programmes (for beneficiaries? For Media desk?
- Q 5 Which new schemes have been so far most and the least beneficial for your respective market?
- Why?
  - Which administrative demands (requirements) do the beneficiaries (and applicants?) struggle with most?
- Q 6. How would you evaluate the new application process (online in comparison to paper applications, new application forms, etc.).
- What are the major issues the applicants face when delivering applications?
  - How efficient are the help-desks in solving these issues?
- Q 7 Which groups (category? i.e. producers, distributors, etc.) of applicants have the greatest problems (report the greatest number of issues, please mention the most important issues they face)?
- Q 8 In several fields, it is now institutions (/companies?) rather than individual applicants applying for funding. What are the experiences with the transition?
- Q 9 Which trends do you observe in the projects (in terms of the quality/number per scheme/ etc.)?
- Does the new programme reach new audiences (industry/ market/both?) in comparison to the old one,
  - Are there any changes in the structure of the applicants/beneficiaries perceptible?
- Q 10. Which suggestions do you have for improvement of:
- application process/forms, etc.?
  - co-working with the Commission?
  - other?



## ANNEX II: TABLE OF ANSWERS RECEIVED ON THE MCG WEBSITE

roundcube   
open source webmail software

Courriel    Carnet d'adresses    Paramètres    Déconnexion

Filtrer: Tous  Q\*

Dossiers	Date	Date	À	Objet	Taille
<b>Boîte d...ception (3)</b>	2016-05-03 10:09	Submiter	am@mediacg.tv		7 ko
Brouillons	2016-05-04 15:15	Submiter	am@mediacg.tv		8 ko
Envoyés	2016-05-04 19:08	Submiter	am@mediacg.tv		5 ko
Pourriels	2016-05-06 14:05	Submiter	am@mediacg.tv		5 ko
Corbeille	2016-05-09 10:58	Submiter	am@mediacg.tv		6 ko
Aventin	2016-05-09 13:40	Submiter	am@mediacg.tv		8 ko
Convergences	2016-05-09 14:37	Submiter	am@mediacg.tv		4 ko
DIFFA Barter	2016-05-09 15:18	Submiter	am@mediacg.tv		9 ko
DIFFA ...rmation	2016-05-09 16:26	Submiter	am@mediacg.tv		6 ko
Diffa gestion	2016-05-09 16:47	Submiter	am@mediacg.tv		13 ko
DIFFA prev	2016-05-09 17:23	Submiter	am@mediacg.tv		10 ko
DIFFA pr...p ventes	2016-05-09 17:48	Submiter	am@mediacg.tv		12 ko
Diffa ToA	2016-05-09 22:44	Submiter	am@mediacg.tv		6 ko
EP Media	2016-05-10 09:11	Submiter	am@mediacg.tv		5 ko
submiter	2016-05-10 09:52	Submiter	am@mediacg.tv		16 ko
Havas afrique	2016-05-10 10:51	Submiter	am@mediacg.tv		9 ko
<b>Liens ...eo RAI (16)</b>	2016-05-10 12:37	Submiter	am@mediacg.tv		6 ko
Liesn V...eo DIFFA	2016-05-10 13:01	Submiter	am@mediacg.tv		12 ko
MCG	2016-05-10 13:48	Submiter	am@mediacg.tv		11 ko
MCG Afrique	2016-05-10 14:06	Submiter	am@mediacg.tv		9 ko
MIA	2016-05-10 15:20	Submiter	am@mediacg.tv		19 ko
Perso	2016-05-10 15:53	Submiter	am@mediacg.tv		6 ko
PPMI	2016-05-10 17:29	Submiter	am@mediacg.tv		24 ko
Rai en cours	2016-05-10 21:05	Submiter	am@mediacg.tv		9 ko
RAI sc...enings	2016-05-11 01:11	Submiter	am@mediacg.tv		12 ko
RAI Prospects	2016-05-11 10:21	Submiter	am@mediacg.tv		8 ko
Rai Sport	2016-05-12 10:20	Submiter	am@mediacg.tv		20 ko
TVCO	2016-05-12 10:54	Submiter	am@mediacg.tv		23 ko
	2016-05-12 15:56	Submiter	am@mediacg.tv		23 ko
	Mer 19:56	Submiter	am@mediacg.tv		13 ko
	Ven 16:29	Submiter	am@mediacg.tv		7 ko

Sélectionner:    Fils:    Montrer le volet de prévisualisation: Courriels de 1 à 31 sur 31





## ANNEX III: TABLE OF RESULTS

### Creative Europe Media – Results of first selections

Funding Scheme/ Country	Distribution*	Access to markets	Development of single projects	Development Slate funding	TV Programming	Video game development	Audience development	Cinema networks	Film Festivals	International co-production funds	Training	Support for Online Distribution	TOTAL NUMBER OF APPLICATIONS awarded	TOTAL NUMBER OF APPLICATIONS delivered*
Albania	-	-	1	-	-	-	-	-	-	-	-	-	1	3
Austria	59	-	3	2	1	1	-	-	2	-	-	2	70	118
Bosnia & Herzegovina	24	2	4	-	-	-	-	-	2	1	-	-	33	79
Belgium	71	6	28	10	4	1	1	-	10	-	6	-	137	244
Bulgaria	28	1	4	2	1	-	-	-	2	-	2	-	40	99
Cyprus	2	-	2	-	1	-	-	-	-	-	-	-	5	17
Czech Republic	56	2	14	5	-	1	4	-	12	-	5	2	101	175
Germany	99	9	24	11	5	6	-	-	24	2	18	2	200	454
Denmark	55	3	18	12	13	7	3	-	2	-	8	-	121	199
Estonia	38	1	7	3	-	-	1	-	2	-	2	-	54	101
Greece	58	2	10	2	2	-	2	-	8	-	2	-	86	133
Georgia	-	-	-	-	-	-	-	-	-	-	-	-	-	3
Spain	65	6	19	3	1	2	3	-	8	-	2	2	111	374
Finland	31	-	16	7	4	4	-	-	8	-	-	-	70	148
France	112	23	20	29	30	7	5	1	22	1	22	15	287	777
Croatia	53	-	12	1	-	-	-	-	10	-	2	-	78	134
Hungary	63	-	13	1	-	1	-	-	4	-	-	2	84	144
Ireland	8	2	19	10	2	2	1	-	-	-	4	-	48	116
Iceland	20	-	9	1	4	-	-	-	2	-	-	-	36	61
Italy	67	5	23	5	2	3	2	-	10	2	12	-	131	500
Jordan	-	-	-	-	-	-	-	-	-	-	-	-	-	1
Liechtenstein	-	-	-	-	-	-	-	-	-	-	-	-	-	1
Lithuania	23	-	8	-	2	1	-	-	4	-	-	-	38	88
Luxembourg	15	-	3	1	-	-	-	-	-	-	4	-	23	36
Latvia	11	1	9	-	2	-	-	-	-	-	-	-	23	60
Malta	-	-	-	-	-	-	-	-	-	-	-	-	-	13
Montenegro	2	-	-	-	-	-	-	-	-	-	-	-	2	6

## Creative Europe Media – Results of first selections

Funding Scheme/Country	Distribution*	Access to markets	Development of single projects	Development Slate funding	TV Programming	Video game development	Audience development	Cinema networks	Film Festivals	International co-production funds	Training	Support for Online Distribution	TOTAL NUMBER OF APPLICATIONS awarded	TOTAL NUMBER OF APPLICATIONS delivered*
<b>FYRoM</b>	-	-	1	-	-	-	-	-	-	-	-	-	<b>1</b>	<b>1</b>
<b>Netherlands</b>	75	5	14	8	2	4	2	-	4	4	10	3	<b>131</b>	<b>215</b>
<b>Norway</b>	43	1	20	8	2	3	-	-	-	-	-	-	<b>77</b>	<b>122</b>
<b>Poland</b>	70	3	13	2	2	7	-	-	12	-	4	-	<b>113</b>	<b>217</b>
<b>Portugal</b>	54	-	5	1	-	-	-	-	10	-	-	-	<b>70</b>	<b>120</b>
<b>Romania</b>	45	-	10	3	1	-	1	-	8	-	-	-	<b>68</b>	<b>135</b>
<b>Serbia</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	<b>1</b>
<b>Sweden</b>	47	-	28	13	8	5	-	-	4	-	-	2	<b>107</b>	<b>319</b>
<b>Slovenia</b>	46	-	8	-	-	1	-	-	2	-	-	-	<b>57</b>	<b>107</b>
<b>Slovakia</b>	51	-	6	-	1	-	-	-	2	-	-	-	<b>60</b>	<b>117</b>
<b>Switzerland</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	<b>20</b>
<b>Turkey</b>	-	1	-	-	-	-	-	-	-	-	-	-	<b>1</b>	<b>3</b>
<b>United Kingdom</b>	49	4	10	9	18	5	3	-	4	-	14	5	<b>121</b>	<b>423</b>
<b>Total number of selected projects per scheme</b>	<b>1438</b>	<b>77</b>	<b>381</b>	<b>149</b>	<b>106</b>	<b>61</b>	<b>28</b>	<b>1</b>	<b>158</b>	<b>10</b>	<b>117</b>	<b>35</b>	<b>809</b>	<b>1806</b>

\* Data unavailable for Distribution: Support for sales agents, call ref. EACEA 07/2013; Distribution - Automatic support, call ref. EACEA 25/2012; Support for Film Festivals, call ref. EACEA/16/2015; Support for Access to Markets call ref. EACEA/15/2015





DIRECTORATE-GENERAL FOR INTERNAL POLICIES

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