



EUROPE LOVES CINEMA

Supporting growth in the European audiovisual industry

SURVEY OF THE
CATALONIA'S
MEDIA PROGRAMME FUNDING
RECIPIENTS



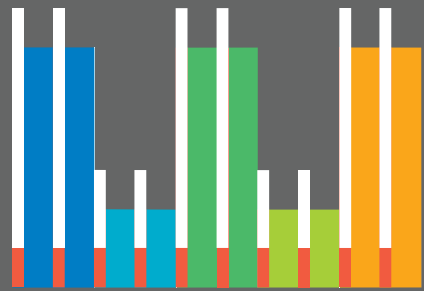
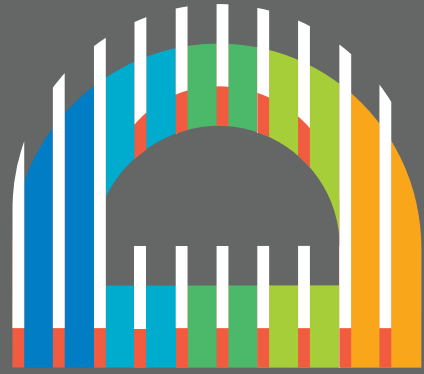
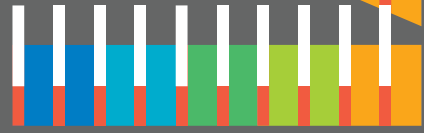
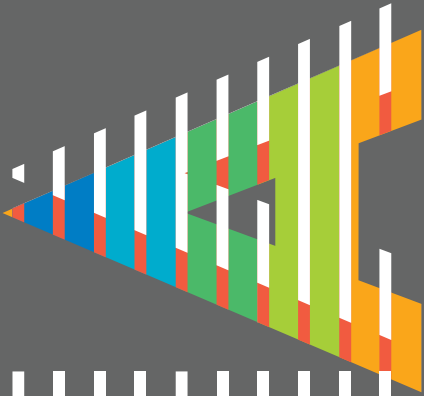
METHODOLOGY AND ANALYSIS OF PARTICIPANTS

In order to find out what impact the MEDIA programme has had on the Catalan audiovisual industry, in October 2012 we conducted an online survey of aid recipients from the programme.

MEDIA Antena Catalunya sent its survey via email to 89 beneficiaries of the MEDIA Programme since the beginning of its activities in Catalonia in 1991. The survey was completed by 76 professionals from different areas of the sector.

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GREETING



GORKA KNORR,
ICEC DIRECTOR

There is no need to insist on the importance of the audiovisual industry in Catalonia. But what we must do, if nothing else, is to provide our society and all those involved in the sector, with a brief summary of the objective data that will grant us an insight into the industry's exact scope.

And this is exactly what we are doing here at MEDIA Antena Catalunya, where we seek to channel the European funds granted in order to highlight topics of such vital importance to the audiovisual sector as financial aid for the development of projects, training or networking. These activities are carried out thanks to personalised contact with our creators and professionals.

We do this because we would like to venture beyond the numbers that illustrate the sector's strength; because we believe in the sector and its professionals; because we know what this means for Catalonia's economy and for its industrial and cultural tapestry; and because, as a result, we want to make it grow and become more competitive, taking on a comprehensive strategic outlook with which to win the wonderful battle of claiming its place in the digital era.

I would like to thank all those who, through their close ties with the audiovisual sector, have carried out a very valuable task at the heart of MEDIA Antena Catalunya over these past decades, and who have turned it into a state-of-the-art office thanks to the amount and quality of the work they have poured into their projects.

I hope it remains for many years to come, for the sake of our audiovisual sector, at the forefront of Catalonia's future economic scene.

THE AUDIOVISUAL INDUSTRY IN CATALONIA



PAINLESS (MEDIA I2I AUDIOVISUAL)

The Catalan audiovisual industry represents one of the key drivers of the industry in Spain as a whole, and is a sector of strategic importance within the Catalan economy: In 2009, the Catalan audiovisual sector represented 11% of the GVA (Gross Value Added) generated by the sector as a whole in Spain, as well as a contributing EUR 189 million to the Catalan economy.

According to data from the Statistical Institute of Catalonia, the volume of business generated in the country by companies in the audiovisual sector that year was EUR 1,812 million, more than 17% of the total for Spain. Of this overall figure, 82% came from film and video activities, while nearly 18% came from radio and television activities.

In Catalonia, according to the Register of Audiovisual Companies, there are 1,466 companies dedicated mainly to the production and distribution of audiovisual works, cinematic exhibition, dubbing of audiovisual works, export and ancillary technical services. Three years ago, these companies employed more

than 13,000 people, 18% of the Spanish sector as a whole. It should be noted, given the economic crisis affecting the whole of Spain, this number may have declined, since the audiovisual sector is one of the worst affected areas.

One notable aspect is that, of the people employed, the majority (59%) perform film and video activities, of which 73% are devoted to the production of film, video and television programmes, while the remaining 27% engage in film, video and television distribution activities and cinema exhibition.

According to data from the last decade, Catalonia accounts for almost 40% of the production of feature films in Spain, with 596 Catalan films produced out of the 1,595 produced in Spain, a figure that reached 50% only a couple of years ago. As for co-productions, Catalonia represents 34% of the international co-productions in Spain.

Revenue and audience figures are not far behind either. In Spain as a whole, only the Community of Madrid exceeds Catalonia in cinema box office returns and audience numbers.

Just in 2011, Catalonia received over 20 million spectators in cinemas and grossed almost EUR 137 million at the box office, 20% of the total for Spain in both cases, while showing 60% of titles nationally. In 2012 there have also been major box office returns, with films such as *Les aventures d'en Tadeu Jones (Tad, the Lost Explorer)* and *Tengo ganas de ti (I Want You)*, both Catalan productions, being among the highest grossing Spanish films of the year.

These figures demonstrate that, although Spain is at the top of the ranking of countries with the most illegal downloads, in Catalonia, attendance at cinemas remains one of the most frequent cultural consumption activities. Figures from recent years show that 40% of the population studied regularly goes to the cinema, an average of 11.4 times per year. Age is also a determining factor: between 15 and 29 years, 91% of people attend the cinema; between 30 and 44, this figure is 80%; it comes down to 62% between 45 and 64 years, and only 32% among people aged 65 or over.

In any case, it should be noted that the high attendance at cinemas does not always mean a greater share for locally made films. In 2011, 68% of spectators in Catalan cinemas opted to see U.S. produced films, 15% chose productions from EU countries, 7% went to Catalan productions and the same percentage opted for productions from the rest of Spain.

It is in this area where the MEDIA programme undertakes an important task, supporting the European audiovisual industry through the financing of training initiatives for audiovisual industry professionals, the development of projects (feature films, television, documentaries, animation, new media) and the promotion of the European audiovisual sector.

Given that Catalonia accounts for 16% of the population of Spain as a whole and only 6% of its land area, the support of the MEDIA programme is another demonstration of the strength and quality of the Catalan audiovisual industry: Cata-

lonia receives on average 40% of all MEDIA aid for Spain as a whole, reaching higher figures in the case of grants to production companies, such as support for development, with 46.13% in the last decade; i2i Audiovisual aid, with 44.95%, and promotional aid, including festivals and markets, with 50%.

At the European level, where MEDIA currently reaches 32 countries, the figures are also revealing: the Catalan audiovisual industry represents almost 3% of the MEDIA funding received with respect to the rest of Europe. In this case, it is support for promotion, distribution and access to finance (i2i Audiovisual) that has achieved the highest percentages over the last ten years.

Through the MEDIA Programme, the Catalan audiovisual industry has received nearly EUR 28 million in the past 10 years, distributed among its different areas, as can be seen below:

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Training	333.650	286.315	225.000	171.813	169.271		123.127	175.000	180.000	184.516	190.000
Development	385.000	170.000	475.000	450.000	440.000	260.000	505.000	649.000	765.574	561.524	385.000
i2i Audiovisual		164.781	172.268	127.460	50.000	145.288	78.730	50.000	50.000	81.562	101.486
Promotion	405.659	191.099	200.000	226.500	260.000	194.000	140.000	200.000	201.000	217.000	215.500
Distribution	1.169.914	1.525.334	2.142.678	1.304.173	1.036.815	2.660.468	1.020.087	1.690.412	1.307.285	987.828	630.294
Cinema Exhibition	72.000	100.000	125.000	141.600	170.000	187.500	205.000	176.500	221.000	213.500	214.000
TOTAL	2.366.223	2.437.529	3.339.946	2.421.546	2.126.086	3.447.256	2.071.944	2.940.912	2.724.859	2.245.930	1.736.280
	27.858.511										

SOURCE: annual report 2011 by ICEC (Catalan Institute for the Cultural Companies), ICAA (Institute of Cinematography and Audiovisual Arts), *Film Production in Catalonia. Features and dimensions*. José i Solana, C. *Observatori de la Producció Audiovisual*, 2012. Statistics on the Audiovisual Sector in Catalonia 2010, IDESCAT; Cultural Consumption and Practices Survey 2006, IDESCAT; annual results of the MEDIA Programme in Brussels.

IT IS ESTIMATED THAT OVER THE TWENTY YEARS OF ACTIVITY OF THE MEDIA PROGRAMME IN CATALONIA, THE CATALAN AUDIOVISUAL SECTOR HAS RECEIVED AROUND EUR 40 MILLION IN INVESTMENT.

WHAT OPINION DOES THE CATALAN AUDIOVISUAL INDUSTRY HAVE OF MEDIA?

«Funding from institutions is an important part of the income of our festival. MEDIA aid gives a major boost to the screening of European films.»

«Thanks to the financial support from the MEDIA programme, our cinema can ensure quality programming and provide a range that goes beyond purely commercial cinema.»

«The support we receive from the programme covers 40% of the budget of our business. This contribution is essential in order to carry it out successfully.»

«So far, we have only had experience with aid for development. The aid, as well as enabling a more complete development process, is a guarantee in the marketplace.»

The aid from MEDIA is not only important in economic terms, but has also served as recognition of the value of the project and opened the doors to finding other sources of funding.»

«MEDIA's support has determined the viability of some of our projects.»

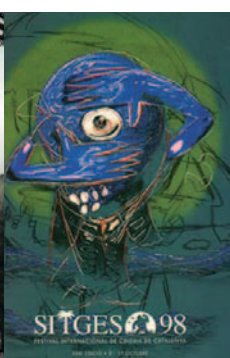
«It has served as a learning process for us. It is a major international endorsement.»

«The contribution by MEDIA has been invaluable in all the projects on which I have worked, whether directly achieved by my company or not.»

«The quality and diversity of knowledge gained in the courses funded by MEDIA, which were very practical and oriented towards the day-to-day operations of production companies, were very helpful. So was the networking group that was created out of the course.»

«The courses funded by MEDIA are essential for expanding a network of contacts.»

«A continued presence, coupled with the success of some of the productions, means that now commissioning editors and buyers recognize me as a player to consider. In other words, attending networking events funded by MEDIA helped me to stop being invisible.»





«Taking part in MEDIA meetings gives you general visibility. In other words, it means that you exist, that you are part of something that you can establish a network based on mutual recognition that goes beyond consolidating your work at a practical level. And this issue, which is more general, in my opinion, is important because it forces you to look at each other and ask yourselves how you can keep doing whatever you do.»

«It is important to keep these spaces for meeting, for intermingling, for synergies, that go beyond the immediate practical and concrete results linked to productions. I think working over the long term is essential to what we do. It seems much more important and interesting to me to make more of a commitment to sustainability (we are passengers, but what we do remains) than viability (which can be lucrative, but could use up resources quickly without leaving a true legacy).»

«It's a way to get closer to Europe in an effective manner.»

«The requirements of MEDIA "oblige" you to work directly on development in a way that makes you learn a lot.»

«The work and reflection involved in applying for a MEDIA grant is an effort that is useful for the project whether or not you receive the grant.»

«It would not have been achieved without the personalized attention of the Antena.»

«MEDIA provides money for the project, but also prestige and quality assurance.»

«The demanding nature of the application process allows you to work on needed aspects of the film. Thinking about it from the beginning requires a broadening of perspectives, to think about the project from a different point of view, to anticipate, imagine, plan... right from the draft phase. As a whole it is always beneficial and allows you to strengthen the proposal, making it more solid, enhancing the commitment and consistency in the proposal itself and in the way you work on it.»

«Being able to work more in-depth on development has repercussions on the final outcome of the project.»

«The process of applying for the grant has helped us to improve our planning of projects and the overall structure of the company.»



AN OVERVIEW

91,8%

of respondents who have received a MEDIA grant for **development** believe that it has been «very effective» or «effective» in taking **projects from development to production**.

75%

of respondents who have received a MEDIA grant for cinema **exhibition** consider that the support has been «very effective» when enabling the screening of **non-national European films in their cinemas**.

«WITHOUT MEDIA ANTENA CATALUNYA, OUR BUSINESS DEVELOPMENT WOULD NOT HAVE BEEN POSSIBLE.»

77,2%

of respondents who have attended a **networking** event funded by MEDIA say that it has **improved their position with buyers and investors**.

«THE MEDIA PROGRAMME IS AN EXAMPLE OF A GOOD OPERATION. IF SOMETHING WORKS, DON'T CHANGE IT!»

71,4%

of respondents who have received a MEDIA grant for **distribution** consider it «very effective» or «effective» in the **acquisition of foreign films** that otherwise would not have been purchased by their company.

«THE EVENTS ARRANGED BY MEDIA ARE ESSENTIAL TO MAINTAINING AND EXPANDING A NETWORK OF CONTACTS WITH WHOM WE CAN ADDRESS CURRENT AND FUTURE BUSINESS PARTNERSHIPS.»

94,7%

of respondents who attended a course **funded by MEDIA** say it has allowed them to **improve their specialist knowledge**.



JULIA'S EYES (MEDIA I2I & MEDIA DISTRIBUTION)

91,7%

of respondents who have received a **MEDIA grant for television broadcast** consider it «very effective» or «effective» when **maximizing the international potential of their project.**

«THE PROCESS OF A MEDIA GRANT REQUIRES PRIOR ANALYSIS AND REFLECTION REGARDING THE COMMERCIAL VIABILITY OF THE PROJECT.»

67%

of respondents believe that the support of the **MEDIA programme** was «effective» **in the consolidation of their business.**

93,4%

of respondents «strongly agreed» or «agreed» that the service offered by **MEDIA Antena Catalunya** is **necessary for the Catalan audiovisual industry.**

MEDIA DEVELOPMENT FUNDING

OBJECTIVE: TO PROMOTE, VIA THE AWARDING OF FINANCIAL ASSISTANCE, THE DEVELOPMENT OF PRODUCTION PROJECTS INTENDED FOR INTERNATIONAL MARKETS WHICH ARE PRESENTED BY INDEPENDENT EUROPEAN PRODUCERS WITHIN THE FOLLOWING GENRES: FICTION, CREATIVE DOCUMENTARIES AND ANIMATION.

The development grant has several lines of action: Single Project, Slate Funding, Slate Funding 2nd Stage and Interactive Work.

In the last ten years, the MEDIA programme has allocated nearly EUR 5 million in development grants for projects in Catalonia, a figure that represents 2.53% of development grants in Europe as a whole and a remarkable 43.08% of the total for Spain.

2008 and 2009 were the years of greatest prosperity for the Catalan audiovisual industry in terms

of funding from the MEDIA programme, coming at a good time for the sector in general.

According to the lines of action, Single Project development aid has been received annually since 2001, with a total of EUR 2,893,798 invested by the MEDIA programme. It should be noted that, in 2011 the only project in Spain as a whole receiving support in Interactive Works (a line active since 2009) was a Catalan project.



CERVANTES AND THE LEGEND OF DON QUIXOTE (MEDIA DEVELOPMENT)



75,5%

of respondents who have received a MEDIA grant for **development** believe it has been «very effective» or «effective» for their project.

«HAVING TO MAKE THE EFFORT, FROM THE FIRST STAGES OF DEVELOPMENT, TO DESIGN A COHERENT OVERALL STRATEGY FOR THE PROJECT HAS ALLOWED US TO ANTICIPATE MANY FUTURE NEEDS.»

69,4%

of respondents who have received a MEDIA grant for **development** believe it has been «very effective» or «effective» in **improving the quality of the script**.

«MEDIA HELPS TO CONSOLIDATE AND MOVE THE PROJECT FORWARD.»

«MEDIA STIMULATES THE QUALITY OF PROJECTS EVEN WHEN IT DOES NOT PROVIDE FINANCIAL SUPPORT.»

85,7%

of respondents who have received a MEDIA grant for **development** consider that it has helped to **build trust with their partners and/or future collaborators**.

76,1%

of respondents who have received a MEDIA grant for **development** consider «very important» or «important» the fact that **the grant allowed them to safeguard creative control over the project**.

91,8%

of respondents who have received a MEDIA grant for **development** believe that it has been «very effective» or «effective» in **taking projects from development to production**.

«MEDIA IS A STRATEGIC GRANT WHICH PROVIDES RECOGNITION OF QUALITY AND/OR VIABILITY WHEN DEALING WITH THIRD-PARTY SOURCES OF FUNDING AND – WHY NOT? – OF TECHNICAL AND ARTISTIC TALENT TOO.»

MEDIA TV BROADCASTING FUNDING

OBJECTIVE: TO PROMOTE THE TRANSNATIONAL DISSEMINATION OF EUROPEAN AUDIOVISUAL WORKS PRODUCED BY INDEPENDENT EUROPEAN PRODUCTION COMPANIES BY ENCOURAGING COOPERATION BETWEEN BROADCASTERS ON THE ONE HAND AND INDEPENDENT PRODUCERS AND DISTRIBUTORS ON THE OTHER.

In the last ten years, the MEDIA programme has allocated EUR 2,694,791 to support the dissemination of projects for television. It should be noted that the only two Spanish projects receiving support from this line of the programme in 2012 came from Catalonia

«MEDIA IS AN ESSENTIAL PLATFORM FOR THE SUSTAINABILITY AND THE MERE EXISTENCE OF THE EUROPEAN AUDIOVISUAL INDUSTRY.»

«THE SUPPORT OF MEDIA HAS ALLOWED US TO CONSOLIDATE OUR PRESENCE IN THE INTERNATIONAL ARENA AND, THEREFORE, HAS BEEN EFFECTIVE IN CONSOLIDATING THIS PART OF OUR BUSINESS».

44,4%

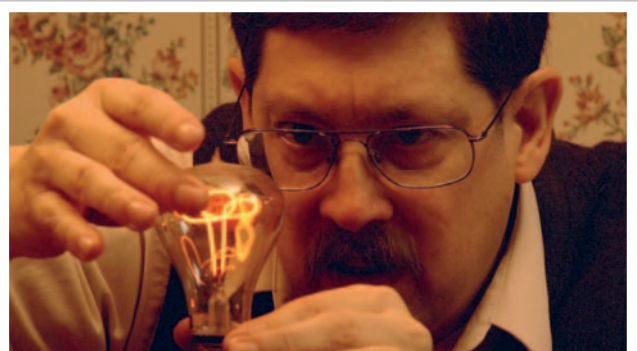
of the respondents who have received a MEDIA grant for television believe that the documentary genre is the most difficult to finance.

100%

of respondents who have received a MEDIA grant for television consider it «very effective» or «effective» in achieving the necessary financing for their projects.

91,7%

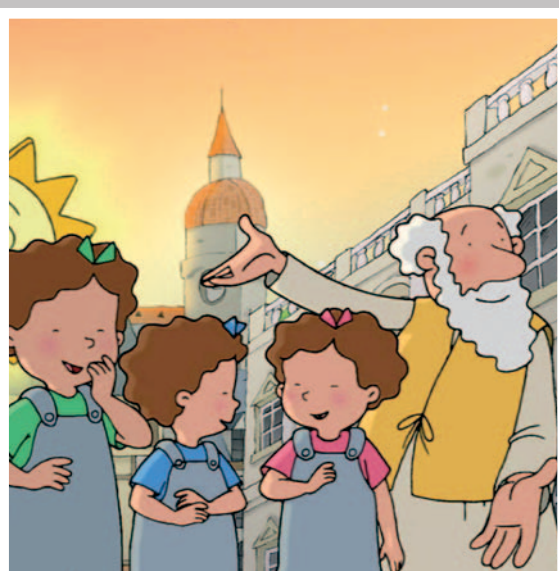
of respondents who have received a MEDIA grant for television broadcast consider it «very effective» or «effective» when maximizing the international potential of their project.



THE LIGHT BULB CONSPIRACY –
THE UNTOLD STORY OF PLANNED OBSOLESCENCE
(MEDIA TV BROADCASTING)

MEDIA I2I AUDIOVISUAL FUNDING

OBJECTIVE: TO PROMOTE, BY PROVIDING FINANCIAL SUPPORT, PRODUCTION PROJECTS (FICTION FILM AND TELEVISION, CREATIVE DOCUMENTARIES, ANIMATED FILMS FOR TELEVISION OR CINEMA, WORKS WHICH USE THE AUDIOVISUAL AND CINEMATOGRAPHIC HERITAGE) SUBMITTED BY INDEPENDENT COMPANIES, IN PARTICULAR SMALL AND MEDIUM ENTERPRISES, AND TARGETING THE INTERNATIONAL MARKETS, AS WELL AS PROMOTING PRODUCTION PROJECTS THAT MAKE USE OF NEW TECHNOLOGY CREATION, PRODUCTION AND DISSEMINATION.



THE NEW ADVENTURES OF THE TRIPLETS
(MEDIA I2I AUDIOVISUAL)

2i Audiovisual Aid began to be granted in 2002. Since then, the MEDIA programme has earmarked more than EUR 1 million to provide financial support to projects from Catalonia.

Over the last decade, this has been the grant with the highest award percentage in Catalonia, representing nearly 4% of the funding for Europe as a whole and nearly half (49.91%) that of Spain as a whole.

After a number of years (2007-2010) with lower amounts of aid, in 2011 MEDIA contributed EUR 101,486 in financial support to Catalan projects, coinciding with one of the most difficult moments for the sector in terms of getting financing for its projects.

«IT HAS HELPED US WITH THE FINANCING OF THE PROJECT.»

«IT HAS REDUCED OUR RISK.»

91,7%

of respondents who have received a **MEDIA i2i Audiovisual** grant have received it for **fiction projects**.

72,8%

of respondents who have received a **MEDIA i2i Audiovisual** grant consider it «very effective» or «effective» in **bringing the project to fruition**.

MEDIA DISTRIBUTION FUNDING

OBJECTIVE: THE AIM OF THIS CALL IS TO ENCOURAGE AND SUPPORT A WIDER TRANSNATIONAL DISTRIBUTION OF RECENT EUROPEAN FILMS BY PROVIDING FUNDS TO DISTRIBUTORS, BASED ON THEIR ROLE IN THE MARKETPLACE, FOR SUBSEQUENT RE-INVESTMENT IN NEW NON-NATIONAL EUROPEAN FILMS. THIS AID MODE IS ALSO INTENDED TO ENCOURAGE THE DEVELOPMENT OF LINKS BETWEEN THE PRODUCTION AND DISTRIBUTION SECTORS AND TO THUS IMPROVE THE PRESENCE AND COMPETITIVENESS OF NON-NATIONAL EUROPEAN FILMS IN THE MARKET.

Since 2001, the MEDIA programme has contributed almost EUR 11 million to the Catalan audiovisual industry in Selective and Automatic Distribution grants, which represents around 25% of Spain as a whole. This data is extremely positive, taking into account that most of the European Distribution business in Spain is centralized in Madrid.



BURIED (MEDIA DISTRIBUTION)

71,4%

of respondents who have received a MEDIA grant for **distribution** consider it «very effective» or «effective» in the **acquisition of foreign films that otherwise would not have been purchased by their company.**

«WITHOUT MEDIA, THERE WOULD BE A DECREASE IN THE NUMBER OF ACQUISITIONS, THE NUMBER OF COPIES ON DISPLAY AND THE PROMOTION OF THE FILM IN THE DIFFERENT FORMS OF MEDIA.»



ECCENTRICITIES OF A BLOND HAIR GIRL
(MEDIA DISTRIBUTION)

50%

of respondents who have received a MEDIA grant have **reinvested the funds in distribution costs for new non-national European films.**

«WE VERY MUCH TAKE INTO ACCOUNT WHETHER THE FILMS WE WANT TO DISTRIBUTE HAVE THIS SUPPORT BEFORE DISTRIBUTING THEM. WITHOUT THIS AID, WE WOULD BE UNABLE TO CARRY MANY TITLES.»

71,5%

of respondents who have received a MEDIA grant for **distribution** consider it «very effective» or «effective» in the **sustainability of their business.**

«LESS CHANCE OF DISTRIBUTION IN GENERAL.»

MEDIA CINEMA EXHIBITION FUNDING

OBJECTIVE: TO IMPROVE THE CIRCULATION OF NON-NATIONAL EUROPEAN FILMS IN THE INTERNATIONAL MARKETS THROUGH MEASURES THAT PROMOTE THEIR MARKETING, THEIR DISTRIBUTION IN ALL FORMS OF MEDIA AND THEIR PROGRAMMING IN CINEMAS AS WELL AS ENCOURAGING THE SCREENING OF NON-NATIONAL EUROPEAN FILMS IN THE EUROPEAN MARKET, IN PARTICULAR BY SUPPORTING THE COORDINATION OF A CIRCUIT OF CINEMAS.

The MEDIA programme has allocated EUR 1,744,100 in aid for exhibition in Catalonia over the last decade, which represents nearly 2% of Europe as a whole and more than 20% of Spain as a whole.

Grants for cinemas exhibition in the Catalan audiovisual industry have been on the rise since 2001, with just a slight decrease in 2008 and 2011.

«OUR CINEMA HAS ALWAYS BEEN KNOWN FOR ITS DEFENSE OF EUROPEAN CINEMA. THE PROBLEM IS THAT THE EXHIBITION MARKET NEEDS MORE DYNAMISM REGARDING THE CIRCULATION OF THE COPIES.»

75%

of respondents who have received a MEDIA grant for cinema **exhibition** consider that the support has been «very effective» for **enabling the screening of non-national European films in their cinemas.**

100%

of respondents who have received a MEDIA grant for cinema **exhibition** consider it «effective» for **extending the cinema run of a non-national European film.**

50%

of respondents who have received a MEDIA grant for cinema **exhibition** consider that the aid has been «effective» in **creating new audiences for their cinemas.**

75%

of respondents who have received a MEDIA grant for cinema **exhibition** «agree» with the fact that the grant **allows the exchanging of ideas and experiences with other members of the Europa Cinemas network.**

MEDIA DIGITIZATION FUNDING

OBJECTIVE: ENCOURAGE CINEMAS THAT SHOW A SIGNIFICANT PERCENTAGE OF NON-NATIONAL EUROPEAN FILMS TO TAKE ADVANTAGE OF THE POSSIBILITIES OFFERED BY DIGITAL DISTRIBUTION, AND TO FACILITATE THE DIGITAL TRANSITION OF CINEMAS SHOWING EUROPEAN FILMS BY FUNDING THE INDIRECT COSTS ASSOCIATED WITH THE PURCHASE OF A DIGITAL PROJECTOR.

«WITHOUT MEDIA EUROPEAN CINEMA WOULD PROBABLY BE THE MOST AFFECTED, SINCE WITH THE GRANT WE STRIVE TO ALWAYS HAVE A MINIMUM OF TWO SESSIONS OF EUROPEAN CINEMA.»

100%

of respondents who have received MEDIA support for **digitization** believe that the grant has been «effective» in **facilitating the digital transition of cinemas.**

100%

of respondents who have received MEDIA support for **digitization** believe the programme has been «effective» in **creating new audiences for their theatres.**

«DIGITIZATION WAS MADE POSSIBLE, IN PART, THANKS TO THE HELP OF THE MEDIA PROGRAMME, HOWEVER, BEFORE THAT 80% WAS FINANCED BY THE COMPANY.»



PRINCESSES (MEDIA DISTRIBUTION)

MEDIA TRAINING FUNDING

OBJECTIVE: TO DEVELOP A FULL RANGE OF TRAINING INITIATIVES FOR PROFESSIONALS BY RESPONDING TO THE CURRENT NEEDS OF THE EUROPEAN AUDIOVISUAL INDUSTRY. ELIGIBLE APPLICANTS ARE INSTITUTIONS, ASSOCIATIONS, ORGANIZATIONS AND EUROPEAN COMPANIES WHOSE TRAINING INITIATIVES WILL CONTRIBUTE TO ACHIEVING THE OBJECTIVES OF THE MEDIA PROGRAMME.

The MEDIA programme has supported training for professionals in Catalonia, providing over EUR 2 million in grants since 2001, with only one year, 2006, in which no funding was received from this line.

The amount of aid to the Catalan audiovisual industry represents 2.6% of subsidies in the European sphere and almost 35% of Spain as a whole.

66,7%

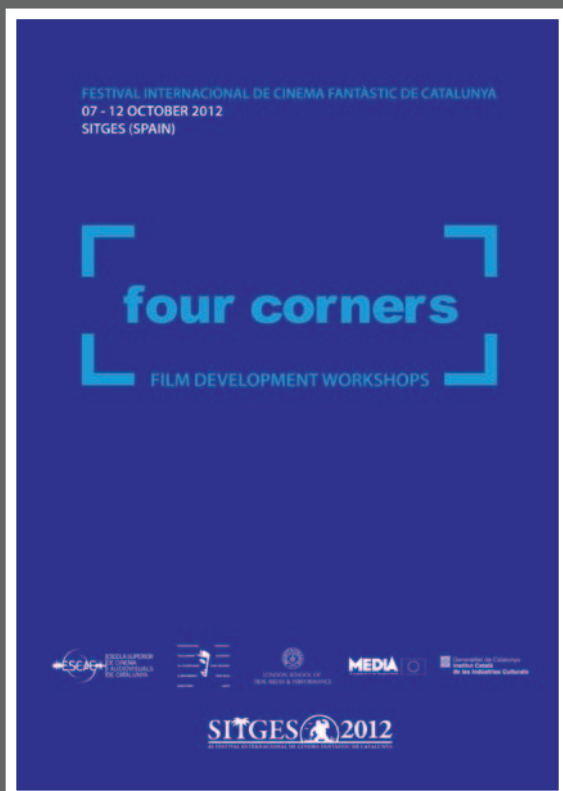
of respondents who have received a MEDIA grant for **training** consider that the support has been «effective» when it comes to **financing their training activities**.

66,7%

of respondents who have received a MEDIA grant for **training** consider that the grant has been «effective» for **finding other sources of funding and/or partners**.

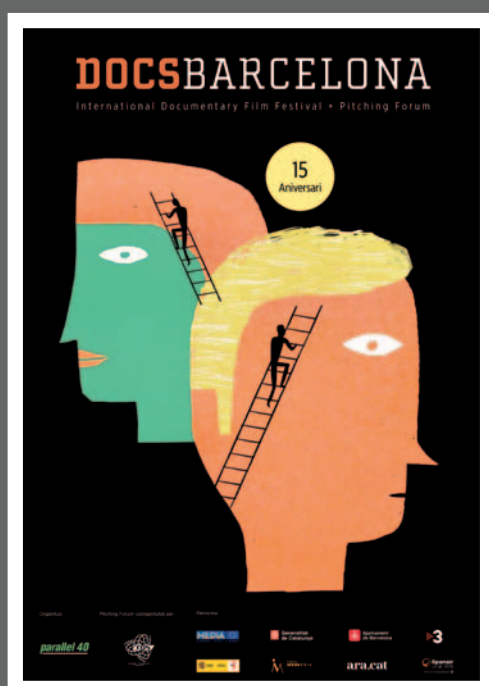
66,7%

of respondents who have received a MEDIA grant for **training** «agree» that the grant **builds trust in their training activities**.



MEDIA FUNDING FOR PROMOTION AND ACCESS TO MARKETS

OBJECTIVE: TO FACILITATE AND ENCOURAGE THE PROMOTION AND CIRCULATION OF EUROPEAN AUDIOVISUAL AND CINEMA PIECES IN THE CONTEXT OF COMMERCIAL EVENTS, CONVENTIONS AND AUDIOVISUAL FESTIVALS IN EUROPE AND THE WORLD, WHEN THESE EVENTS PLAY A MAJOR ROLE IN THE PROMOTION OF EUROPEAN WORKS AND THE CREATION OF PROFESSIONAL NETWORKS, AND TO FOSTER THE CREATION OF A NETWORK OF EUROPEAN OPERATORS, SUPPORTING JOINT ACTIONS UNDERTAKEN WITHIN THE EUROPEAN AND INTERNATIONAL FRAMEWORK BY NATIONAL PROMOTION BODIES, WHETHER PUBLIC OR PRIVATE.



Grants for promotion and access to markets by MEDIA since 2001 have brought EUR 1,775,659 to Catalonia, where, apart from the peak of that year, stable numbers have been maintained throughout the decade with an average annual contribution of EUR 143,500.

80%

80% of the respondents who have received support from MEDIA for **promotion and access to markets** consider that the grant has been «very effective» in the **organization of events at which Catalan industry professionals can interact with others from the international sphere.**

80%

80% of the respondents who have received support from MEDIA for **promotion and access to markets** consider that the grant has been «very effective» for the **participants at these events when bringing their projects forward from development into production.**

60%

60% of respondents who have received support from MEDIA for **promotion and access to markets** «strongly agree» that the grant **reduces the cost of organizing these events and facilitates access for participants.**

80%

80% of respondents who have received support from MEDIA for **promotion and access to markets** consider that the grant has been «very effective» in the search for **other sources of funding and/or partners.**

MEDIA FESTIVALS FUNDING

OBJECTIVE: TO FACILITATE AND ENCOURAGE THE PROMOTION AND CIRCULATION OF EUROPEAN AUDIOVISUAL AND CINEMATIC PIECES AT TRADE SHOWS, FAIRS AND AUDIOVISUAL FESTIVALS IN EUROPE AND BEYOND, SINCE THESE EVENTS COULD PLAY AN IMPORTANT ROLE IN THE PROMOTION OF PIECES AND THE NETWORKING OF PROFESSIONALS FROM EUROPE, AS WELL AS IMPROVING ACCESS BY EUROPEAN AND INTERNATIONAL AUDIENCES TO EUROPEAN AUDIOVISUAL WORKS.

The MEDIA programme, through support for festivals, has contributed EUR 675,099 to Catalonia since 2001 from this line of action, with an average of EUR 56,000 per year, except in 2005; when MEDIA contributed almost double that amount.

66,7%

of respondents who have received a MEDIA grant for **festivals** consider that the grant has been «effective» in allowing the screening of European films at their festival.

66,6%

of respondents who have received a MEDIA grant for **festivals** consider that the grant has been «very effective» for the **participation of top industry professionals** at their festival.

«THE GRANT FROM MEDIA GIVES A MAJOR BOOST TO THE SCREENING OF EUROPEAN FILMS AT OUR FESTIVAL.»

66,7%

of respondents who have received a MEDIA grant for **festivals** consider that the MEDIA grant has **increased the number of accredited guests** from the industry.

«THE MEDIA PROGRAMME HAS HELPED BY COLLABORATING IN THE PROMOTION OF THE CONFERENCE AMONG INDUSTRY PROFESSIONALS.»

MEDIA FUNDING FOR VOD AND DIGITAL CINEMA DISTRIBUTION

OBJECTIVE: TO SUPPORT THE CREATION AND MARKETING OF CATALOGUES OF EUROPEAN WORKS TO BE DISTRIBUTED DIGITALLY ACROSS BORDERS TO A WIDER AUDIENCE AND/OR TO CINEMA EXHIBITORS THROUGH ADVANCED DISTRIBUTION SERVICES THAT INCLUDE THE DIGITAL SECURITY SYSTEMS NEEDED TO PROTECT ONLINE CONTENT, AS WELL AS ENCOURAGING THE EUROPEAN AUDIOVISUAL INDUSTRY TO ADAPT ITSELF TO NEW DEVELOPMENTS IN DIGITAL TECHNOLOGY.

MEDIA aid to VoD is a line of action, which was first awarded in 2008. Since then, except in 2009, in which no grants were made, MEDIA has brought EUR 1,453,808 to Catalonia for the consolidation of a new model of consumption and the creation of a new audience.

50%

of respondents who have received a MEDIA grant for **VoD and digital cinema distribution** consider that it has been «effective» in **providing a legal framework for a new consumption model.**

«WITHOUT MEDIA, OUR PROCUREMENT POLICY – AND OUR BUSINESS MODEL IN GENERAL – WOULD BE MORE ECONOMICALLY AND, PRESUMABLY, EDITORIALY CONSERVATIVE.»

100%

of respondents who have received a MEDIA grant for **VoD and digital cinema distribution** consider that the grant has been «very effective» in **providing incentives for VoD and digital distribution in Europe.**

100%

of respondents who have received a MEDIA grant for **VoD and digital cinema distribution** consider it «very effective» in the use of **new technologies to create a new audience.**

100%

of respondents who have received a MEDIA grant for **VoD and digital cinema distribution** consider that the grant has been «very effective» in the **consolidation of their business.**

THE FUTURE: THE 2014/2020 FRAMEWORK

The Creative Europe programme will support European cinema and the cultural and creative industries, and will increase its contribution for the creation of jobs and economic growth. With a proposed budget of EUR 1,800 million for the period 2014-2020, Creative Europe will provide support to tens of thousands of artists, cultural professionals and cultural organizations in the fields of performing arts, fine arts, publishing, film, television, music, interdisciplinary arts, heritage and the video gaming industry, and will help them to operate across Europe to reach new audiences and develop the skills needed in the digital era. Assisting European cultural productions to reach new audiences in other countries, the new programme will also help to safeguard and promote cultural and linguistic diversity in Europe.

Creative Europe will accommodate the MEDIA programme (and the MEDIA MUNDUS programme) as well as the CULTURE programme. During 2013 there will be negotiations to put the finishing touches on defining the new programme and its sectorial lines of aid. So far, we know that it will enjoy a higher budget

and that it is intended to be a first window of access to funding platforms for cultural companies. Europe aims to provide a response to an industry, that of culture, that it knows is suffering deeply from the crisis, by providing a more simple and flexible system.

Culture plays a central role in the economy of the EU-27. European Union studies have shown that the cultural and creative industries form around 4.5% of the GDP of the EU, representing 3.8% of jobs (8.5 million jobs, and many more if we take into account its impact on the other sectors that it influences). The study shows that the sector has impressive growth potential: between 2000 and 2007, employment in these sectors has grown an average of 3.5% annually, compared with 1% in the rest of the economy of the EU-27. The rate of employment growth in these sectors in the United States and China were also higher, with an average of 2% annually. Europe is, by far, the world leader in export of creative industries. To maintain this position, we need to invest in the sector's capability to operate across borders.



BRUC: THE MANHUNT (MEDIA DEVELOPMENT)



CHILDISH GAMES (MEDIA DEVELOPMENT)

Creative Europe responds to this need with a more strategic plan to guide investment to where its impact will be greater.

Creative Europe takes into account the challenges created by globalization, in particular the impact of digital technologies that are changing the way in which cultural products are made, distributed, accessed and transformed into revenue streams and business models. However, these developments also create opportunities for cultural and creative industries in Europe, and the programme seeks to help them take advantage of these opportunities so that they can benefit from digital transformation and create more jobs and international careers.

The European Commission estimates that between 2014 and 2020, at least 8,000 cultural organizations and 300,000 artists, cultural professionals and their works could receive cross-border support and gain the experience that will allow them to develop international careers. The programme will also provide support for the translation of more than 5,500 books and other literary works.

MEDIA has a budgetary provision of 55% of these EUR 1,800 million, according to the proposed text. If approved, it would mean an action budget from 2014 to 2020 of EUR 990 million. MEDIA will provide support for the global distribution of over

1,000 European films via traditional and digital platforms, it will also provide funding for audiovisual professionals to allow them to have access to international markets and stimulate the development of films and other audiovisual works with potential for cross-border circulation.

There is much work to be done: thanks in part to the support of MEDIA, the proportion of European films among new film releases rose from 36% in 1989 to 54% in 2009. The Europa Cinemas network, which includes more than 2,000 screens in most independent cinemas, helps to ensure a wide variety of films for audiences in 475 cities. The films attracted 59 million viewers in 2009 compared to 30 million in 2000.

Creative Europe will be open to Member States and the countries of the EFTA (European Free Trade Association: Iceland, Liechtenstein, Norway and Switzerland), member countries and EU candidates, potential candidates and neighboring countries. Other countries could be included in specific actions. Currently, the member states of the EU, the EFTA countries, Croatia, Turkey, Macedonia, Serbia, Montenegro and Bosnia and Herzegovina are participating in the Culture Programme. The EU Member States, Croatia, Iceland, Liechtenstein, Norway and Switzerland are participating in the MEDIA Programme.

CONCLUSIONS

ROUGHLY 90% OF THOSE SURVEYED STATE THAT THE MEDIA GRANTS HAVE STRENGTHENED THEIR PROJECTS, TO THE EXTENT THAT MANY WOULD NOT HAVE BEEN POSSIBLE WITHOUT IT.

Receiving the MEDIA grant represents a key element of support within the industry's various fields –from producers seeking to obtain funding, to distributors, festival exhibitors and organisers– when striving to ensure a quality European programme, bearing little relation to the more commercial listings. Over 90% of the professionals surveyed state that the grant has strengthened their projects, to the extent that many would not have been possible without it.

OVER HALF OF THOSE POLLED STATE THAT MEDIA HAS HELPED THEM CONSOLIDATE THEIR BUSINESS, WHILE HALF AGREE THAT IT HAS HELPED THEM KEEP THEIR JOBS

Some 70% of those polled share the idea that MEDIA support can help consolidate a business, especially in the country's current crisis situation, and particularly in the audiovisual sector. Receiving

MEDIA support cannot only help consolidate a business, but can incentivise the creation of new jobs. Half of those surveyed state that the MEDIA grant has helped their companies to preserve jobs.

FOR THOSE SURVEYED, ATTENDING TRAINING COURSES AND NETWORKING MEETINGS HAS BECOME A MEANS TO ENHANCE THEIR KNOWLEDGE AND BUSINESS AND INTRODUCE THEM TO NEW PARTNERS AND COLLABORATORS.

The Catalan professionals surveyed have attended few training courses financed by MEDIA. Nevertheless, those that have believe it has enabled them to broaden their knowledge (95 %), increased their business (57.9 %) and given them the chance to finally meet partners they had already worked with (63.3 %)

Networking meetings have helped those polled to improve their position with regards to buyers and investors (77.2 %), «to become less invisible» and to meet partners for future collaborations (94.3 %).



FOUR AND A HALF FRIENDS (MEDIA DEVELOPMENT & MEDIA TV BROADCASTING)

THE ANTENA SERVICE IS VERY EFFICIENT AND DRAWS COMPANIES CLOSER TO EUROPE

Antena's role by no means goes unnoticed among the professionals surveyed: almost 90% of those surveyed believe that the MEDIA Antena Catalunya service is very efficient or efficient, and agree that it is vital in order for the Catalonian audiovisual industry to «get closer to Europe». Furthermore, Antena's bespoke service is important to them when presenting their applications.

THE MEDIA GRANT FOR DEVELOPMENT APPEARS AS THE MAIN BOOSTER ON THE INTERNATIONAL MARKET, AS WELL AS HAVING ESTABLISHED BOTH DOCUMENTARIES AND FICTION IN THE INDUSTRY

The majority of producers believe that the support from the MEDIA programme in terms of development has helped them to promote their project on the international market, to generate trust among their partners and collaborators and to find other sources of funding. The producers themselves consider that, for them, the MEDIA grant could be decisive when it comes to collaborating in a project as regards the guarantees it can generate.

The genres that most benefit from the MEDIA grants for development are documentaries and fiction. And in 80% of these cases, it is considered that the MEDIA brand helps consolidate the genre within the industry.

I2I AUDIOVISUAL IS THE GRANT WITH THE MOST POSITIVE ASSESSMENT, AND IS USED SPECIFICALLY TO REDUCE RISK AND COMPLETE THE FINANCIAL SPENDING INVOLVED

One of the most popular grants within the MEDIA programme in Catalonia - which, in the past decade, has received almost 50% of the grants of this kind awarded all over the country - is i2i Audiovisual. Catalonian beneficiaries rate it very highly: 72.8% considered it to be very efficient or efficient, and almost 70% believe it helped them maximise their project's international potential.

Roughly 90% of those surveyed that received the grant did so for fiction projects although, funnily enough, the majority believe that documentaries are the hardest genre to finance, followed by fiction. All 100% of those surveyed were beneficiaries of the financing expenditure module, which they consider to be of huge importance as it has allowed them to «reduce the economic risk» of their companies and, in some cases, to «complete their financial spending».

DISTRIBUTORS AND EXHIBITORS BELIEVE THAT A FUTURE WITHOUT MEDIA WOULD CAUSE THEM FINANCIAL PROBLEMS AND CONSERVATIVE ACQUISITION POLICIES, TO THE DETRIMENT OF THE EUROPEAN AUDIOVISUAL INDUSTRY

As regards distributors and exhibitors, over 70% consider the MEDIA grant to have been effective in the acquisition and programming, respectively, of non-national European films that would otherwise not have been possible. In both cases there is a general feeling that a future without the MEDIA programme would inevitably lead to «financial problems», «conservative acquisition policies» and a situation in which «the European film industry would be the main victim».

NETWORKING EVENTS WITH MEDIA SUPPORT HAVE ENABLED MANY PROJECTS TO PROGRESS TOWARDS INTERNATIONAL PRODUCTION AND/OR DISTRIBUTION

In the same way that many professionals from the sector believe that the networking activities offered by MEDIA help them to «become part» of the industry, 80 % of the professionals surveyed who received the programme's support in promoting and accessing markets believe that the aid was very efficient in terms of organising activities in which professionals from the Catalonian audiovisual industry were able to interact with other, international professionals. Generally, those surveyed consider that aid for this type of events has enabled many projects to progress towards production or to achieve distribution on an international scale.

THE VOD MEDIA AND DIGITAL DISTRIBUTION GRANT HAVE BEEN FULLY EFFECTIVE AT INCENTIVISING NEW TECHNOLOGY, CREATING NEW AUDIENCES AND IMPROVING THE DISSEMINATION OF EUROPEAN FILMS

A fairly recent line of aid is that aimed at Video on Demand and digital film distribution. At a time when the sector is threatened by piracy and changes in viewer consumption models, the MEDIA programme seeks to support the creation and use of catalogues for European works in digital format and businesses adapted to the new technological developments.

In this sense, the Catalanian professionals surveyed in this field believe that the MEDIA grants have been 100% effective at incentivising VoD and using new technologies to create new audiences, as well as enabling the dissemination of European productions that would otherwise only have been shown within Spanish territory.

THE CATALONIAN AUDIOVISUAL HAS A VERY POSITIVE PERCEPTION OF THE MEDIA PROGRAMME

The perception of the MEDIA programme within the Catalanian audiovisual industry is very positive, not only in terms of its financial contribution and the strengthening of projects and businesses that would otherwise be subject to very conservative policies, but also because it is considered an «essential platform for the mere existence of a European audiovisual industry».



RUDY THE CLOUD BOY (MEDIA DEVELOPMENT)

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Download the full report of the Catalonia's MEDIA Programme funding recipients here:
http://www.antenamediacat.eu/comunicacio/guies_media



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