

## Collaborative Ideas for Shaping Change: EFM Think Tanks Report 2022

### Introduction

The European Film Market (EFM), the business platform of the Berlin International Film Festival, held three invitation-only Think Tanks during its digital edition in February 2022. Industry experts, stakeholders and professionals were invited from around the globe to reflect and brainstorm about three highly topical areas of reflection for the international film ecosystem today.

The overarching theme of the EFM Industry Sessions 2022 was Shaping Change. Each of the three Think Tanks took a more specific look at the changes impacting various sectors of the film and TV industries.

The intimate, closed-door discussions concentrated on several key topics: the future of the film ecosystem, changes in distribution and changes in production.

The EFM was happy to welcome a very international and diverse body of creatives and professionals working across the value chain to discuss these topics in highly focused, working-session formats, which included breakout rooms addressing a specific topic within each Think Tank. All participants were assured a safe space – without being named or quoted directly – to share their experiences and ideas for best steps forward.

## THINK TANK 1

### Shaping the Future of the Film Ecosystem

Zeroing in on the overarching theme of Shaping Change, the “Shaping the Future of the Film Ecosystem” Think Tank gave space for experts across production, distribution, technology, and social sustainability to debate the present state of the industry, and to imagine solutions for a better future. Participants focused on four relevant topics: technology trends and limitations in production; building sustainable production companies; implementing best practices for mental health; and equitising the industry for those living with disabilities.

#### BREAKOUT 1: Technology in Production

With the constantly innovating nature of production, especially during the pandemic when sets were forced to completely rethink protocols and workflows, significant changes have taken place. **Technology** finds itself at the center of these shifts. **Challenges** include the fact that learning new technology and its applications requires education and experience; creativity can be stalled by data-learning; there can be over reliance on data; data interpretation and analysis requires proper training; and the film industry is slower to adapt to new technology compared to the gaming and music industries.

**Opportunities** around **technology** and **production** include: The pandemic has advanced and revolutionised certain innovations like virtual production and metadata workflows; data allows producers to better understand audiences; collaborative tools have sped up workflows; tech has allowed for greener, more sustainable processes; and there is much opportunity still to be explored in innovations like blockchain and audience measurement tools.

#### **Technology and production, steps forward:**

- Continue with standardisation of innovations like virtual production and storyboarding; AI; XR; and stereoscopic and volumetric filmmaking
- Consider opportunities and the potential of distribution evolutions like blockchain
- Foster and encourage education around new technologies and allow time for implementation
- Use AI to set benchmarks for measuring audiences
- Provide proper training of data analysis and interpretation
- Use data to better address audiences (but without shaping content based on data alone)
- Lean into the greener, more sustainable processes provided by new tech
- Think of distribution strategies from the starting point of production

#### BREAKOUT 2: Sustainability & Production

Looking at sustainable strategies for the future of production companies, **challenges** identified include: the constantly shifting production and distribution landscape; difficulties to plan ahead in a changing environment and especially for smaller companies; “bigger picture” thinking for larger companies can lead to less focus on creativity; the glut of annual industry events means it is impossible to attend all; and larger tech companies and streamers now drive the industry, leaving smaller companies behind.

**Opportunities** identified around **sustainable strategies** include: growth of peer-to-peer support networks and groups for producers; more time for strategic thinking; using more, possibly new tools available for production planning and strategy; and digitisation to streamline processes and workflows.

### **Sustainable production businesses, steps forward:**

- Decentralise concentration of power in media to allow for fairer competition
- Allow time for adequate business planning and strategy
- Focus on vision, positioning, and nurturing individual projects, not only exponential company growth
- Build peer alliances and an ecosystem of common interests and values to grow together, and use technology to assist
- Be agile and willing to adapt to new tech because the landscape will always be changing
- Rely on expert legal and business advice
- Self-assess, appreciate different levels of ambition and everyone's personal journey

### BREAKOUT 3: Mental Health (co-organised with Locarno Pro)

In exploring **better practices** addressing **mental health, challenges** identified include: lack of gender equity in addressing these issues; the freelance nature of the industry provides lack of; still a lack of training, awareness, and support on mental health issues; and systemic issues of financial insecurity and bullying are still problematic.

**Opportunities** identified for impacting better **mental health** include: build on the new consciousness around these issues; younger generations are less willing to work in unhealthy environments and more open to talking about mental health; peer-to-peer support groups and affordable counseling have become more common; and we are seeing more structural implementations like codes of conduct for companies and productions.

### **Improved mental health practices, steps forward:**

- Destigmatise thinking on "mental health", instead focus on "mental fitness"
- Implement more gender-balanced crews and companies to help change the modus operandi and encourage more responsibility for all
- Train people on how to negotiate fairly to discourage exploitation, end unpaid internships and other unpaid work
- Provide access to more affordable therapy/coaching
- More data and transparency is needed to access the situation and solve issues on a structural level
- Provide creatives with a universal basic income
- Foster more access to mental health education and more discussion and awareness (including within storytelling)
- Encourage employees to create personal development plans

### BREAKOUT 4: Accessibility (co-organised with the BFI)

Addressing improved **accessibility** on screen and off, **challenges** include: the core lack of understanding of ableism<sup>1</sup> prohibits the industry's ability to properly address issues at systemic, organisational and institutional levels; a general lack of awareness of disabled people's experiences; Covid has increased barriers to arts

---

<sup>1</sup> Ableism characterizes people as defined by their disabilities and inferior to the non-disabled. On this basis, people are assigned or denied certain perceived abilities, skills, or character orientations.

accessibility; industry standards of long hours and barriers to entry are problematic; and there's still a lack of representation in production at cast and crew levels.

**Opportunities** identified for **equitising accessibility** included: film schools have become critical thinking spaces for addressing accessibility and informing future leaders; the pandemic reiterated that arts access is a basic right; and other marginalised populations like queer and BIPOC communities have assisted intersectional understandings of issues that disabled people face.

### **Improving accessibility, steps forward:**

- Provide access features to all films, not just for content where the topic is disability
- Continue standardisation of hybrid events, maintain online accessibility, and include functions like live and closed captioning, sign language translation, and image descriptions
- Make significant efforts to reintegrate disabled people post-pandemic
- Improve dialogue and networking between disabled filmmakers and policymakers to better understand best practices
- Implement more policies at government and institutional levels to enable equal access to information for disabled people, like China's regulation on accessible internet platforms and the BFI's policy interventions informed by disabled people's lived experiences

## THINK TANK 2

### Shaping Distribution: EcoStability, Blockchain & Hybrid Audiences

The Shaping Distribution Think Tank examined many issues related to distribution, including how to make the sector more welcoming to new entrants and build sustainable companies; how blockchain technologies can be best used to connect distribution with other stakeholders; the changing audience of today and how hybrid events can reach them, as well as how festivals can evolve in the future to best reach audiences.

#### BREAKOUT 1: Accessing the Industry & EcoStability (co-organised with Locarno Pro)

There are a number of **challenges** to new entrants accessing the sales and distribution industries, including the fact that young people are at the most fragile point in their careers and the most vulnerable to be subjected to unhealthy working models or professionally abusive relationships. New entrants to the distribution industry will often also feel economically unstable. This in turn also contributes to an unbalanced industry, where people from wealthy backgrounds are the only ones who can 'afford' to do unpaid internships or traineeships. Often film distribution and festival employees don't have access to human resources departments, which means employees may not have a place to turn for assistance on employment issues. The culture of the film industry means many people's nights, weekends or holidays are interrupted by work.

The **opportunities** for improving workplace culture include recruiting inclusive new employees who more closely resemble societies and audiences; creating more sustainable businesses for the long term, and helping workers feel like they have a clear path to career progression. There is also an opportunity to share more information amongst industry experts to strengthen everyone's knowledge and ideas for best practices, and to feel more connected and not lonely in our positions.

#### **Accessing the Industry and EcoStability, steps forward:**

- Foster spaces and communities for the industry to collaborate on problems, solutions and best practices. Smaller organisations could band together to offer human resources support
- Endeavor to employ people on year-round, not temporary contracts
- Abolish the culture of non-paid internships, traineeships and entry-level jobs for new graduates and young professionals; just because it's a 'glamorous' industry to work in should not mean people work for free. To foster this type of change, consider it a condition of a company or festival's public funding that they can't hire unpaid workers.
- Companies and organisations should set and share policies related to working hours and not contact employees outside of normal working hours (including weekends) and especially not on their holidays, which are vital to recharge.
- Foster trade unions to help film industry workers
- Be more transparent about pay scales across the industry
- Career development plans and necessary training should be discussed at all stages of careers, from entry level to senior
- Festival programmers and distribution buyers and executives are under pressure to watch more and more hours of content every year. Solutions are needed, for example hiring enough people to share a manageable workload.

## BREAKOUT 2: The Real Impact of Blockchain on Distribution

The **challenges** of adopting blockchain technologies include that many film industry players don't fully understand blockchain, and may also be resistant to change former practices that have unfairly benefitted them for decades in regard to revenues and royalties. New business models are evolving at a rapid rate that can be hard to keep track of, even more so after the pandemic. There is currently a lack of distribution data being shared freely, even with stakeholders.

Experts also identified many **opportunities** if blockchain is used more widely, enabling distribution to be more transparent, and making authentic data sharing easier and available to all parties. Analytics and revenue will be brought into the same ecosystem. Blockchain can also offer efficiencies in workflows (and even cut costs) across the value chain that can benefit all stakeholders and put everyone from production to distribution on more equal footing. Blockchain can allow better market intelligence and therefore more informed decision making. Automated processes can be introduced so that all stakeholders can have their needs and objectives met. Blockchain can offer an improved way to monitor and understand more fractured audiences. Blockchain also has the power to eliminate the question of 'who you can trust' – all information is transparent. And such technologies can help companies capture data related to Environmental, Social and Governance (ESG) goals. Blockchain can enable smarter co-productions across the world, especially in emerging markets.

### **The Real Impact of Blockchain on Distribution, steps forward:**

- Blockchain needs to be integrated across the value chain; for example involving all possible distribution channels including TV, theatrical and VOD platforms
- Major financing institutions – such as public funders – need to embrace blockchain
- Be clearer about chain of title and share this with all stakeholders
- Let audiences become part of the chain as some of them want to support the artists and creators directly
- Talents can play a greater role, as they're involved in the equity of a film they can put pressure on stakeholders for more transparency
- Explore how the film industry can offer Non-Fungible Tokens (NFTs), which can foster community engagement and the monetization of creative work

## BREAKOUT 3: Hybrid Audiences and the Role of Festivals in the New Distribution Landscape

Some of the **challenges** are obvious. As with other forms of distribution, film festivals are going through turbulent times with pandemic uncertainties as well as the rise of the streamers. Digitisation was already impacting festivals and has only been exacerbated in the last two years. Festivals might not clearly understand their place in this hybrid world, and might feel out of touch with changes in audience behaviour. It's also a challenge that there is no one standard model of a hybrid event, there are many different models for the filmmakers and audiences to comprehend and navigate.

With such seismic change also comes **opportunities**. The festival shifts due to the pandemic can represent a great window of opportunity. Physical festivals usually attract cinephiles and industry experts; online festivals can help to distribute art-house cinema to a larger and more diverse audience (and for a longer period of time than a traditional physical-only festival of just a few days). Festivals now offer more than just film screenings and are a bigger part of the ecosystem and the film community. Hybrid festivals can have less of an adverse impact on the environment, and on an individual's stress levels from less travel. With online content booming, a festival's curated programme can be more appreciated than ever before; it can signal something special to the audience, even in a sea of streaming offerings. Festivals can serve audiences both in person who are craving physical events, but also tap into the convenience of watching films at home.



## **Hybrid Audiences, steps forward:**

- Curation is key and becoming even more essential; curation can be one factor in cutting through online fatigue
- Festivals should collaborate in different ways to help with visibility, within the festival world and within the wider industry
- Data can be used in new, forward-thinking ways for stronger audience engagement
- Consider that every film and every festival is different; the obligation is to meet the needs of that particular film and reach its bespoke audience
- Ensure online festival screenings feel like more than clicking on a link; beyond the film, consider talks, filmmaker Q&As, or other contextual offerings.



## THINK TANK 3

### Shaping Production: Equity, IP and Creating Alliances

This Think Tank looked at evolving approaches by producers, including how they are navigating the shifting landscape of intellectual property rights; independent producers joining forces to have strength in numbers; and how traditional funding needs to evolve to support the production of more inclusive voices and stories.

#### BREAKOUT 1: Intellectual Property (co-organised with European Producers Club)

**Challenges** include that with the rise of the streamers, especially the big global players, funding models have evolved past the traditional patchwork film finance to the chance for a streamer to greenlight a production in its entirety, but to demand all rights as part of that deal. This can be beneficial to producers in the short term as these deals can be lucrative, but they don't allow producers to build long-term sustainable businesses where they are building a library of their own intellectual property to continue to leverage in the future. Independent producers don't often feel like they are on equal footing when they are negotiating. Also, there is a lack of clarity amongst regulators in regards to the IP marketplace. The revised Audiovisual Media Services Directive (AVMSD) 2018 is being implemented across the European Union in different ways, leading to confusion. Producers might also experience being pulled in two directions: wanting creative control and rights for their creative projects, but also taking on production service jobs because they offer regular income. Public funders are at a crossroads, especially in regards to dealings with streamers.

Producers noted that some **opportunities** include that the streamers are starting to work on a case-by-case basis to offer more flexibility on IP deals. The European Producers Club's Code of Fair Practice, launched in spring 2021, has started the dialogue on a pan-European basis. Producers can band together to have more collective bargaining power (see next section). The more IP that producers can retain, the better their long-term prospects are for building a sustainable production company.

#### **Intellectual property, steps forward:**

- Push for government intervention and regulation to help independent producers hold onto IP rights. This should be regulated on a pan-European level.
- Creative talents can stand by producers more when negotiating deals, achieving greater bargaining power.
- Consider new models of financing for independent production companies, more corporate backing for overheads, and more equity funding of development so that companies are not only relying on IP rights to stay in business

#### BREAKOUT 2: Creating Alliances (co-organised with Berlinale Co-Production Market)

Producers identified **challenges** such as the struggle for true independents to survive and thrive against the might of media conglomerates and global brands. When mergers do happen, that can mean producers feel they are giving up their independence and their unique voices. Forming a successful alliance takes commitment and time from all parties. Joining forces can sometimes mean less personal flexibility.

Some alliances do offer great **opportunities**. The industry, especially in Europe, is seeing a lot of consolidation and mergers, which can help give producers strength in numbers and more bargaining power at the negotiating table. Allied producers trying to build a joint catalogue of IP rights can be in a stronger position. Producers who



join forces also have more financial resources to jointly acquire rights or make projects of scale and attract top talent.

Collaborators can learn how things are being done in different territories and grow from that. And collaborating can make producers feel less alone and help them to share knowledge and experience.

### **Creating Alliances, steps forward:**

- Alliances should help projects become more appealing to the international market and across national borders, while still maintaining their unique vision
- Smart alliances can help producers access different countries' support systems if producers are collaborating across borders
- Both feature and episodic work can still be funded in the traditional independent cinema way of a patchwork that allows producers to retain rights, compared to getting a full commission from one streamer. Public broadcasters and funders can still play an important role in a system like this.
- Not every independent producer will benefit from a collaborative structure or alliance, so for those who want to stay truly independent, they need better access to funding
- Independent voices should still be fostered even in more corporate structures and alliances

### BREAKOUT 3: Equity, Inclusive Financing Models

**Challenges** include dealing with the continued influence of historical racism, sexism, classism and colonialism on structures today that decides who gets to tell their story to the world. Data shows that films being made do not reflect the diversity of modern societies. There is momentum for change in society and also in the film business, representing new **opportunities**. New funding initiatives like New Dawn and Cypher Cinema or established funds like Ford Foundation have put the principles of inclusion at their core, and are designed to meet the needs of marginalised filmmakers. An inclusive industry will be more attractive to audiences, fueling the value chain. Equity can be considered a more foundational value and a measure of success.

### **Equity, Inclusive Financing Models, steps forward:**

- Even for filmmakers who are rejected for the funding scheme they apply for, offer them some kind of support, so that nobody is left behind
- Policymakers can protect European content; culture should not be privatised
- Rethink how success is measured, not just in terms of box office or winning a top international film festival, success could instead be measured by social and cultural impact, or talent/career development.
- Keep pushing so that the film industry's makeup resembles the demographics of any society
- Rethink what quality means, ensure biases are removed when determining quality, and question who are the gatekeepers
- Film funds need to create a more diverse ecosystem and be more diverse with their own hiring; Gatekeepers should regularly rotate out of their positions
- Take the burden away from filmmakers to hit certain goals
- Question existing funding bodies' eligibility criteria and make applications less dependent on too much paperwork
- Try new funding structures and learn from these successes and mistakes.
- Gatekeepers need to widen the circles of people they engage with
- Realise this investment will take time, it's not a one-year fix, it could be 10 years before we see systemic change
- Have more trust in the filmmakers

## CONCLUSION

EFM recognizes there are no quick fixes for these ongoing, complex topics, but hopes the ideas discussed within the 2022 Think Tanks will inspire deeper conversations and collaborations, and lead to measurable actions.

EFM welcomes feedback on the ideas in this document; please contact the EFM Industry Sessions team at [efm-industrysessions@berlinale.de](mailto:efm-industrysessions@berlinale.de)

### Credits and Acknowledgements

**EFM Director:** Dennis Ruh

**EFM Think Tanks 2022 Staff:** Themba Bhebhe, Manu Guddait, Jana Kodadova, Faysal Omer, Jana Wolff

**Report Authors:** Wendy Mitchell and Andrew Houchens

**Global Moderators:** AC Coppens, Marcin J. Sobczak

**Curation consultants:** Manuel Badel, Martina Bleis, AC Coppens, Markus Duffner, Alexandra Lebret

**Breakout room facilitators:** Sadia Belhadi, Babette Dieu, Clara Föhres, Jana Kodadova, Elisabeth Safiullin

**Moderators and note-takers:** Pedro Affonso Ivo Franco, Manuel Badel, Martina Baumgartner, Themba Bhebhe, Ali Charmi, Anna Desponds, Peter Effenberg, Alison Gardner, Manu Guddait, Diego Hangartner, Andrew Miller, Katia Morales Gaitan, Brigid O'Shea, Marcin J. Sobczak

**Co-organising partners:** British Film Institute, Locarno Pro

**Shaping the Future of the Film Ecosystem & Shaping Production: Equity, IP and Creating Alliances** were presented by



*The views and opinions expressed are those of the speakers and do not reflect or represent the official policy or position of Creative Europe MEDIA or DG CNECT.*

The EFM wishes to say a special thank you to all participants of the 2022 Think Tanks.

### Imprint

**Berlin International Film Festival**

**EUROPEAN FILM MARKET**

Potsdamer Platz 11

10785 Berlin

Germany

phone: +49 30 259 20 666

[efm@berlinale.de](mailto:efm@berlinale.de)