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Evaluation 2021

Strategic Report on the SDC's Film Promotion

Strategic Report on the SDC's Film Promotion

On behalf of the Swiss Agency for Development and Cooperation SDC, Global Cooperation / Knowledge-Learning Division, Culture and Development Team

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Management Response

Strategic Report on the SDC's Film Promotion

1. Introduction

The Swiss Agency for Development and Cooperation (SDC) promotes cultural rights through its "Culture and Development" policy. It focuses on intercultural principles and sensitivity in all SDC operations, as well as on promoting creativity and access to art and culture. The SDC's policy is a contribution to the implementation of the UNESCO Convention 2005 on the Protection and Promotion of the Diversity of Cultural Expressions, which Switzerland signed in 2008. This commitment includes the SDC's cooperation with cultural institutions in Switzerland with the aim of facilitating access to the Swiss and international cultural market for artists from Latin America, Africa, Asia and Eastern Europe. It contributes to the strengthening of an independent and dynamic cultural sector in the countries of origin and to global diversification in art, culture and social debate.

This strategic report on the SDC's Film Promotion has been realized by the independent consortium evalure/Interface and is the result of an evaluation of the SDC's film promotion activities. It examines the SDC's overall film promotion portfolio – currently seven partnerships - in the light of current trends and future developments. To that end, it takes into account the seven individual evaluations of the SDC's partnerships in the film sector that were carried out beforehand. These are, on the one hand, evaluations of Trigon-film, Open Doors Locarno and the fund VisionsSudEst¹ (which has been part of this mandate). On the other hand, the report also looks at the evaluations already carried out for the mandate SüdKulturFonds², Visions du Réel Nyon, Filmfestival Fribourg and the Internationale Kurzfilmtage Winterthur³. This strategic report summarises and classifies all earlier results and asks numerous other experts from the film world for information, context and assessments that make it possible to address the strategically oriented questions. The report essentially pursues the following guiding questions:

- What changes already have or will have an impact in the or on the film industry?
- Does the current mix of the SDC's approaches in the film sector reflect changes and trends in view of the SDC's objectives?
- How can the changes in the film market be taken into account in the film portfolio?

This management response includes the SDC's assessment of the findings and recommendations of the final report and the subsequent planned measures.

2. Evaluation process

The independent consortium evalure/Interface conducted this analysis (in parallel with the evaluations of Trigon-film, Open Doors Locarno and VisionsSudEst included in this mandate from September 2020) and submitted the final report on 30 June 2021. For this analysis, the evaluation team took into account 7 existing evaluation reports - all of which had a qualitative and quantitative approach - on SDC film partnerships. In addition, the team conducted guided interviews with a total of 35 film and development professionals, filmmakers and SDC responsibles for an average of 90 minutes per interview. Questions on trends and developments have also been asked in online surveys of the previous evaluations: 184 filmmakers from S/E countries answered the corresponding questions in the online survey. Drawing on specialist literature, the evaluation team has sorted and condensed the findings and, on this broad basis, formulated recommendations for the future design of the SDC's film promotion.

3. Summary of the results

Situation in the countries of origin: The starting and reference point for all subsequent considerations is an overview of the specific problems faced by S/E filmmakers in their countries of origin. The information that has been analysed comes from interviews and from the online survey sent to S/E filmmakers. It is therefore not a complete picture, but it does give an impression of the problems that S/E filmmakers are struggling with. These include problems of local cultural policy such as instability of local

¹ All carried out in 2020 and 2021 in collaboration between Evalure, Zürich and Interface, Lucerne; Lausanne

² KEK-CDC Consultants Zurich and Kultureval, 2020.

³ All carried out in 2018 in collaboration between Evalure, Zurich and INTERFACE, Lucerne, Lausanne.

cultural funding and problematic allocation of local funding; structural problems such as problematic distribution in cinemas and on VoD platforms, lack of local audience, dependence on international co-production and post-production, or quality problems in local arthouse film production; economic problems of the local film scene such as too expensive platform participation, dependence on international funding, difficult access to technology and working tools; social problems such as censorship, poverty, or armed conflicts.

The SDC's partnerships: The SDC maintains partnerships with four festivals (Open Doors Locarno, Festival international de film de Fribourg, Visions du Réel Nyon, Internationale Kurzfilmtage Winterthur), one film distributor (trigon-film) and two funds (SüdKulturFonds and VisionsSudEst). Artlink has a mandate for the management of the SüdKulturFonds, all others submit projects to the SDC. They all contribute, to varying degrees and in different ways, to one or more of the following 4 objectives: (1) enabling access to the Swiss public; (2) promoting access to international markets, via access to contacts and networking; (3) supporting the development of competences; (4) financing local production. In the estimation of the evaluation team, around 1/3 of the approximately CHF 1.991 million (calculation basis 2019) flows into supporting the access to the Swiss public, 1/3 into competence development and access to international markets, and 1/3 into the support for local production. In the point of view of the evaluation team, the SDC should define this distribution of funds as well as the objectives of the individual partnerships, more strongly in the context of its own strategy and work more with mandates (instead of on a project basis).

The film value chain: To better understand the complex film world, the evaluation team worked with the classic film value chain – although they are aware that this model will not be able to survive in the future due to the increasing digitalization. Through its Swiss partnerships, the SDC intervenes at many stages of the value chain: competence development (festivals, OD) > project development support (VSE, OD) > contact with funders (various festivals, OD) > production support (VSE) > Swiss premieres (OD, Visions du Réel) > 'International' (Swiss) distribution (trigon-film, various festivals). However, some are not covered: access to education, access to local/regional funding, local distribution and exploitation. In addition, there is a lack of a coordination strategy at partnership level which ensures that projects are supported all along the value chain.

The impact of the work of the SDC partners. Based on the previous evaluations, the evaluation team has displayed the impact of the individual partnerships on filmmakers and in their countries of origin.

Trends and developments in the film sector. The evaluation team has localised and described the following trends in the film industry in conversation with experts: (1) development of digital aspects and streaming (diversity of content and formats, a tax on platforms to boost local production, mainstream yes, but not only); (2) existential crisis for cinemas (from big screen to small screen, reduction of the number of cinemas, changing role in the value chain, large number of films and high communication costs, ageing arthouse-film audience in the Western context); (3) increased access to knowledge and technology (availability of knowledge, availability of production technology, easier access to festivals); (4) changing geographical hierarchies (reduced dependencies, new audiences and new content, Asia and Africa gaining in importance); (5) new funding models (lower costs, new funders and new audiences, local taxes, ad-supported extends to film, crowdfunding for film, overproduction of films); (6) an arthouse cinema under perfusion (privileged global content, arthouse cinema as museum).

Global trends. The evaluation team goes on to describe some global developments that also influence the film scene: (1) the acceleration of the digital revolution; (2) environmental challenges; (3) increased importance of diversity management; (4) the question of mobility.

Opportunities and risks for the SDC partners and S/E filmmakers. All these developments naturally not only influence the film industry as a whole, but also the current SDC partners. These developments offer both opportunities and risks for the festivals, the funds and the film distribution. The evaluation team assumes that they will all continue to be important players in the (Swiss) film scene, although roles will shift and the offers will probably be more permeable and less specialised. For S/E filmmakers, too, the developments contain risks and opportunities. Opportunities are offered in particular in the areas of

training, film production and distribution. A good internet access is crucial for S/E filmmakers to be able to take advantage of these opportunities.

5 scenarios for the development of the film industry on the horizon of 2030. Based on the trends and developments that are already manifesting themselves to varying degrees today, the evaluation team has dared to take a look at the year 2030 and have drawn up 5 scenarios, each of which revolves around a central theme. Scenario 1: Democratisation of production; Scenario 2: Coexistence of cinema and VoD; Scenario 3: Change management for festivals; Scenario 4: The role of new audiences; Scenario 5: Widening gaps.

The SDC's objectives. With its cultural commitment, the SDC has overarching objectives. It also formulates objectives specifically for film promotion and for film partnerships. To that end, it uses a comparable matrix of objectives (output, indicators, outcomes, impact) in all contracts. The evaluation team analysed this complex system taking into account the trends and scenarios identified. The overarching objectives and the outcome objectives can remain in our opinion, but there are some additions and improvements: Our recommendations concern, for example, the inclusion of local dimensions in the formulation of objectives for the Swiss partners; the evaluation team suggests giving even more weight to the visibility of S/E filmmaking, as well as always considering digitization at all levels (selection of partners, definition of objectives, output). In sum, the evaluation team finds that it is acceptable and has advantages to continue the current practice of cooperation. Nevertheless, the evaluation team suggest thinking about opening the circle of partners and about specifying the mutual expectations.

Possible measures. Against the background of the identified trends and in the light of the five scenarios, not only the objectives but also the measures need to be adapted. The evaluation team has put together a series of possible measures that could be tested and their implementation monitored. All of them aim to strengthen the actors of the local S/E film industries - directly or indirectly via Swiss partners. The evaluation team also suggests operating with a country strategy rather than using the DAC country categories. The evaluation team also proposes to increasingly promote partnership-based initiatives and new forms of local, regional or international cooperation in the future. In the sense of a broad-based, diverse and innovative engagement of the SDC, it would be important that beyond the existing partners, further Swiss organisations are given an incentive to get involved in favour of S/E film scenes and S/E filmmakers.

Recommendations. For the further procedure, the evaluation team proposes a strategy development process that allows (new) priorities to be set. It can start with the trends, scenarios and recommendations elaborated in this strategic report and should be conducted in a circle of experts that goes beyond the existing cooperation partners and strongly involves S/E experts.

4. Assessment of the report's findings and recommendations

The SDC will take into account the identified trends and possible changes in the film landscape and the related impact on the SDC's cultural engagement in Switzerland in its future strategic considerations - with a special attention to innovation and digitization and its impact on the entire value chain and mobility of artists. In the following chapter 4, the SDC gives its assessment of the specific recommendations and determines the measures to be taken.

5. Key elements of the Management Response:

Overview of recommendations and measures

The objectives of the SDC partnerships in the cultural sector - considerations and recommendations for adjustments			
	einverstanden	Teilw. einverstanden	Nicht einverstanden
<p>The impact objectives of the SDC film partnerships <i>With regard to its film policy, the SDC mentions in the contracts with its partners the effects to be achieved in the countries of the South and East. The work of the individual partners should:</i></p> <ul style="list-style-type: none"> • <i>Contribute to the strengthening of independent voices and independent works</i> • <i>Contribute to the strengthening of local competences for artistic creation and education.</i> • <i>Contribute to strengthening the role of filmmakers in discussions and processes relevant to civil society.</i> • <i>Contribute to strengthening the further development of the independent film sector.</i> <p>Recommendation 1: We recommend that in future the impact objectives be taken into account in the formulation of the objectives of SDC partnerships.</p>			<p>The strategic report confirmed the relevance of these goals at the impact level, also with regard to trends and possible changes in the film landscape. Specific results at this level have been shown in past evaluations.</p> <p>The impact level objectives are part of the contract and will be discussed in depth with partners of the cultural programme. In particular, it should be determined with which activities the respective project/activity can make a possible contribution to which goals at the impact level.</p> <p>The SDC's key requirement for partners, the aim of "promoting access for artists to the Swiss and international cultural market, to networks and to audiences" in accordance with the UNESCO Convention 2005, will be maintained in the short and medium term. This will be done by taking into account trends (especially digitalisation and mobility) as well as possible changes in the film landscape. Effects and changes in the countries of origin also have to be taken constantly into consideration.</p> <p>Measures: The contribution of the projects/activities to the Impact goals of the SDC's cultural programme in Switzerland must be explicitly stated in the project documents.</p>
<p><i>The SDC formulates two key requirements for current film partnerships:</i></p> <ol style="list-style-type: none"> 1. <i>Art and culture professionals from the South and East gain easier access to the Swiss cultural market and international networks.</i> 2. <i>Access to Swiss (and international) audiences is promoted, especially for cultural expressions that reflect social and developmental content.</i> <p>Recommendation 2: We recommend omitting the prioritisation of content in objective 2 in the future. The SDC can easily dispense with it in future, as it is rightly not practised anyway.</p>	einverstanden	Teilw. einverstanden	Nicht einverstanden
			<p>The orientation of the SDC's cultural engagement, defined in 2010, aims to promote filmmakers from the South and East. By participating in festivals in Switzerland and presenting their works, filmmakers are also given the opportunity to present their views in an international context. In any case, their films often reflect local and global themes and thus convey them to the audience in an artistic way. The selection of the films is based on artistic criteria and is the responsibility of the partners.</p> <p>Measures: The objective two shall in future be limited exclusively to access to the Swiss (and international) audience, the prioritisation of content will be omitted.</p>

<p>Recommendation 3: We recommend formulating a third access objective that encourages SDC partners to use their work to also promote S/E filmmakers' access to the local and regional scene, i.e. to their actors, their networks and their audiences.</p>	<input type="button" value="einverstanden"/> <input type="button" value="Teilw. einverstanden"/> <input type="button" value="Nicht einverstanden"/>
	<p>The promotion of access to local and regional networks is very much welcomed by the SDC in principle and some of the current Cultural Partners in Switzerland are already contributing to this goal.</p> <p>However, the systematic implementation of this objective is considered difficult, as it requires longer-term commitments with a focus on a specific region/country.</p> <p>The objective of access for filmmakers should therefore remain in its general formulation in the context of the SDC's cultural programme in Switzerland.</p> <p>In general, the Culture and Development team can act as a bridge to the field offices. However, depending on the context, these have different priorities in supporting cultural projects, but can play a role in providing contacts and information on the country's context.</p> <p>Measures: none</p>
<p>Recommendation 4: We recommend that enabling the production of films be formulated as a separate objective. This would give the artistic work of S/E filmmakers a central place in the SDC's funding structure.</p>	<input type="button" value="einverstanden"/> <input type="button" value="Teilw. einverstanden"/> <input type="button" value="Nicht einverstanden"/>
<p>agreed</p> <p>Measures: Enabling the production of the films shall be included in the objectives at outcome level.</p>	
<p>Further recommendations on adjustments to the SDC's film portfolio guidelines</p>	
<p>Recommendation 5: We recommend that digitization be integrated on all levels in the future: in the selection of the SDC partners, in formulating of the objectives of the cooperation, and also in formulating the outcome and output objectives.</p>	<input type="button" value="einverstanden"/> <input type="button" value="Teilw. einverstanden"/> <input type="button" value="Nicht einverstanden"/>
<p>agreed</p> <p>Measures: Digitization will be integrated on all levels: in the selection of the SDC partners, in formulating of the objectives of the cooperation, and also in formulating the outcome and output objectives. The Monitoring-Matrix will be adapted accordingly.</p>	
<p>Recommendation 6: We recommend that in future greater importance shall be attached to the factor of international visibility for S/E filmmaking. This is recommended both for the selection of partnerships and for the definition of objectives for the respective cooperation.</p>	<input type="button" value="einverstanden"/> <input type="button" value="Teilw. einverstanden"/> <input type="button" value="Nicht einverstanden"/>
<p>agreed</p> <p>Measures: The international visibility of S/O filmmakers shall be given even greater importance and shall be reflected accordingly in the partnerships.</p>	

<p>Recommendation 7: We recommend adding “project financing” to the term “generate income” when naming outcome objective 3.</p> <p><i>Outcome objective 3 formulates: “the filmmakers can generate an income”. However, project funds (such as the contributions from VSE) are not income for the filmmakers in the true sense of the word, as they flow exclusively into the realisation of projects.</i></p>	<table border="1" data-bbox="886 123 1432 460"> <tr> <td>einverstanden</td><td>Teilw. einverstanden</td><td>Nicht einverstanden</td></tr> <tr> <td colspan="3">agreed</td></tr> <tr> <td colspan="3"> <p>Measures: Outcome target 3 will be supplemented accordingly.</p> </td></tr> </table>	einverstanden	Teilw. einverstanden	Nicht einverstanden	agreed			<p>Measures: Outcome target 3 will be supplemented accordingly.</p>		
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<p>Will the current mix of approaches and partnerships reflect these trends and developments?</p> <p>Recommendation 8: All actors in the film industry think carefully about future developments, their impact on their activities and any overdue need for adaptation. We recommend that the SDC's future funding be aligned on a mandate strategy, specifying the objectives to be achieved, and relying less on the individual strategies of partner organisations (see 2.2.2.c).</p>	<table border="1" data-bbox="886 460 1432 1224"> <tr> <td>einverstanden</td><td>Teilw. einverstanden</td><td>Nicht einverstanden</td></tr> <tr> <td colspan="3"> <p>The SDC will continue to work with a number of long-term partnerships on a contribution basis. Ownership for the development of activities shall remain with the partners, in dialogue with the SDC. These activities in favour of filmmakers S/O must in principle be in line with the SDC's objectives and criteria and take into account the trends and changes in the film landscape. This is particularly relevant with regard to digitalisation and its impact on the entire value chain, as well as the mobility of artists.</p> <p>Measures: The SDC will review its objectives and criteria and complement them (e.g. digitalisation) as well as specify them more precisely (e.g. countries of the South and East/ SDC partner countries).</p> </td></tr> </table>	einverstanden	Teilw. einverstanden	Nicht einverstanden	<p>The SDC will continue to work with a number of long-term partnerships on a contribution basis. Ownership for the development of activities shall remain with the partners, in dialogue with the SDC. These activities in favour of filmmakers S/O must in principle be in line with the SDC's objectives and criteria and take into account the trends and changes in the film landscape. This is particularly relevant with regard to digitalisation and its impact on the entire value chain, as well as the mobility of artists.</p> <p>Measures: The SDC will review its objectives and criteria and complement them (e.g. digitalisation) as well as specify them more precisely (e.g. countries of the South and East/ SDC partner countries).</p>					
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<p>Recommendation 9: We recommend that other organisations be given the opportunity to apply for the respective mandates - and be motivated to apply. In this way, any territorial or monopoly thinking can be counteracted. Even with all the advantages of long-standing partnerships, it is also important, especially in a small country like Switzerland, to continuously integrate expertise and network of new partners.</p>	<table border="1" data-bbox="886 1224 1432 1763"> <tr> <td>einverstanden</td><td>Teilw. einverstanden</td><td>Nicht einverstanden</td></tr> <tr> <td colspan="3"> <p>In addition to direct long-term partnerships, the SDC's film portfolio shall be expanded to include pilot projects, especially innovative and experimental projects in the field of film for the promotion of S/O filmmakers. Support for such projects will be channeled through the Südkulturfonds.</p> <p>Measures: Support for innovative and experimental projects in the field of film for the promotion of S/O filmmakers will be channeled through the Südkulturfonds.</p> </td></tr> </table>	einverstanden	Teilw. einverstanden	Nicht einverstanden	<p>In addition to direct long-term partnerships, the SDC's film portfolio shall be expanded to include pilot projects, especially innovative and experimental projects in the field of film for the promotion of S/O filmmakers. Support for such projects will be channeled through the Südkulturfonds.</p> <p>Measures: Support for innovative and experimental projects in the field of film for the promotion of S/O filmmakers will be channeled through the Südkulturfonds.</p>					
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<p>Recommendation 10: We recommend that the SDC take note of the list of possible measures recommended in chapters 7.2 and 7.3 and to integrate them into its future strategic thinking.</p>	<table border="1" data-bbox="886 1763 1432 2025"> <tr> <td>einverstanden</td><td>Teilw. einverstanden</td><td>Nicht einverstanden</td></tr> <tr> <td colspan="3"> <p>agreed</p> <p>Measures: The SDC will include the possible measures in its future strategic considerations.</p> </td></tr> </table>	einverstanden	Teilw. einverstanden	Nicht einverstanden	<p>agreed</p> <p>Measures: The SDC will include the possible measures in its future strategic considerations.</p>					
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<p>Recommendation 11: We recommend that the SDC and its partners develop an approach based on a dual expertise: a perspective and understanding of local conditions, issues and content, and Swiss know-how for accessing audiences and thus the international market. This plurality of experiences and perspectives is essential in defining the strategies of the SDC and its partner organisations, as well as in the implementation of their measures (jury, experts, etc.).</p> <p>Recommendation 12: We recommend that the SDC require their partners to engage in a joint reflection on the coordination of their various measures, their role in the value chain and the impact on the filmmakers supported (see chapter 2.3.2.).</p>	<div style="display: flex; justify-content: space-around; border: 1px solid black; padding: 2px;"> einverstanden Teilw. einverstanden Nicht einverstanden </div> <p>The SDC welcomes this dual expertise approach, which is already being implemented by current partners in many respects.</p> <p>Measures: The approach of dual expertise shall be taken into account even more in the future and reflected by the partners in the respective project documents.</p>
<p>How should the identified trends and developments be considered regarding the SDC's film portfolio?</p>	
<p>Recommendation 13: The scenarios, trends and perspectives elaborated in this report can be the starting point for an intensive reflection on how best to support S/E filmmaking and re-defining a strategy with corresponding (new) priorities. We recommend that the SDC hold one or more strategy workshop(s) with at least half of the participants from S/E countries and representing different stages of the film value chain. Furthermore, in addition to the current SDC film partners, other international or Swiss film professionals should also be represented.</p>	<div style="display: flex; justify-content: space-around; border: 1px solid black; padding: 2px;"> einverstanden Teilw. einverstanden Nicht einverstanden </div> <p>In a first step, this will be considered internally at SDC and bilaterally with partners and other actors in the film sector. Subsequently, the further procedure will be determined.</p>
<p>Recommendation 14: Based on the results of these workshops, it will be necessary to assess to which extent the current focus and related financial commitments are still adequate. Indeed, within the framework of the current portfolio, according to chapter 2.2.3.d, the SDC invests about 1/3 of its support into access to the Swiss public, 1/3 into competence development and access to international markets, and 1/3 into the support for local production.</p>	<div style="display: flex; justify-content: space-around; border: 1px solid black; padding: 2px;"> einverstanden Teilw. einverstanden Nicht einverstanden </div> <p>In consideration of the SDC's internal fit-for-purpose process, which will have an impact on structure and strategy, these discussions will be postponed to a later date.</p>

Bern, January 2022

Rudi von Planta, Head of Culture and Development
 Barbara Aebischer, Programme Officer Culture and Development

Strategic Report on the SDC's Film Promotion

On behalf of the Swiss Agency for Development and Cooperation SDC, Global Cooperation / Knowledge-Learning Division, Culture and Development Team

Angelika Salvisberg and Murielle Perritaz

In collaboration with Anne-Catherine de Perrot (*Evalure*) and Vera Hertig (INTERFACE)

30.6.2021

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1. Summary of the evaluation assignment and results

1.1. Introduction and methodology

This report is the result of an evaluation of the SDC's film promotion activities. It examines the SDC's overall film promotion portfolio in the light of current trends and future developments. To that end, it takes into account the 7 individual evaluations of the SDC's partnerships in the film sector that were carried out beforehand. These are, on the one hand, evaluations of trigon-film, Open Doors Locarno and the fund visions sud est¹. On the other hand, the report also looks at the evaluations already carried out for the mandate SüdKulturFonds², Visions du Réel Nyon, Filmfestival Freiburg and the Internationale Kurzfilmtage Winterthur³. This report summarises and classifies all earlier results and asks numerous other experts from the film world for information, context and assessments that make it possible to address the strategically oriented question. The report essentially pursues the following guiding questions⁴:

- What changes already have or will have an impact in the or on the film industry?
- Does the current mix of the SDC's approaches in the film sector reflect changes and trends in view of the SDC's objectives?
- How can the changes in the film market be taken into account in the film portfolio?

To answer those questions reliably, one would have to be able to foresee the future of film, of the film market and of global developments. Of course, this is not something we can do and we do not want make the claim to conduct futurology.

Evaluation method - trend research. The commissioning organisation wants to strategically align its activities with its objectives. Since it works with several partner organisations and has performance agreements that run over several years, any changes or shifts require a longer lead time. Therefore, it is important for SDC to be aware of relevant changes as early as possible. With our mandate, we move in the very complex and broad field of trend research. In the current relevant literature, its potential, but also its limitations are being intensively discussed⁵ and especially its self-reliant use has been highlighted: "The trend as a form of environmental monitoring can be a useful tool for strategic navigation, expert use assumed. The key to this is a reflective, active and responsible use of trend statements"⁶.

¹ All carried out in 2020 and 2021 in collaboration between *Evalure*, Zurich and INTERFACE, Lucerne, Lausanne.

² KEK-CDC Consultants Zurich and kultureval, 2020.

³ All carried out in 2018 in collaboration between *Evalure*, Zurich and INTERFACE, Lucerne, Lausanne.

⁴ Terms of reference p. 8f.

⁵ Cf. a.o. J. Radkau: Geschichte der Zukunft. Munich, 2017; B. Gransche: Vorausschauendes Denken. Bielefeld 2015.

⁶ On the complexity of trend research: "Trend assumptions associated with a high degree of certainty create the ability to act: Because you think you know what will happen, you can act quickly, purposefully and with concentration...Trend assumptions interpret the ambiguous and reduce complexity. This helps in decision-making, planning and acting. But simplification, which is always choice, cannot be had without a selection risk" (translation by the authors of this report). Christian Neuhaus (2018): Der Trend als Werkzeug. Gebrauchs-anleitung für ein Instrument der strategischen Beobachtung. Zeitschrift für Zukunftsforschung. In: www.zeitschrift-zukunftsforchung.de.

When we make trend statements in the following, they are not based on our own statistical research, but rather on relevant specialist literature, but above all on intensive exchange with experts from all areas of the film value chain, i.e. from representatives of education, filmmakers, producers, distributors, journalists, festival directors; among them are people from the Western context, but also people from the countries of the South and East (abbreviated in the future as S/E). In conversation with them, we were able to identify trends and possible future developments on which the experts were essentially in agreement - even if they were described and weighted differently. In the interviews and conversations, we reflected together on the influence of those trends and developments on the entire film value chain and, of course, on what they mean or could mean for S/E filmmakers and the SDC's Swiss film partners, and indeed for the SDC's own funding objectives. In order to sharpen the identified trends, i.e. for the sake of their diagnostic and prognostic quality⁷, we have summarised the identified trends and developments in five scenarios, which we have in turn discussed with experts from the film sector regarding their plausibility.

The results of this part of the evaluation are - especially in view of the required self-conscious use of the trend statements - not exclusively recommendations for action, but in particular also recommendations to observe the mentioned developments over longer periods of time and to repeatedly check the suitability of the existing partnerships.

Evaluation method. We took into account 7 existing evaluation reports - all of which had a qualitative and quantitative approach - on SDC film partnerships. We conducted guided interviews with a total of 35 film and development professionals, filmmakers and SDC responsibles⁸ for an average of 90 minutes per interview. Questions on trends and developments have also been asked in online surveys of the previous evaluations:⁹ 184 filmmakers from S/E countries answered the corresponding questions in the online survey. Drawing on specialist literature, we have sorted and condensed the findings and, on this broad basis, formulated recommendations for the future design of the SDC's film promotion.

1.2. Summary of the results

This report is the result of an evaluation of the SDC's film promotion activities.

Objective of the evaluation and methodology. It examines the SDC's overall film promotion portfolio - it currently has 7 partnerships - in the light of current trends and future developments and aims to formulate strategic recommendations for the future direction of the SDC's film promotion policy. With this project we are entering the complex field of trend research. We interviewed 35 people about changes in the film industry, the relevant trends and developments: film and development experts, film directors, SDC responsibles. The 184 responses from filmmakers from S/E countries, who were consulted in an online questionnaire, are also included in the results.

Situation in the countries of origin. The starting and reference point for all subsequent considerations is an overview of the specific problems faced by S/E filmmakers in their countries of origin. The information we analysed comes from interviews and from the online survey sent to S/E filmmakers. It is therefore not a complete picture, but it does give an impression of the problems that S/E filmmakers

⁷ Reliable trend statements have the following dimensions: diagnostic quality (explicitness, concreteness, narrativity, empiricism, argumentation); prognostic quality (reflexion, argumentation, timing specification); effectiveness (relevance, informativity, concision). Cf. C. Neuhaus (s. above).

⁸ Interviews with S/E film experts; interviews with 12 Western and Swiss film and development experts; interviews with 14 persons which work for one of the evaluated SDC partner organisations: trigon-film, Locarno Open Doors, visions sud est; interviews with 3 persons from the SDC.

⁹ Trigon-film, visions sud est, Open Doors Locarno.

are struggling with. These include problems of local cultural policy such as instability of local cultural funding and problematic allocation of local funding; structural problems such as problematic distribution in cinemas and on VoD platforms, lack of local audience, dependence on international co-production and post-production, or quality problems in local arthouse film production; economic problems of the local film scene such as too expensive platform participation, dependence on international funding, difficult access to technology and working tools; social problems such as censorship, poverty, or armed conflicts.

The SDC's partnerships. The SDC maintains partnerships with four festivals (Open Doors Locarno, Festival international de film de Fribourg, Visions du Réel Nyon, Internationale Kurzfilmtage Winterthur), one film distributor (trigon-film) and two funds (SüdKulturFonds and visions sud est). Artlink has a mandate for the management of the SüdKulturFonds, all others submit projects to the SDC. They all contribute, to varying degrees and in different ways, to one or more of the following 4 objectives: (1) enabling access to the Swiss public; (2) promoting access to international markets, via access to contacts and networking; (3) supporting the development of competences; (4) financing local production. In our estimation, around 1/3 of the approximately CHF 1.991 million (calculation basis 2019) flows into supporting the access to the Swiss public, 1/3 into competence development and access to international markets, and 1/3 into the support for local production. In our opinion, the SDC should define this distribution of funds as well as the objectives of the individual partnerships, more strongly in the context of its own strategy and work more with mandates (instead of on a project basis).

The film value chain. To better understand the complex film world, we worked with the classic film value chain – although we are aware that this model will not be able to survive in the future due to the increasing digitalization. Through its Swiss partnerships, the SDC intervenes at many stages of the value chain: competence development (festivals, OD) > project development support (VSE, OD) > contact with funders (various festivals, OD) > production support (VSE) > Swiss premieres (OD, Visions du Réel) > 'International' (Swiss) distribution (trigon-film, various festivals). However, some are not covered: access to education, access to local/regional funding, local distribution and exploitation. In addition, there is a lack of a coordination strategy at partnership level which ensures that projects are supported all along the value chain.

The impact of the work of the SDC partners. Based on the previous evaluations, we have displayed the impact of the individual partnerships on filmmakers and in their countries of origin.

Trends and developments in the film sector. We have localised and described the following trends in the film industry in conversation with experts: (1) development of digital aspects and streaming (diversity of content and formats, a tax on platforms to boost local production, mainstream yes, but not only); (2) existential crisis for cinemas (from big screen to small screen, reduction of the number of cinemas, changing role in the value chain, large number of films and high communication costs, ageing arthouse-film audience in the Western context); (3) increased access to knowledge and technology (availability of knowledge, availability of production technology, easier access to festivals); (4) changing geographical hierarchies (reduced dependencies, new audiences and new content, Asia and Africa gaining in importance); (5) new funding models (lower costs, new funders and new audiences, local taxes, ad-supported extends to film, crowdfunding for film, overproduction of films); (6) an arthouse cinema under perfusion (privileged global content, arthouse cinema as museum).

Global trends. We go on to describe some global developments that also influence the film scene: (1) the acceleration of the digital revolution; (2) environmental challenges; (3) increased importance of diversity management; (4) the question of mobility.

Opportunities and risks for the SDC partners and S/E filmmakers. All these developments naturally not only influence the film industry as a whole, but also the current SDC partners. These developments

offer both opportunities and risks for the festivals, the funds and the film distribution. We assume that they will all continue to be important players in the (Swiss) film scene, although roles will shift and the offers will probably be more permeable and less specialised. For S/E filmmakers, too, the developments contain risks and opportunities. Opportunities are offered in particular in the areas of training, film production and distribution. A good internet access is crucial for S/E filmmakers to be able to take advantage of these opportunities.

5 scenarios for the development of the film industry on the horizon of 2030. Based on the trends and developments that are already manifesting themselves to varying degrees today, we have dared to take a look at the year 2030 and have drawn up 5 scenarios, each of which revolves around a central theme. Scenario 1: Democratisation of production; Scenario 2: Coexistence of cinema and VoD; Scenario 3: Change management for festivals; Scenario 4: The role of new audiences; Scenario 5: Widening gaps.

The SDC's objectives. With its cultural commitment, the SDC has overarching objectives. It also formulates objectives specifically for film promotion and for film partnerships. To that end, it uses a comparable matrix of objectives (output, indicators, outcomes, impact) in all contracts. We analysed this complex system taking into account the trends and scenarios we identified. The overarching objectives and the outcome objectives can remain in our opinion, but there are some additions and improvements: Our recommendations concern, for example, the inclusion of local dimensions in the formulation of objectives for the Swiss partners; we suggest giving even more weight to the visibility of S/E filmmaking, as well as always considering digitisation at all levels (selection of partners, definition of objectives, output). In sum, we find that it is acceptable and has advantages to continue the current practice of cooperation. Nevertheless, we suggest thinking about opening the circle of partners and about specifying the mutual expectations.

Possible measures. Against the background of the identified trends and in the light of the 5 scenarios, not only the objectives but also the measures need to be adapted. We have put together a series of possible measures that could be tested and their implementation monitored. All of them aim to strengthen the actors of the local S/E film industries - directly or indirectly via Swiss partners. We also suggest operating with a country strategy rather than using the DAC country categories. We also propose to increasingly promote partnership-based initiatives and new forms of local, regional or international cooperation in the future. In the sense of a broad-based, diverse and innovative engagement of the SDC, it would be important that beyond the existing partners, further Swiss organisations are given an incentive to get involved in favour of S/E film scenes and S/E filmmakers.

Recommendations. For the further procedure, we propose a strategy development process that allows (new) priorities to be set. It can start with the trends, scenarios and recommendations elaborated here and should be conducted in a circle of experts that goes beyond the existing cooperation partners and strongly involves S/E experts.

2. Situation analysis

Before we turn to new developments, we need an accurate assessment of the current situation. This is the basis for all future reflections.

2.1. Situation for arthouse filmmakers in their countries of origin

In interviews with S/E filmmakers, but above all by means of the online questionnaires sent to S/E filmmakers involved in the previous evaluations, we tried to gain an idea of the local working situation of the S/E filmmakers involved.¹⁰ We received a wide range of information, including personal assessments, descriptions of the cultural-political context, explanations of concrete needs and desiderata in the context of film promotion. It is important to keep in mind that the descriptions we collected from the participants are subjective snapshots of people who work in very different political and social contexts, in different professions and with different economic conditions. We do not try to describe the situation in individual countries - that would require in-depth research on the ground - but we group the descriptions according to problem situations and illustrate them with quotes from the surveys or from interviews with experts or S/E filmmakers.

2.1.1. Specific problems for S/E filmmakers

To the question "How would you describe the arthouse film scene in your country?", we received vastly different answers.

From "Very energetic, competitive and collaborative" to "Literally non-existent". Some of the statements of the survey participants and interviewees express an unabashedly positive assessment: their local art house film scene is "growing and having potential", "It's a very interesting moment", "It is very energetic, competitive and collaborative at the same time". The local initiatives of those who were involved in the activities of the SDC partners are also impressively diverse and numerous: "We are voluntarily doing arthouse film screenings, running small festivals, and making our own little brave films"; "There are some organizations run by filmmakers to unite and support filmmakers". The hopes of many rest on a new generation of filmmakers: "It's quite dynamic with a new generation of young filmmakers who are developing new film writing". Some also note an increasing international recognition of their country's filmmaking: "We don't have a great number of art house film producers, but some of them are award winners". There are also some hopeful voices from Myanmar¹¹ - the survey of OD participants was conducted before the military coup of February 2021. Some voices are very critical of their own arthouse film scene and doubt that there is an actual local arthouse film scene at all: arthouse-scene is "literally non-existent", "extremely poor", "I'm not sure if there is a scene". One statement relentlessly summarises: "Poor film education, no government support or public fund, less audience engagement, and no cinemas".

In many differentiated descriptions we have identified the following problem areas for the local arthouse film situation in S/E countries.

¹⁰ The online surveys for participants of Open Doors, for those filmmakers working with trigon-film and for recipients of a contribution from visions sud est contained corresponding questions.

¹¹ Filmmakers from Myanmar were invited to Open Doors Locarno.

Problems of local cultural promotion

- **Lack of local film funding in many countries.** Training in the various film professions, adequate infrastructure, financial support, festivals: in many countries, such instruments simply do not exist.
- **Instability of local cultural funding.** Some participants, including those from Latin America, described to us that the situation for film in their country changes quickly and abruptly depending on the political weather, that it is as unstable as the institutions responsible for cultural funding in their countries. While they have considerable funds at their disposal at one point in time, they are fundamentally questioned at another. Even with fixed sums promised by local funding institutions, filmmakers cannot always count on them, which makes the planning and realisation of expensive film projects extremely difficult.
- **Problematic allocation of local funding.** Even when local funding opportunities exist, many survey participants and experts are very critical of local funding practices. There is repeated talk of corruption, incompetence, lack of transparency and, time and again, of censorship and favouritism in the allocation of funding. “If some support exists, they are linked to political decisions. And the independents almost do not have access to it”. In many places, there is no cultural policy in the narrower sense that would also recognise the value of film as a cultural asset (worthy of support). In many countries, access to training and funding remains the privilege of a certain minority.

Structural problems of local filmmaking

- **Problematic distribution: cinema, VoD.** Many responses suggest that one of the biggest problems for arthouse filmmakers is to distribute their films locally or regionally. The cinema landscape worldwide - where it exists - is undergoing a dramatic transformation, mainly due to the strong competition from VoD platforms, and this also applies, even more so, to the already fragile cinema landscape in many S/E countries. The arthouse cinemas - if they exist - are disappearing or belong to European organisations (Institut français, Goethe Institut, British council). “We don't even have an arthouse cinema or a permanent venue that screens arthouse films”. According to experts, there is a lack of cinemas in many places that focus on local filmmaking instead of Western and North American mainstream or regional commercial products e.g. from Bollywood.

Meanwhile, there exists a range of international or local VoD platforms in S/E countries (e.g. MUBI, Yebo and Showmax in Africa) that give alternative filmmaking a place, but most of them are linked to TV channels and do not care much for arthouse film: “Alternative distribution channels are missing. Young arthouse filmmakers are struggling to negotiate with VoD and OTT for alternative programming for a niche audience”; “Distribution is reliant upon international streamers”.

- **Lack of local audiences for arthouse films.** Many describe how difficult it is to win a local audience for arthouse filmmaking. Some statements explain this with a lack of local tradition: “Audiences are not familiar with arthouse film”; “The cinema literacy is too poor”. Others explain that the reason is the local cinemas’ main focus on commercially interesting films, so that cinema audiences do not even get in touch with arthouse films. In some places, there is a danger that arthouse filmmakers will remain among themselves: “We are watching each other's films at home”, and that the films will find an audience internationally but not locally: “Thriving in international film

festivals but not in their own country". Only a few S/E countries counteract this with targeted audience development, e.g. in schools: "There is a lack of institutional and educational respect for the art of filmmaking".

- **Dependence on international co-production and post-production.** Co-production with Western organisations remains an almost obligatory step in order to promote films on a European/international level. Post-production structures and skills are almost non-existent, and the passage through Europe weighs on budgets and impacts the aesthetics of films. "The post-production of the films I shot in Africa took place in France and Belgium, and this weighed not only on the overall cost of the film, but also on an almost editorial aspect. Post-production is a form of writing, it has an influence on the formatting of the story because it touches on the codifications linked to each person's culture"¹².
- **Quality problems in local arthouse film production.** Some survey participants and interview partners speak openly about the quality problems of the local film scene, including the arthouse film scene: "It is underdeveloped"; "I honestly have to say that I haven't seen yet a good arthouse film from my country". In many places, this is the result of an unsatisfactory training situation on the one hand, and a lack of production resources on the other. Of course, this varies greatly in the S/E countries consulted, but many survey participants point to very poor, outdated and unrealistic training.

Economic problems of the local film scene

- **Overpriced promotional platforms.** Access to the industry and to professional networks is still through international festivals and their competitions. Submitting a film to these competitions can cost up to CHF 2,000 per film, not including the costs of participation, which few can afford. While some festivals cover these costs for S/E countries, such as DOK Leipzig, some countries such as France impose a carbon tax on festival-goers depending on where they come from, which further penalises the poorest.
- **Dependence on international funding.** In many places, there are no or insufficient opportunities to obtain local government funding for film production, so filmmakers, especially those outside the mainstream, are very dependent on international donors, funds and support programmes to be able to work at all. "The only option left for arthouse filmmakers is to compete for foreign film funds, mostly European"; "Films that do not fit the mainstream format (Bollywood inspired) cannot be made in my country without strong co-productions and support from outside". Several experts and interviewees regret all the more that some funds have tended to reduce their funding in recent years. Fundraising is extremely complex and time-consuming - especially for S/E producers who sometimes have little experience. Local investors often do not show the necessary understanding for arthouse filmmakers, as they see the investment in the film as a (potentially profitable) financial investment.

¹² Interview with franco-senegalese filmmaker Alain Gomis in Libération: „Il faudrait parvenir à créer des solutions de financement en Afrique». https://www.liberation.fr/culture/cinema/il-faudrait-parvenir-a-creer-des-solutions-de-financement-en-afrique-20210423_IVZTDI5E15BELPA7WKQRQHL4AY/

- **Little access to technology, work tools and personal devices.** In many countries, cultural actors do not have access to the necessary work equipment (lack of computer or camera, internet connection too expensive or non-existent) and the population does not have access to screens. In addition, access to VoD platforms is reserved for those who have the technology, and the lack of a (reliable) online payment system in some places makes it difficult for potential VoD providers to invest in VoD platforms.

Social problems

- **Political and social problems: censorship, poverty, war.** In many places, the enormous social problems have an impact on the daily work of filmmakers, making it difficult or impossible. The examples given to us testify to interstate or internal conflicts, to censorship and repression, to a great urban-rural divide and to (film) culture as a privilege of a small class in often poverty-stricken S/E regions. “We are coming after a 40-year war, most of our theatres and cinema halls were damaged or burned”; “Our country has huge economic difficulties and cinema has never been a priority”; “Both the censorship issue from the government and the lack of interest from the audience are huge challenges”; “Logistics for film shooting and creating a professional film crew are extremely difficult because of the conflictive political situation.”

2.1.2. Specific desiderata of the S/E film scene

“What else should SDC do for the film sector in those countries/regions? How could they significantly support?” In response to these questions, S/E filmmakers and experts formulated the following desiderata:

- Access to good training opportunities: especially technical and managerial know-how, especially fundraising.
- Local and regional funds for film and other cultural professionals
- Larger international funds for production financing
- More international co-production partners
- Strengthening the local festival scene as the focal point of the local film scene
- Improved local diffusion and distribution possibilities
- More distribution channels worldwide that include and promote S/E filmmaking
- Funding opportunities for regional mobility (participation in festivals, scouting, for festival curators)
- Financing of participation in festivals (registration and travel)
- Support with applications (for funding, festival participation), e.g. because of language problems
- Local film audience development initiatives
- Increased contact opportunities with key figures of the international film scene
- Promotion and other support through the local SDC representations

2.2. The SDC's commitment to film

2.2.1. The SDC's commitment to culture and development, particularly in the field of film

The SDC cooperates with various Swiss partners with the main objective of actively supporting artists and thereby helping to strengthen the cultural scene in their countries. The SDC defines its objectives as follows:

- *Facilitating access to the Swiss cultural market and international networks for artists and cultural creators from the South and East*
- *Support for access to the Swiss (and international) public, in particular for forms of cultural expression reflecting social and development-relevant content*

2.2.2. The impacts (intended direct effects - outcome) of the SDC's film policy

1. *Filmmakers from the South and East gain recognition (Awareness).*
2. *Participants can access international networks (Contacts & Networks).*
3. *They can generate income (Income).*
4. *Artistic, technical and strategic skills of filmmakers and producers are enhanced (Competences).*
5. *Countries where the producing and financing of art films is complicated are given special attention (Attention).*

2.2.3. The SDC's partnerships in the film sector

a) Forms of partnerships

The SDC has established long-term collaborations with the following organisations:

- four festivals: the Locarno Film Festival and its Open Doors section, the Fribourg International Film Festival (FIFF), the documentary film festival Visions du Réel in Nyon (VdR) and the Internationale Kurzfilmtage Winterthur (IKFW)
- a distributor: the trigon-film foundation
- two funds: the fonds visions sud est, which supports film production, and the SüdKulturFonds, which supports the presence of S/E films at Swiss festivals¹³.

¹³ In 2019, the following festivals received support for the presentation of films and / or the invitation of filmmakers / producers from S/E countries: Black Movie Genève; Film Oriental Genève; Human Rights Film Festival Zürich; Festival cinémas d'Afrique Lausanne; Film en Amérique Latina Genève; Rencontres cinématographiques Palestine Genève; Pantalla Latina 2019 St. Gallen; Weltfilmtage Thusis.

b) Brief portrait of the current SDC partners in the film sector¹⁴

Open Doors at the Locarno Film Festival was initiated in 2003 and is now a one-week special programme taking place during LFF for film professionals from a focal region (mainly countries and regions in the South and East) who are invited to come to Locarno. They gain insight into many aspects of the film industry, receive feedback on their own projects and present them to film professionals, and meetings are organised for them with potential cooperation partners. Several prizes and awards are presented during Open Doors, including the Open Doors Grants. Since 2019, a year-round online presence with an advisory service exists with Open Doors Extended.

The Fribourg International Film Festival is held every March and will take place for the 35th time in 2021, exceptionally in July due to Covid-19. With its programme, the festival aims at promoting the exchange and understanding between cultures. In addition, it offers a wide range of year-round activities. FiFF is an audience-oriented festival that offers a broad panorama of filmmaking in several sections parallel to its international competitions. Each year, each section focuses on a specific theme. Alongside trigon-film, FiFF is a co-founder of the *visions sud est* fund.

Visions du Réel in Nyon was founded in 1969 and is the only documentary film festival in Switzerland, and as such has an international significance. The festival is aimed at both a general public and an expert audience. The festival supports documentary filmmaking at all stages of production through the activities of its film market, the industry. In addition to screenings, the festival also offers convivial spaces where the general public, film professionals and guest directors can meet.

The Internationale Kurzfilmtage Winterthur take place annually in November and are regarded as a popular public festival and important meeting place for the international short film industry. The festival provides an insight into different worlds and aims to stimulate discussion of political and social issues and offers a programme of installations and interventions. As Swiss centre of competence for the short film, the Kurzfilmtage are also committed to the promotion of Swiss short films and to maintaining the largest short film archive in Switzerland.

trigon-film is a Swiss film foundation, which since 1988 has been distributing films from Latin America, Asia, Africa and Eastern Europe. trigon-film has until now brought more than 700 films from the south and east to the Swiss cinemas. The films are also published on DVD/Blu-ray, with German and French subtitles. Since 2013, trigon-film has been running the VoD platform www.filmingo.ch. trigon-film invites directors to their premieres, promotes their films and consults filmmakers.

The *visions sud est* fund was created in 2005 by trigon-film, the Fribourg International Film Festival and the Visions du Réel festival, joined in 2011 by the Locarno Film Festival and, in 2019, by the Internationale Kurzfilmtage Winterthur. Financed from the outset by the SDC, the fund supports film productions from Asia, Africa, Latin America and Eastern Europe. Directors and producers from these regions may submit two applications per year for funding for film projects of at least 70 minutes in length (fiction or documentary films in post-production; no short films or TV movies). Projects are selected by a jury composed of experts from the fund's member festivals and trigon-film.

The SüdKulturfonds was created in 1990 to promote the access to the market for cultural practitioners from the south and east and, until 2010, to increase the diversity of the Swiss cultural landscape. Its support concerns different art disciplines; only a part of the SüdKulturfonds is allocated to film

¹⁴ For further information on the organisations, please refer to the individual evaluations on the SDC website and to each organisation's own website.

promotion. Initially supported by various Swiss aid organisations, the SKF has been financed exclusively by the SDC since 2007. Under its mandate, Artlink manages the SüdKulturFonds. Via deficit guarantees and project contributions, the SKF supports productions and events in Switzerland in which artists from Africa, Asia, Latin America and Eastern Europe are involved. Several Swiss film festivals are also regularly amongst those supported.

c) Objectives of the partnerships

In its contracts with its partners, the SDC does not specify the specific objective of its partnership. It refers to the results to be achieved (output) as well as the outcome and impact objectives (similar for all partners). Indeed, with the exception of Artlink for the management of the SüdKulturFonds, which receives a mandate, the SDC grants project support to its partners and thus relies on the objectives as formulated by the partners themselves.

For the sake of simplicity, we have grouped these partnerships according to the following 4 objectives:

- 1. Provide access to the Swiss public.** These are the objectives of trigon-film, the SüdKulturFonds (by supporting the presence of films in several Swiss festivals) and the four supported festivals. These partners mainly address the Swiss public, to whom they make the films of the S/E accessible by various means (public presentations, cinema distribution, VoD platform, mediation in schools). These partners make a significant contribution to the diversity of the film offer in Switzerland.
- 2. Promote access to international markets, through contacts and networking.** Three festivals, the Locarno Festival, Visions du Réel and the Internationale Kurzfilmtage Winterthur, make it possible, in addition to making films visible to their audiences, to connect filmmakers and producers from the S/E countries with the film industry. The Locarno Festival and Visions du Réel are specifically designed to encourage networking thanks to the presence of numerous professionals, enabling filmmakers from S/E countries to make themselves known and to establish future collaborations. With its focus on short films, the Kurzfilmtage Winterthur are also an interesting platform for European professionals looking for new talent.
- 3. Support skills development.** While most festivals offer modules to develop artistic, technical or market understanding skills, Locarno's Open Doors format has developed a very elaborate laboratory format, with ramifications that extend into the S/E countries. It should be noted that each festival supported by the SDC offers their own modules to develop skills.
- 4. Finance local production.** The visions sud est fund offers direct financial aid to enable filmmaking, thanks to support for local production. However, it should be mentioned that also trigon-film, by paying "guarantees" to the filmmakers or producers of the films it distributes, also contributes in an indirect - but not negligible - way to financing the realisation of future films.

d) Financial breakdown by SDC partnership objectives

From a financial point of view, the SDC currently commits (base 2019¹⁵) CHF 1,991,167 per year to its film promotion policy.

¹⁵ The figures below are based on the 2019 support according to the contracts with the SDC. For the SüdKulturFonds, only the contributions to the film festivals in 2019 have been counted.

Locarno / Open Doors (split amount)	CHF 516,667
trigon-film	CHF 412,500
FIFF - Fribourg International Film Festival	CHF 350,000
visions sud est	CHF 343,000
Festival Visions du Réel	CHF 150'000
SüdKulturFonds (Film expenses)	CHF 139,000
Internationale Kurzfilmtage Winterthur (IKFW)	CHF 80'000

Most of the partners address several objectives. Some, for example, mainly support the access to the Swiss public, while also developing offers for skills development, depending on the partner's profile. Another example: trigon-film returns about 70% of the SDC's contribution in 2013-2019 to the filmmakers or their producers in the form of guarantees and profit-sharing, a substantial income that is often re-invested in the production.

There is no allocation key to determine how much is invested for which objective. We have made a very rough estimate based on the available data. On this basis, we have found that the SDC invests about 1/3 of its support in access to the Swiss public, 1/3 in competence development and access to international markets, and 1/3 into the support for local production if we include part of the support to trigon-film.

However, these allocations are still estimates and should be checked with the partners if they are to be used as a basis for future decisions.

To our knowledge, this distribution is not based on an explicit strategy on the part of the SDC.

2.3. The role of the SDC partners within the film value chain

The SDC's film promotion strategy in Switzerland touches on various levels of the film value chain as it was before digitisation (see illustration below¹⁶), and in particular before all the offers resulting from streaming overturned the value chain's foundations (cf. chapter 4).



Using the logic of the value chain, we can see what SDC partnerships cover and what they do not. It should be noted, however, that this classification should be analysed with caution. Indeed, only a limited number of filmmakers and producers can benefit from the opportunities offered by the partners¹⁷.

¹⁶ Established based on: The Independent Film Project Value Chain, Bloore (2009).

¹⁷ For example: Locarno and Visions du Réel offer every year the possibility for fifty filmmakers of the South and the East to access professional networks via their festivals.

2.3.1. What the cooperations in Switzerland cover

The actions of the SDC and its partners touch many of the levels of the value chain:

Education and skills: skills development. The supported partner festivals all offer modules for the development of artistic and technical skills as well as industry understanding and international networking. Open Doors is particularly committed to this objective.

Project development: project development assistance. Although extremely limited, this aspect is covered by the award funded by visions sud est in the framework of Open Doors.

Financing and pre-sales: contact with funders. Thanks to access to professional Swiss platforms, filmmakers are able to make contact with financiers, funds, co-producers and agents of their future films. It should be noted, however, that it is not possible for Swiss co-producers to commit themselves, due to the lack of a co-production agreement with these countries, which makes the financing of a project extremely difficult, if not impossible¹⁸.

Production: shoot and post: production support. Direct financial support for creation is provided by visions sud est.

Premiere, sales and licensing: premiere in Switzerland. Locarno and Visions du Réel in particular offer films the visibility they need to access the international market.

“International” distribution, more specifically in Switzerland. Trigon-film and the supported festivals (also via the SüdKulturFonds) ensure visibility on Swiss screens mainly¹⁹.

2.3.2. What the cooperations in Switzerland do not cover

Other elements in the value chain are not supported by the SDC's commitment:

Education and skills: Access to education. Many countries do not have film schools. There is also a lack of local training for different professions: production management, technicians, festival curators, etc.

Financing & pre-sales: Access to local/regional financing. Filmmakers or producers have difficulty accessing regional professional platforms because they do not have the financial means to access them (travel, accommodation).

Exhibition and Exploitation: Local distribution and exploitation. There is no strategy that enables the films to reach their local audience.

Beyond the different levels of the value chain as such, there is the question of coherence, respectively the continuity of the actions undertaken. How does a selected and supported project find its way through the value chain?

¹⁸ For further information on Switzerland's international coproduction agreements: <https://www.bak.admin.ch/bak/fr/home/creation-culturelle/cinema/collaboration-internationale/accords-de-coproduction.html>.

¹⁹ trigon also holds rights for Germany and Austria at times.

There is no formal coordinated strategy expected from the partners supported by the SDC, which could give the impression that it is therefore a slightly random strategy. Nevertheless, informally, some partners have the possibility to exchange regularly, as is the case for those associated with the visions of the SDC's impact objectives. This suggests that there are exchanges on these issues.

2.4. Impact of SDC film promotion via its Swiss partnerships

The table in this chapter is structured according to impact level (impact on filmmakers, impact in the S/E country of origin, other impacts) and assigns the impacts to one of the 5 outcome objectives or one of the SDC's impact objectives (see below).

2.4.1. Impact on filmmakers

The SDC formulates the following impacts (intended direct effects - outcome) of its film policy:

1. *Filmmakers from the South and East gain recognition (Awareness)*
2. *Participants can access international contact networks (Contacts & Networks)*
3. *They can generate income (Income)*
4. *Artistic, technical and strategic skills of filmmakers and producers are enhanced (Competences)*
5. *Countries where the producing and financing of art films is complicated are given special attention (Attention).*

2.4.2. Impact in countries of origin

In all contracts with its cooperation partners in the film sector, the SDC formulates in a comparable matrix of objectives (consisting of outputs, indicators, outcomes, impact) the intended impacts in the countries of the South and East. The work of the individual partners should:

- *Contribute to the strengthening of independent voices and independent works (Independence).*
- *Contribute to the strengthening of local competences for artistic creation and education (Competences).*
- *Contribute to strengthening the role of filmmakers in discussions and processes relevant to civil society (Civil Society).*
- *Contribute to strengthening the further development of the independent film sector (Further Development).*

In the framework of this evaluation, it was not possible to analyse the actual impact in the countries of origin according to these 5 impact objectives. However, the previous evaluations of the various SDC partnerships, including interviews with beneficiaries in S/E countries, have made it possible to identify certain concrete effects in S/E countries, which we report in the table below.

2.4.3. Other impacts

In addition to the impacts on filmmakers and impacts in the S/E countries, we have identified several other impacts, which we also present in the following table.

2.4.4. Summary of the impacts

In concrete terms, the following impacts (intended direct effects - outcomes) were evaluated with the SDC's Swiss partners:

Key:  = this effect is very pronounced;  = this effect is present but not very pronounced; empty field = no significant impact

		<i>Production grant</i>	<i>Platforms with main focus on audience</i>	<i>Platforms for audience and Filmindustry</i>	<i>Distributor</i>
	SDC partners in Switzerland	- visions sud est	- FiFF Fribourg - SüdKultur-Fonds->Festivals	- Visions du Réel - Open Doors - IKFTW Winterthur	- trigon-film
	I Impact on filmmakers				
Awareness	- S/E filmmakers receive attention from a (mainly) Swiss audience				
	- Stepping stone effect for the career of S/E filmmakers				
Networks & contacts	- S/E filmmakers get connected with Swiss and international professionals				
	- S/E filmmakers find international distributors and receive invitations (festivals, workshops).				
Income	- S/E filmmakers can generate an income				
	- S/E filmmakers can produce their films				
	- S/E filmmakers increase competences in fundraising				
	- S/E filmmakers meet potential funders / coproducers				
Competences	- S/E filmmakers can improve skills				
	- S/E filmmakers are able to implement their projects with stronger independency				
Attention	- Swiss audiences get a more diverse offer of films and access to diverse voices / perspectives				
	II Impact in countries of origin				
Independence - Competence	- International attention encourages S/E filmmakers to pursue their activities				
	- S/E filmmakers contribute to the professionalization and development of the sector in own country				

	- Increased awareness among professionals in own country			✓	
	- Increased awareness among funding institutions / authorities in own country	✓		✓	
	- Increase of the mobility of the filmmakers		✓	✓	✓
III Other effects					
	- Swiss audiences get a more diverse offer of films and access to diverse voices / perspectives		✓	✓	✓
	- Swiss festivals with S/E contents are reinforced		✓	✓	
	- Swiss professionals get connected with S/E filmmakers, can exchange and improve skills		✓	✓	
	- Motivates Swiss players to get involved in S/E films		✓	✓	

3. Trends and their impact on the film value chain

This chapter is structured as follows: First, the trends in the film industry and global developments including their potential influence on the film sector are described in chapter 3.1. Chapter 3.2. describes the opportunities and risks of these developments for the SDC partners and chapter 3.3. describes the opportunities and risks of these developments for S/E filmmakers.

The information in this chapter is based on various research studies. First of all, it incorporates the responses to interviews held with Swiss and international professionals, including six from S/E countries, as well as the responses collected in the online survey from 184 filmmakers and producers from S/E countries (see chapter 1.1.). The text is punctuated by their quotes. Finally, they also rely on various articles, reports and analyses dealing with these issues²⁰.

The questions formulated were based on the SDC's evaluation mandate, i.e. "What changes already have or will have an impact on the film industry in the future?"²¹

Increasing digitisation and the growing demand for online content have changed the film industry and the value chain. Whereas up to now we have been dealing with an essentially linear model of the value chain in the field of artistic creation, in the future the processes and dependencies, especially in the technology-based film industry, can only be represented in a complete network model, as shown in the following diagram.

²⁰ Various sources:

Stephen Follows: 48 trends reshaping the film industry

United States International Trade Commission (USITC): NIGERIA'S FILM INDUSTRY

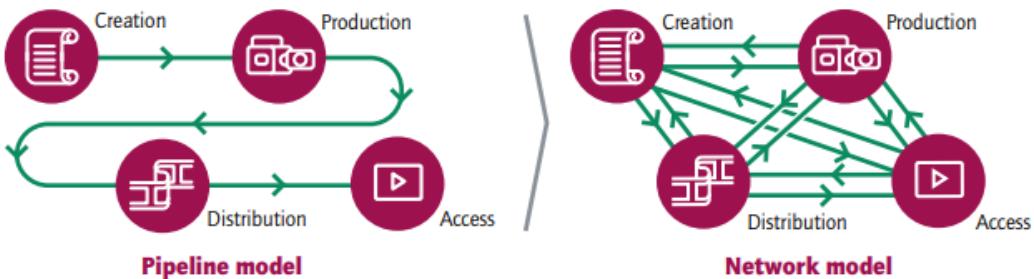
Filmbranche im Umbruch - Das Internet rüttelt am Fundament der Kinobranche - Kultur - SRF

Filmbranche im Umbruch - Schweizer Filmbusiness wappnet sich für die Zukunft - Kultur - SRF

<https://www.kulturrat.de/themen/europa-internationales/kultur-creativwirtschaft-in-africa/ressource-creativitaet/?print=print>

²¹ We have fanned them out as follows: "What is the impact of these trends and developments on the aesthetic and thematic level for arthouse films from the South and East? As well as on the production of arthouse films in the South and East?"; "What is the impact of these trends and developments on filmmakers and producers? Do they represent an opportunity? Or a risk, or a danger?"; "What do these trends and developments signify, in particular for those organisations involved in the presentation, distribution and marketing of arthouse films from the South and East?"

DIGITAL TECHNOLOGIES HAVE TRANSFORMED THE CULTURAL VALUE CHAIN



Source: UNESCO, *Reshaping Cultural Policy*, 2018

The entire production, distribution and reception system is thus being called into question and its players must rethink it in order to adapt to the changes. The impact of this major transition is very wide-ranging, also for its multiple actors. This analysis focuses mainly on aspects related to the objectives set by the SDC in its policy of film promotion in favour of directors and producers in the South and East.

3.1. Trends in the film industry

On the basis of the various interviews, surveys and research, the following trends could be identified.

3.1.1. Digital and streaming development

Digital developments have profoundly changed the world of cinema. The emergence of online content has led to a change in consumer behaviour, but has also created a new environment for the circulation of films. Among the many issues involved in this theme, the following aspects can be mentioned:

Diversity of content and formats. Digital platforms have multiplied the possibilities for presenting a film, thus making room for a greater diversity of content. In addition to selective platforms such as Netflix, Amazon, Disney, Apple, etc., or specialised platforms such as MUBI, Yebo or filmingo, there are also non-selective platforms known as AVoD²² such as Tubi, Pluto, or even YouTube and Vimeo, which offer everyone the possibility of making their content accessible. The internet thus constitutes an unprecedented space for the circulation of rare films that are accessible anywhere in the world. Thanks to digital technology, new formats and types of narration, based on immersive technologies²³, are being established. Finally, film is mainly thought of for the needs of the small screen, the medium through which it is mainly consumed.

²² Advertising Video on Demand, or streaming financed by advertisement.

²³ Immersive technologies immerse the user in a virtual universe or make them interact with an extended environment through virtual elements. Virtual content is thus perceived as very close to reality. The degree of immersion depends on the possibility of interaction with the digital environment.

A tax on platforms to boost local production. Another issue is the establishing of regulations to guarantee local content, such as the collection of national taxes from streaming platforms, as is the case with the sale of cinema tickets, which would make it possible to support local production. In Europe, for example, this guarantee of diversity is reflected in the new European directives²⁴ for audio-visual media services, which will require the inclusion of at least 30% European content in the catalogues of VoD platforms. Other countries, for example in Africa, could also require this, which represents new opportunities for filmmakers from S/E countries.

Mainstream yes, but not only. Some trends show that big players like Netflix or Amazon will play an important role in the production and distribution of arthouse films in the future. Amazon, for example, is seeking to increase its market share through original film production and exclusive acquisitions, and has thus begun to support smaller, more arthouse-like films, with relatively flexible contractual terms with filmmakers. But this remains a relatively marginal commitment.

3.1.2. Existential crisis for cinemas

From the big screen to the small screen. More films are already designed for the small screen and unsuitable for the big screen. This trend is increasing.

Reduction in the number of cinemas. The growing importance of streaming platforms is creating unbeatable competition for cinemas, leading to a reduction in the number of cinema-goers, and thus putting the existence of cinemas at risk. Even though the big screen has already survived many crises, be it the arrival of television, video or the internet, the number of cinemas is likely to decrease. The COVID-19 measures have only accelerated the shut-down of some of them. According to the experts consulted, in the West only multiplex cinemas offering extraordinary experiences and small art house cinemas with a strong profile have a chance of surviving. The cinema "outing" will have to offer an entertainment opportunity that is not available at home (via VoD), a complete experience, including socialising, gastronomy and allowing exclusive experiences. Some cinemas will not have the infrastructure to adapt to these challenges. In many countries, there were already very few cinemas, and there is a risk that they will disappear completely due to lack of public support.

Change of role in the value chain. Theatrical releases are no longer the only way for a film to reach its audience. A role of the cinemas thus falls away.

Large number of films - high communication costs. In addition, the number of films produced is rising sharply, which puts pressure on faster turnover in cinemas, and thus multiplies communication costs. Priority is thus given to films that generate sufficient revenues, and arthouse films, including those from the S/E countries, will struggle to find their place. The COVID-19 measures will accelerate this too, as there is a 'queue' for films that did not have the opportunity to be released during the pandemic. It is expected that there will be a high level of competition among films as well as a reduction in the length of time they are in theatres.

The ageing of the arthouse film audience in the Western context. Many arthouse cinemas can count on a loyal audience. However, this is a relatively old audience and the question arises whether and how one can attract a new audience. Few countries have strong audience development strategies for cinema, which does not help to win over a younger audience.

²⁴ EU guideline on audio-visual media services 2018/188: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A32018L1808>

3.1.3. Increased access to knowledge and technology

Availability of knowledge. For those with internet access, the field of opportunities is growing. Access to training, information and discourse is available online: universities, festivals, NGOs and professionals share their knowledge, often in *open access*. The creation of regional or international networks of peers is also facilitated and reaches a larger number of people, regardless of their geographical location.

Availability of production technology. But it is also all the tools needed for filming (cameras, sound recording) that have become more affordable. Even a mobile phone now has the technology to produce images of sufficient quality for the small screen. In addition, software used by industry professionals (e.g. for film editing) is often available through illegal piracy, through free trial versions, open source or “educational” versions. Thanks to cheap and high-quality accessible technology, the number of films entering the market is massively increasing. Technically and artistically, a real alternative to the very expensive method of producing arthouse films is emerging.

Easier access to festivals. Finally, promotional platforms, including festivals, have made themselves much more accessible to filmmakers and producers by making it much easier for them to apply for competitions through online submission systems to their competitions.

3.1.4. Changing geographical hierarchies

Mitigation of dependencies. Access to information and technology increases the chances of developing countries to penetrate markets by their own means. But it also injects new knowledge, new expertise and new working methods into international networks that no longer come almost exclusively from the West.

New audiences - new content. Thanks to the more globalised access offered by VoD, film consumption in general is increasing, which influences demand and therefore the market. For the film industry, including the platforms, this increase does not only mean more viewers and more revenue. It also influences the content. Indeed, these consumers have expectations, to which streaming providers have to adapt, by proposing an offer that best coincides with their interests and the consumers' stories. Netflix, for example, has recently committed to producing non-English speaking films devoted to African stories. Such developments can strengthen the film industries of S/E countries, as well as their own productions. The dominance of Western culture in terms of the films available on the market is thus changing: the offer is becoming more diverse, giving more space to new narratives and aesthetics.

Asia and Africa are gaining in importance. Moreover, although Europe and the United States are still the main players in this market, also in terms of prestige, they are gradually losing their importance. Indeed, film production is booming in other countries, such as India, South Corea or China, but also on the African continent, especially in the entertainment film industry. Asian buyers are increasingly present in the film markets and the Chinese market itself is developing at a very fast pace.

3.1.5. New funding models

Financing methods are part of the important changes in the film value chain.

Lower costs. Films can be produced more cheaply, but also reach their audiences directly via digital platforms, without going through (and therefore without funding) other intermediaries (including distributors). Blockchain technology could also contribute to this.

New funders and new audiences. The new markets of funders, particularly from Asia, and the income generated by consumers mentioned above play an important role in the multiplication and diversification of funding sources. In addition, there will be:

Local taxes. The generalisation of the principle of local taxes imposed on VoD platforms, which would offer new funding opportunities to local governments.

Ad-supported²⁵ is expanding to film. Advertising-supported models, via sites such as YouTube, can generate revenue. Content creators can earn money based on the number of views of their content.

So is crowdfunding. Crowdfunding has become an important source of funding for independent films, via sites like Patreon, and is growing worldwide²⁶. If filmmakers create content for a dedicated niche audience, they often find additional funding and a fan base.

Overproduction as a consequence. These developments bring with them a great deal of overproduction, not particularly from S/E countries, but also from Europe. “It becomes very difficult for platforms and broadcasters to absorb this production. It is becoming a global problem, and this imbalance is no longer a North-South problem”.

3.1.6. An arthouse cinema under perfusion

Even though many of the developments mentioned above point to the potential for the development of arthouse cinema, its existence remains difficult.

Focus on global content. The big platforms will continue to prioritise content that reaches the widest possible audience. Although they will engage in local production, they will favour mainstream themes and therefore rather *mainstream* productions. Independent arthouse cinema will find it difficult to cope. Even if alternatives exist, such as the VoD-platforms MUBI or Heritage, which also give a place to the films of authors from S/E countries, some experts fear that the interest of new audiences will nevertheless remain limited regarding arthouse films. Maintaining or developing consumption to ensure their existence will remain a challenge.

Arthouse cinema as a museum. Arthouse cinema will not survive without a protected space: “As art needs a museum to preserve, explain, address to audience, we need to preserve cinemas (theatres) as a museum for arthouse films”. This leads some experts to think that “an essential relationship for arthouse cinema is the ‘physical’ relationship with an audience, and therefore the cinema hall. If there are no more cinemas, there are no more screens, there is no more arthouse cinema”.

3.2. Global changes affecting the film industry

The following non-exhaustive changes play an important role in the evolution of the sector.

²⁵ Advertising-supported revenue model. With this model, an organisation or an individual publishes free online content – videos, articles, photos, quotes – that ideally attracts hundreds, thousands or millions of visitors to the site each month. From a certain number of visitors onwards, advertisers finance ads related to these contents, allowing them to be in contact with these visitors.

²⁶ Cf. https://www.researchgate.net/publication/343589115_Crowdfunding_in_Africa_Opportunities_and_Challenges; <http://afrikstart.com/report/wp-content/uploads/2016/09/Afrikstart-Crowdfunding-In-Africa-Report.pdf>

3.2.1. The acceleration of the digital revolution

This revolution is fundamentally changing our relationships with each other as well as the way we live and work.

In the field of culture, the film industry is particularly affected. The resulting changes affect the entire value chain: from the training of filmmakers to the reception and conservation of works.

3.2.2. The global challenges of ecology

Climate change is one of the most important challenges of the 21st century.

Considerable CO2 footprint of film. The ecological impact of cultural production and artistic activities is generally not yet sufficiently taken into account²⁷. The film and television production industry generates carbon and greenhouse gas emissions, caused by transport, deliveries of production equipment, on-site generators and even pyrotechnic scenes. The same applies to the mobility of professionals involved in film promotion. While the film industry in the richer countries is taking small steps to curb global warming²⁸, most of the S/E countries do not have the resources to do so.

Fighting global warming instead of promoting culture. While the consequences of climate warming are a global problem, the consequences are most drastic in the poorer countries. Despite the commitment of the United Nations, there is a significant lack of resources to implement adaptation and mitigation measures that could reduce the vulnerability of poor countries²⁹. And although sustainable development identifies culture as an important field of action, the share of development assistance devoted to culture and recreation is now at its lowest level in over a decade³⁰. The immediate threats of climate change are forcing the poorest countries to prioritise climate-related mitigation.

3.2.3. Increased importance of diversity management

“Very often in the film world, juries lack people capable of putting things into context and of having a diversity of views. Of course one can always criticise the criteria for this diversity. But there is a need to confront ourselves with a viewpoint that is not male, heterosexual, white, Euro-centric and French or English-speaking”, an expert puts it.

Diversity is at the heart of all strategies, with the #MeToo and Black Lives Matter movements further accelerating the pace of change. Film festivals mirror this: they ensure diversity of genres, languages, origins and ages in the programming. “They are even reversing the trend, at the expense of those who have carried the cinema until now: the white male director or producer over 50 is no longer a priority”. Platforms like Netflix also play a fundamental role in this change. In search of audiences, they have the means to provide content to satisfy an increasingly varied public, which until now had no access to cinema. To summarise very briefly: The platforms will ensure that each community and each minority

²⁷ UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions, Global Report Cultural Policies 2018: <https://en.unesco.org/creativity/global-report-2018>

²⁸ For example, the largest American studios have joined forces to commit to sustainable film production: www.greenproductionguide.com.

²⁹ <https://www.un.org/en/chronicle/article/devastating-worlds-poor-climate-change-threatens-development-gains-already-achieved>

³⁰ UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions, Global Report Cultural Policies 2018: <https://en.unesco.org/creativity/global-report-2018>

representing a potential consumer has access to themes that concern them, in their language, and with which these communities and minorities can identify.

This reality is changing the demand and will influence the profile of tomorrow's filmmakers and the content of their films.

3.2.4. Mobility between a rock and a hard place

While mobility must be reduced where necessary for ecological reasons, it remains essential for the preservation of a heterogeneous world of ideas, values and perspectives, and for the promotion of a sustainable cultural and creative economy. This is becoming increasingly difficult in the current security climate. In some countries, restrictions on the free movement and mobility of artists are used as means of repression and censorship. Visa regulations continue to undermine the efforts of cultural institutions and civil society to address the persistent inequalities between North and South. And health restrictions make the situation even worse.

Virtual versus face-to-face. The years affected by the COVID-19 measures have shown in an exemplary manner the potential for connecting professionals and disseminating knowledge and works digitally. However, they have also shown the limits of the virtual: the creation of solid and sustainable professional networks requires social spaces that the internet cannot offer. With digital communication technologies, professional networks expand and multiply on a daily basis, but are less profound. "We rarely remember the people we meet in online workshops, but we keep in touch with those we meet at a festival."

The importance of scouting. Particularly in S/E countries, scouting work on the ground is essential to discover and accompany aspiring filmmakers – usually operating outside urban centres or coming from disadvantaged social classes - to enable them to access training, local platforms or intermediaries.

The importance of regional mobility. Film scenes and business in regions with easy mobility, such as within Asia, are more likely to develop. This allows access to training, access to regional networks and markets. "The strength of this region is the proximity and quality of exchanges (also economic) between the countries in the region, facilitated by the fact that movement is possible in the region, which is much more difficult in other regions such as Africa."

3.3. Opportunities and risks for the SDC's partners

This chapter discusses the extent to which the trends outlined above could have a positive and/or negative influence on the film scene.

3.3.1. Opportunities and risks for all stakeholders

The following aspects have an influence on all actors in the value chain, hence including the SDC's partners:

Increasing audiences and facilitating access. Streaming increases the potential for dissemination to audiences. For the audience, an ever wider offer is accessible. However, this potential can only be realised where the infrastructural and social conditions (e.g. internet access, knowledge of the offer) are actually in place. In addition, the question arises whether the social discourse about films does not

lose quality and relevance if film consumption takes place (almost) exclusively individually instead of collectively.

Democratisation of production. Not only is access to production facilitated by technology, but also new forms of financing increase the chances of being able to produce. The offer is therefore becoming more diverse, but with the consequence of overproduction and competition between films in terms of distribution possibilities.

Increased diversity. This is a positive development in terms of the multiplicity of perspectives, aesthetics and formats.

3.3.2. Opportunities and risks for distributors

More specifically, distributors may face the following risks and opportunities:

Reduction in the number of cinemas. Distributors depend on intermediaries to access the public. With the predicted disappearance of many cinemas, distributors are seeing their main “customer base” shrink. However, some distributors introduce streaming platforms and thus expand their offer. Nevertheless, this has the effect of further weakening their “customers”, the cinemas.

Increased competition with VoD platforms and festivals. “Platforms change the way we see and the way we distribute. The number of audiences is for example 40'000 spectators. In the cinema it would have been 2'000.” In the future we will see a multiplication of small, specialised streaming platforms (mubi.com; filmlivestreaming.ch; filmingo.ch; cinephile.ch ...), which will emerge in the wake of cinemas, festivals or distributors. Each one will have to establish a clear and attractive profile to position itself, and to develop a strong marketing strategy.

3.3.3. Opportunities and risks for festivals

More specifically, festivals may face the following risks and opportunities:

Changing formats, changing offer. Fewer films for the big screen and the proliferation of formats for small screens make festivals to rethink their relation to audiences, with a hybrid presence on big screen and online. Extended reality films or projects make it possible to create new meeting spaces for these new formats and to reach new audiences.

The event in question. Some festivals are becoming hybrids, offering streaming during the festival or even throughout the year. This has many advantages: increasing the possibilities of broadening the audience by offering, for example, educational activities. But “the event character is lost as everything is always available” and festivals risk losing their appeal.

Change of gatekeepers. With the arrival of digital platforms, festivals are no longer the almost unavoidable opportunity to allow the exploitation of film. The festival risks losing its dominant position and its attractiveness to industry professionals.

New places of diversity. However, with the reduction of cinema theatres, arthouse films in particular have less and less chance of being distributed in cinemas and thus shown to audiences. Festivals could therefore gain in importance regarding arthouse films as venues for the presentation.

3.3.4. Opportunities and risks for advanced training and networking

Democratisation of access to knowledge and information. Festivals and other Western providers of education and advanced training education no longer have a “monopoly” on these activites.

3.3.5. Opportunities and risks for funding bodies

More specifically, funding bodies may face the following risks and opportunities:

Access to hardware and technology. Even if technology becomes cheaper, a computer, a smartphone or a broadband internet connection remain financially unaffordable goods or services for a majority of the population in S/E countries. Funding bodies project support is not very effective if infrastructure and equipment are lacking.

Increasing competition. The overproduction brings an even more competitive situation for S/E films. Quality will be all the more decisive. This fact concerns production and post-production, but also translation, which sometimes wrongly penalises certain films internationally, and ultimately film promotion strategies. The films selected by the funds are increasingly competing in the market.

The need to gain autonomy. The field of investment is vast, and international aid funds can contribute to considerably develop the film landscape in the countries of the South and East by supporting cooperation projects and innovative forms of pooling resources.

3.4. Opportunities and risks for S/E filmmakers

3.4.1. Education, training, information, network

Access to knowledge and diversification of perspectives. Where the internet is accessible, access to knowledge and networks is democratised, and the exchange of expertise and perspectives is globalised, and no longer follows only North-South axes.

3.4.2. Production and content

Independence of S/E directors. Productions are cheaper, platforms are multiplying and could generate some income if the films manage to reach a certain audience and generate enough clicks to interest advertisers. “Filmmakers are now operating on their own, without dependence on Western funds or co-producers.” This is “the strength of new technologies: they can express themselves without the Eurocentric gaze”. “With the new technologies we have for the first time a direct look at stories told in self-production, which have not gone through the filter or the constraints sometimes imposed by the producers, often European.”

3.4.3. Visibility and distribution

Easier distribution. With online technologies, distribution is facilitated because it is in principle possible to send your film almost³¹ anywhere, and to make it accessible via non-selective platforms.

Increased competition for production. Overproduction is an additional challenge for S/E filmmakers and producers. They already lacked visibility and are faced with a growing competing offer.

The importance of mobility for young talent and diversity. “A lot of little festivals have competent consultants to scout, even in their own region. If there are no more possibility to travel, these B festivals would just program what sales agents have taken into their program or what A festivals have been programming.”

Influential gender and diversity discourse. For women and other groups that have so far been disadvantaged in the film scene, it could prove to be an opportunity for festivals, juries, funding agencies, etc. to pay more attention to the consideration of these groups. The political and social pressure can be a benefit for them, while for other (previously strongly represented) groups it can be a risk.

3.4.4. Reception

A local audience for local production and arthouse cinema. The online offer of platforms or festivals (among others), makes local production accessible to local audiences. “MUBI, for example, is now in India. Before, there was no room in theatres in India for such a film. There still isn't. But now there is a platform with this offer.” Experiences with streaming at festivals have shown that the strongest response comes from the films’ countries of origin.

3.4.5. Financing and Revenues

Diversification of sources. The increased demand for VoD from various parts of the world is encouraging funders to invest in local production. If the S/E countries manage to levy a tax on streaming from the major platforms in their country, this is an additional chance for them to generate financial support for their production.

3.4.6. Technology and infrastructure

Most important: internet access. All the developments mentioned above are based on one essential pillar: access to the internet. Countries without internet access, due to lack of technology or access limited by decisions of local politics, will remain very much on the sidelines of these new opportunities.

4. Scenarios for the development of the film industry in the horizon of 2030

Based on the trends presented above and the resulting opportunities and risks, we have created five scenarios for the future development of the film industry, assuming a medium time horizon (2030). The scenarios are neither mutually exclusive nor mutually dependent; rather, we assume a parallel

³¹ The major streaming platforms remain inaccessible.

development. We have discussed the scenarios with experts from the field of film with regard to their plausibility, and they were widely met with approval. They are intended as starting points for further considerations regarding the SDC's film policy.

1) Democratisation of production

Thanks to the widespread availability of powerful mobile phones and computers, digitally available know-how and training, as well as production software available via *open source* (or piracy) and faster data transfer, film production (including post-production) is facilitated. Thanks to this dynamic, which already started in the 2000s, production is no longer restricted to those who have access to the Western financing system and expensive production infrastructure. Access to film production is now also given to creative people from other professions or even to amateurs, who will be able to surprise with original stories, because they are willing to take risks. In the mass of film productions that will emerge in this way, the current distinctions between film genres, between art house and mainstream, between local and international production, between professional and non-professional production methods will fade and disappear. A great space of diversity and creativity will emerge, in which the countries of the South, especially Africa with its young, social network-savvy population, will appear with self-confidence and less dependence on the Eurocentric or cinephile gaze in the classical sense. The films will be financed by crowdfunding, by paying users or by advertising, as well as by local funds that will be set up such as the Mali Film Industry Support Fund FAIC. They will also be offered on AVoD platforms such as You Tube, Vimeo or on geo-blocked platforms such as Showmax or Yebo. Big players like Netflix, who will have to reinvest in local cinema via their local market share, will try to siphon off indigenous talent and compete with a booming local creative industry. Support for quality production remains crucial. Identifying quality in the mass of productions will be a very big challenge. Competition between filmmakers and producers is intensifying, the market is becoming more volatile and professions and careers are becoming less linear.

2) Coexistence of cinema and VoD

Cinemas have lost their primacy as the place of first exhibition of films, now that this is no longer necessarily a criteria to receive certain awards or subsidies and the exploitation windows for the release of films on VoD channels are shortened. Under the pressure of the enormous competition from VoD platforms, the cinema landscape is radically thinning out, with two players able to hold their own in the Western context: on the one hand the technically highly equipped multiplex cinemas with their immersive entertainment offer, and on the other hand the small cinemas with a cultural function as a film museum and meeting place. The latter offer niche productions aimed at a small, mostly older audience that values exclusivity and social interaction. These cinemas focus on direct customer relations and the artistic experience. They guarantee a diversity of films; the arthouse cinema of the future is a cultural venue which, like theatres and opera houses, has an artistic profile and does not primarily aim for commercial success. In S/E countries, where there are already fewer cinemas - cinemas being a Western concept and cinema tickets being quite expensive - they will be all the more weakened by the online offer. As the arthouse cinema audience is also open to digital, more and more specialised VoD platforms are presenting a respective selected and profiled offer (such as MUBI or filmingo). Their role as "scout" and guarantor of quality becomes even more important. New forms of mediation are developing: specialised cinemas offer a common VoD infrastructure (such as Cinemalovers) for digital "cinemas"; others (such as Movic) allow to compose one's own film programme with one click and enjoy it in a neighbouring cinema within one's community. At the other end of the spectrum are the very large VoD providers, also acting as producers, whose offerings are selected by algorithms and follow exclusively a market logic.

3) Change management for festivals

The Corona pandemic has underlined the importance of the face-to-face experience, and therefore the importance of festivals as a place for socialising, exchange and networking. Some festivals have been able to reinvent themselves and have successfully developed a hybrid live and online identity, opening up new opportunities. Others have not been able to do so. This is due to the very different nature of festivals: their role towards audiences and the industry, their local or international anchoring, and their size. In 2030, festivals will have to learn to creatively manage the new relationship to mobility of its professional clientele: while face-to-face meeting spaces will still be necessary, it will not necessarily be in the same dimension, for ecological or security reasons or because of new priorities. Festivals will have to adapt their facilities and programmes to the growing offer - and with it the demand - of *extended reality*. But above all, festivals will have to face the fact that the big screen has been largely replaced by the small screens of personal devices: as VoD platforms also act as producers, films produced for the big screen will be reduced or concentrated on certain types of films.

Festivals will retain their curatorial role, providing a special experience for local audiences, and still guarantee that crucial moment of encounter between filmmaker and audience. But they will increasingly lose their former role - especially in the West - as talent scouts, *gatekeepers* in the international film circuit, and thus their exclusive role as a centre for global networking around international premieres. They will gain in importance as guardians of diversity and quality, because it is they who will in future show artistically relevant films, take risks, make selections from an extremely abundant supply. At the same time, the market - dominated by the large, highly market-oriented commercial global platforms - will focus on already established formats and content for which the audience is 'guaranteed'.

Festivals in the S/E countries are also evolving and will gain in importance at the local and regional level, as they are the focal points of an increasingly flourishing local creative industry and at the same time its impulse generators. While film consumption is generally highly individualised, festivals are gaining in importance for collective film consumption, for discussions and thus the possibility to participate in social discourse, especially in countries where access to the internet is difficult. They become thus even more interesting for Western visitors.

In addition to their usual offerings, many festivals (both Western and S/E) have their own VoD platforms, carefully tailored to the profile of their festival, in order to reach a global audience in addition to the local audience. Many festivals use these to engage and cultivate their community throughout the year. Particularly in S/E countries, this allows the local population to have access to international as well as local cinema.

If Western festivals lose their door-opening function, they will no longer carry the same importance as providers of advanced training for emerging filmmakers. In the future, other providers (local or regional festivals and training) will offer knowledge that is accessible online worldwide, inexpensive and with diverse international expertise. These providers are familiar with local or regional production and distribution conditions and can at the same time introduce their clients to the new realities of international distribution. Western professionals remain important experts.

4) The role of new audiences

The changes on the reception side are already underway and are just as important as those on the production side: films will be consumed almost exclusively on personal devices. This will be particularly true in S/E countries, where cinemas hardly exist and limited mobility often prevents participation in

festivals. In the future, film consumption will take place almost exclusively on the internet. The availability of this technology and, above all, of stable and powerful internet access will determine participation in local, regional and international film offer in the future.

The new audiences of VoD platforms are very demanding due to the multitude of options to choose from in a very wide offer. At the same time, they also influence their content. As VoD platforms depend on international revenues, they adapt their content to the interests of their consumers. Asian countries and India play an important role as film markets, and VoD platforms are increasingly investing in these and other S/E countries. With this globalisation, previous hierarchies are changing: both the supremacy of the Western film scene and the power of its players to define content and aesthetics are diminishing. The small screens of the personal devices on which films will mainly be consumed in the future will shape not only consumer habits, but also the aesthetics of films. The filmmakers of the future will have to learn to artistically manage the trend towards shorter attention spans and the multi-optional reception behaviour of film consumers.

5) Widening gaps

Although political, technological and economic developments in some S/E countries offer promising prospects for participation in international film markets, many countries will remain on the margins of these developments for a long time to come. The effects of global warming are hitting many poor countries particularly hard. Government investments are therefore primarily aimed at mitigating the effects of these challenges by providing basic aid. The “gains” of formerly achieved developments are being reduced or even wiped out. In many countries, access to training, support and technology remains available only in urban centres, which are becoming stronger at the expense of rural areas.

At the same time, censorship is increasing in some countries and mobility is restricted for political reasons. On the one hand, this means that filmmakers in some countries continue to be denied access to technology, knowledge, networks and film markets. On the other hand, it means that people in these countries are denied access to local or international film production, either because they do not have access to the internet or because certain content is blocked by governments.

5. Possible impact of trends and developments on SDC partnerships

In the following, we try to anticipate the impacts that the trends and developments identified in chapter 3 (and thus also the scenarios in chapter 4) could have on individual existing SDC partnerships in the film sector. Whether these impacts actually materialise, and to what extent, depends of course on other factors that we cannot include in our considerations. Other effects are also possible, which we do not present here. Thus, the overall picture is one that requires constant adjustment and review.

trigon-film	
Developments	Possible effects
Fewer cinemas in future	Fewer cinemas as customers for distributors
VoD channels dominate and open up the non-cinema audience for film	Potentially more audience for filmingo, strong competition for cinemas
More arthouse-specialised platforms in Europe	Strong competition for Swiss VoD (including filmingo) and the specialised cinemas
Platforms specialised in local content in S/E countries	Offer themselves as cooperation partners for local specialised platforms

Festivals with their own VoD platforms	Strong competition for filmingo and the specialised cinemas
Large platforms will also produce local content in S/E countries in future	Platform-owned S/E films can also be distributed in Switzerland without a distributor
Distribution increasingly takes place directly via non-selective (AVoD) platforms	Low-threshold distribution by the filmmaker himself possible without distributor
A trend towards diversity in the film scene	Increased interest in S/E films, but also great competition for these 'diverse' films
Massively increased film production in general	The mass further hinders the visibility of the S/E-film, the selection is very tough
Internet access determines participation at all levels in S/E: Film production, film distribution, film consumption	To reach filmmakers in these regions, local partnerships are crucial.
Open Doors Locarno	
Developments	Possible effects
Increased global online availability of education and advanced training, coaching, knowledge	Increased competition from other and especially regional providers (regional festivals, online offerings, universities etc).
Globalised film expertise: know-how is no longer predominantly North/West based.	Increased involvement of local/regional expertise and local providers possible and necessary for training of S/E filmmakers.
The Locarno Film Festival (OD is linked to it) may lose importance for the film industry due to the rise of VoD platforms but could gain relevance for the arthouse film scene.	The arthouse film scene meets in Locarno > Locarno guaranteed access to the market for OD participants and instead becomes a place of cultural and artistic exchange and joint work.
Mobility restrictions	Local partnerships are crucial to reach S/E filmmakers. Increased need for year-round online presence of OD offer.
visions sud est	
Developments	Possible effects
Cheaper production technology for independent filmmakers	Low-threshold access to production technology for a diverse S/E filmmaking scene, smaller production budgets may initially bring a certain independence from international funders, provided the material is actually available locally. However, the funds need to invest more in financing the steps necessary for quality assurance (post-production, excellent translations and subtitling).
Major platforms produce films in and for S/E in the future	Lucrative commissions for independent S/E filmmakers, cross-financing of their own independent projects becomes possible for them. International funds must adapt their criteria to the changes in the value chain.
New financing models (AVoD, crowdfunding etc.)	For filmmakers, there are more sources and forms of production financing. International funds must adapt their criteria and be able to deal with new constellations.
In certain countries, local public funds are diverted from cultural promotion, the shares for culture in development funds tend to decline	Importance of international film financing funds remains central to independent S/E film production.
Local restrictions (censorship, mobility) hamper local S/E film production	International money and co-productions can continue to make critical film productions possible.
Large amount of film productions is realised	It is very difficult for individual VSE productions to achieve visibility; specific measures are needed for S/E films.
Mobility restrictions	To reach filmmakers in these regions, local partnerships are crucial.
The internet availability decides on participation at all levels: film production, film distribution, film consumption.	To reach filmmakers in these regions, local partnerships are crucial.
FIFF, Visions du reel IKFTW, film festivals via SüdKulturFonds	
Development	Possible effects

Hybrid and year-round festival offerings emerge, increasingly become standard festival offerings	Importance of the festival moment changes; demands great additional year-round investment and know-how from festivals.
Festival-owned VoD platforms emerge	Opportunity to tap into new audiences, for educational formats, means of audience retention, also internationally.
Many films are produced for the small screen, not for the festival screen as before	Change in the programming of certain festivals that had defined their identity strongly through premieres and exclusivity.
Increased importance of festivals for arthouse film: they show curated diversity	Festivals are increasingly a place of reference and exchange for festival curators and filmmakers.
Only the big festivals can maintain their affiliated markets and industry sectors	Dwindling importance of smaller and medium-sized festivals for the industry, increasing importance as local live events
Loss of gatekeeper role due to international premieres on VoD platforms	Film industry no longer necessarily dependent on festivals
Extended Reality	New territory for festivals: a chance to reach a new audience

6. The SDC's objectives and scope for action in the light of future developments

The aim of this chapter is to examine the extent to which the current objectives of the SDC's film promotion, which are set at various levels, are sustainable in the light of the trends outlined above, or whether any adjustments might be necessary.

6.1. The SDC's overarching objectives

The SDC justifies its cultural engagement by stating that "an independent, diverse and participatory cultural sector, especially in emerging economies and fragile contexts, makes an essential contribution to the following objectives of sustainable development, democratic transition and the promotion of peace". (It is important to note that we cannot discuss the validity of this statement in the context of this evaluation.)

The impact objectives of the SDC's cultural commitments

With its cultural engagement, the SDC pursues the following 5 overarching objectives:

1. *Strengthen civil society, its participation in cultural life and in social and political processes;*
2. *Protect freedom of expression and create a favourable environment for the emergence of democratic discourse; contribute to the formation of pluralistic societies;*
3. *Promote integration and social cohesion, cultural diversity and intercultural dialogue, and respect for diversity and minorities;*
4. *Contribute to violence and conflict prevention, promote their transformation as well as post-conflict dealing with the past and individual and social stabilisation, the emergence of new ideas and access to them; strengthen self-confidence, creativity and the ability to innovate;*
5. *Strive for dignity, meaning and beauty, giving hope and building confidence in the future.*

The SDC's cultural engagement touches in particular on the following aspects of the above-mentioned 5 objectives: cultural participation (in objective 1) and freedom of expression (in objective 2), cultural diversity and intercultural dialogue (in objective 3), emergence of and access to new ideas (objective 4), striving for dignity, meaning and beauty (in objective 5).

The impact objectives of the SDC film partnerships

With regard to its film policy, the SDC mentions in the contracts with its partners the effects to be achieved in the countries of the South and East. The work of the individual partners should:

- Contribute to the strengthening of independent voices and independent works
- Contribute to the strengthening of local competences for artistic creation and education.
- Contribute to strengthening the role of filmmakers in discussions and processes relevant to civil society.
- Contribute to strengthening the further development of the independent film sector.

In our view, these objectives will remain valid in the future even in light of the trends and developments outlined above, not least because these objectives are derived from the SDC's overall strategy and can be located in the 2021-2024 strategy.

6.2. The objectives of the SDC partnerships in the cultural sector – considerations and recommendations for adjustments

The SDC formulates two key requirements for current film partnerships:

1. *Art and culture professionals from the South and East gain easier access to the Swiss cultural market and international networks.*
2. *Access to Swiss (and international) audiences is promoted, especially for cultural expressions that reflect social and developmental content.*

The question arises whether these two overarching objectives should be adapted in the light of the identified trends. These two principles are formulated in a general way and are reflected in the guidelines of the SDC in Switzerland, but they hardly refer to the impact objectives. The common approach to these issues is **enabling access**: to the market, to networks, to audiences.

Recommendation 1: We recommend that in future the impact objectives be taken into account in the formulation of the objectives of SDC partnerships.

Enabling access as a basic approach. This approach (i.e. enabling access) is based on the assumption that Switzerland (too) holds a 'key', so to speak, that supports S/E filmmakers in their efforts to become part of the existing international film market. Local but also regional ambitions of S/E filmmakers are not explicitly in the focus of the work with Swiss partners; this falls within the scope of action of the SDC's local representations in the S/E countries. However, this does not mean that the SDC Switzerland's work in the countries of origin of S/E filmmakers does not have an impact! This is what the previous evaluations of the SDC partnerships have shown.

Objective 2 defines a prioritisation of content ("especially for cultural expressions that reflect social and developmental content"). This is problematic for artistic productions if art is not to be reduced to a function as a means of information, social mobilisation or awareness-raising. It should be said that in none of the 7 film partnerships examined beforehand any artistic influence on the part of the SDC (e.g. on the choice of films or the selection of applicants) was identified, i.e. this prioritisation is not applied.

Recommendation 2: We recommend omitting the prioritisation of content in objective 2 in the future. The SDC can easily dispense with it in future, as it is rightly not practised anyway.

Shifting hierarchies and geographical focus. The objectives pursue the approach of granting S/E filmmakers access to the international film scene in Switzerland. This approach is likely to continue, because Western festivals and production companies will - as the experts agree - remain important in the international film business. At the same time, however, there are many indications that the balance will shift and that a significant creative film economy could emerge in the regions themselves, so that regional and local festivals and VoD platforms will become more important for S/E filmmakers, and access to these festivals and markets will become just as important as the expertise of S/E filmmakers. According to experts, there is a lot of potential for an economically independent film scene, especially in African S/E countries, in which local art house film and a mainstream scene mutually stimulate each other: "Africa will boost!" In the future, it will be all the more important that SDC partnerships take the potential of the local film scene into account.

Recommendation 3: We recommend formulating a third access objective that encourages SDC partners to use their work to also promote S/E filmmakers' access to the local and regional scene, i.e. to their actors, their networks and their audiences.

The trend towards new financing models and the SDC funding. Even if films can be produced more cheaply in the future thanks to new technology, financing films, especially in S/E countries, remains a major challenge. Especially since the situation in many countries by no means indicates that more local funds will be available for film promotion in the future. Films that are convincing in terms of quality will still have their price, especially if they want to hold their own internationally. It will still be crucial to make substantial funds available for production if S/E film production is to remain alive. Currently, about 1/3 of the SDC funds invested annually in film partnerships flow back to the filmmakers³². So far, enabling film productions has not been formulated as an objective per se.

Recommendation 4: We recommend that enabling the production of films be formulated as a separate objective. This would give the artistic work of S/E filmmakers a central place in the SDC's funding structure.

6.3. Further recommendations on adjustments to the SDC's film portfolio guidelines

The SDC expects its cooperation with the Locarno Film Festival, Visions du Réel Nyon, the Fribourg Film Festival, the Internationale Kurzfilmtage Winterthur, trigon-film and the visions sud est and SüdKulturFonds funds to have a positive impact in the following areas (outcomes):

1. *The level of awareness of the filmmakers is rising.*

³² From trigon-film in the form of license rights, VSE grants to S/E productions.

2. *The access to networks and international contacts is enabled.*
3. *The filmmakers can generate an income.*
4. *The artistic, technical and strategic competences of filmmakers and producers are strengthened.*
5. *A country where the conditions for the realisation and financing of arthouse films are difficult receives attention for its filmmaking in the film industry, as well as from audiences.*

In our opinion, these objectives can remain in place.

We recommend that the following aspects be taken into account in the future formulation of objectives (at outcome level, but also at output level) and in the selection of partnerships:

Digitisation at all levels. Almost all levels in the film value chain will be characterised by strong digitisation: education, production, distribution and reception. This means, on the one hand, that S/E filmmakers must have the appropriate technology and know-how at their disposal and, on the other hand, that the SDC's Swiss film partners must fully embrace this digital turn, which has long been underway, if they want to continue to be appropriate door openers for S/E filmmakers.

Recommendation 5. We recommend that digitisation be integrated on all levels in the future: in the selection of the SDC partners, in formulating of the objectives of the cooperation, and also in formulating the outcome and output objectives.

Overproduction and lack of visibility. Various factors will lead to an overproduction of films in the future and thus to a great lack of clarity in the offer, in which S/E arthouse filmmaking is in danger of being lost. In view of the shift in hierarchies and geographical focal points, and the globalisation of the film market, it should not only be about the visibility of S/E creation with a Swiss audience in the future: future partners should increasingly have the potential to reach an international (also S/E) audience.

Recommendation 6. We recommend that in future greater importance be attached to the factor of international visibility for S/E filmmaking. This is recommended both for the selection of partnerships and for the definition of objectives for the respective cooperation.

Generate income. Outcome objective 3 formulates: “the filmmakers can generate an income”. However, project funds (such as the contributions from VSE) are not income for the filmmakers in the true sense of the word, as they flow exclusively into the realisation of projects.

Recommendation 7. We recommend adding “project financing” to the term “generate income” when naming outcome objective 3.

7. Perspectives for a future film portfolio of the SDC

The following perspectives are not formulated as direct measures, but as guidelines that we recommend the SDC reflect - together with different interlocutors and in different constellations.

In many cases, we assume a need that is likely to (increasingly) arise in the future in view of trends and developments and that is significant in future funding policy. We are aware that not everything mentioned in this chapter can find its place in the SDC's film funding portfolio, but it is important to us to offer a broad panorama against which the SDC can reflect strategically.

We distinguish in the following between perspectives on the level of the instruments (we list them according to the 5 scenarios, see chapter 4), perspectives on the level of the funding approach and measures on the level of Swiss cooperation. Each of these is presented with a possible method of implementation and its explanation.

7.1. Perspectives at the level of instruments

7.1.1. Perspective of Scenario 1: Democratisation of production

The democratisation of production can succeed to the advantage of S/E filmmaking if the know-how and means of production are effectively accessible in S/E countries to the extent and quality that they guarantee the international competitiveness of the emerging film projects.

Possible measure:

Making adequate material available	➤ e.g. thanks to local "cultural offices" ³³ with rentable material, internet connection.
Developing managerial and technical expertise	➤ Provide training in management and techniques and for (co-)production. These trainings must be provided locally, the adequacy with the countries in which they apply is paramount. They can be set up through tandems with existing institutions in the West, for example. Some of the more specialised training courses can even be held in Switzerland, provided that this is administratively facilitated (e. g. VISA) and financed. ➤ Make these skills available to filmmakers, for example as a service by local festivals, or through the construction of cooperatives or other collaborative models. Support innovative models of cooperation, cooperatives or collaborative models.
Ensuring a quality that allows international diffusion	➤ Continue and strengthen the financial commitment to the production of films from S/E countries. These films will always face strong competition from Europe, the United States, Canada and China, among others, which will continue to have far greater resources than their own.

³³ With reference to the Swiss model: <https://www.kulturbuero.ch>.

Fostering autonomy in international promotion strategy	<ul style="list-style-type: none"> ➤ Provide support to filmmakers in defining a targeted distribution strategy. ➤ Enable them to finance participation in international competitions at festivals (e.g. with a dedicated fund linked to production support) as well as their promotional trips.
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7.1.2. Perspective of Scenario 2: Coexistence of cinema and VoD

The scenario of the coexistence of VoD platforms and cinemas involves risks for S/E filmmaking, but above all also opportunities - provided that S/E filmmaking succeeds in conquering a firm place on the VoD platforms (locally and internationally).

Possible measure:

Ensuring greater presence of S/E filmmaking on international VoD platforms	<ul style="list-style-type: none"> ➤ Invest in quality subtitling to have a chance at the international level. Many films fail due to lack of adequate subtitling. With the importance that streaming platforms will play, without going through other intermediaries, this element is even more important.
Supporting the existence of local VoD	<ul style="list-style-type: none"> ➤ Support a local strategy for VoD, to access local audiences. These projects are too expensive to be multiplied and compete. One strategy would be to support partnerships or networks of local actors (including festivals) around a joint VoD platform. It would also be interesting to have a strategy on licences and rights so that films are accessible not only to local audiences but also to Swiss audiences.

7.1.3. Perspective of scenario 3: Change management for festivals

In this scenario, the festivals will increasingly play the role of a relay, i.e. a hub where all actors and activities related to artistically demanding filmmaking come together. In the future, the focus will be even more on artistic discourse and networking, and less on the market and competition. This applies not only to the Western festivals, but above all to festivals in the S/E countries.

Possible measure:

Engaging in training of curators	<ul style="list-style-type: none"> ➤ For S/E festivals to be able to profile themselves accordingly and become impulse generators for their respective film scenes, they need well-trained and connected curators who can orient themselves in the mass of film productions, who can cultivate intensive professional exchange among peers and competently
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	fulfil their role as talent scouts (and talent guides). More attention should be paid to these curators. Such training is lacking and needs to be developed locally, while drawing on international expertise and know-how.
Supporting festivals	➤ Ensure that festivals can be a relay for the local scene, identify young talents and accompany them. Especially in S/E countries, supporting festivals means making a significant contribution to the dynamisation of local cultural life. Satellites or spin-offs of Swiss festivals (e.g. Open Doors) within local S/E festivals can be such a support.

7.1.4. Perspective of Scenario 4: The role of new audiences

This scenario is an opportunity for S/E films in the sense that it announces the existence of a local audience that has not existed until now. It will become decisive in the global market, and for the existence of local films and their specific content. Streaming platforms will be the main content providers for these audiences. Having specialised platforms, with artistic choices, a mediation strategy, allowing access to current but also past local film production, is all the more decisive.

Possible measure:

Keeping local distribution in mind in all funding instruments	➤ For example, ensure institutional collaboration with a local festival or a local promotion agency to promote the film.
Making the film heritage of S/E countries accessible to audiences in S/E countries	➤ Focusing not only on new films but supporting initiatives to digitise heritage that allows audiences in the countries of origin of these films to access them.

7.1.5. Perspective of Scenario 5: Widening gaps

This scenario anticipates the risks to which S/E countries in particular - and thus their cultural practitioners - are exposed in the face of global ecological and political developments. In order to enable the work of filmmakers who are restricted, for example, by repressive or discriminatory politics or the lack of state cultural funding, a special commitment is required, for example by setting a corresponding focus.

Possible measure:

Target countries are strategically chosen	➤ SDC-supported projects or partnerships could have a more focused and strategic approach concerning the country selection. The country categories in the DAC list are not relevant simply as such. While the poorest countries remain the worst off, the political and working conditions in other countries can change rapidly. On the other hand, in the future, particular attention should be paid to countries without access to the internet (or with restrictions), or to countries with repressive policies, as only international funding can make it possible for film creation to exist. To this end, it is advisable to work with pilot programmes in a few selected countries, for example. The programme should be completed with a strong local approach on the various levels (training, production, distribution, promotion, festivals) and one should search for possibilities to expand it also to remote regions.
Strengthening local festivals and cultural centres	➤ In order to create a point of reference for local filmmakers and thus grow a self-organising film scene, existing local organisations (and possibly key persons) need to be strengthened.
Developing specific instruments together with local partners	➤ Develop tools to reach and support (potential) filmmakers outside the urban centres.

7.2. Perspectives at the level of the funding approach

7.2.1. Perspective 6: Local partnership

The change in North-South hierarchies, the influence of new markets on the international scene, and the prospect of greater autonomy of distribution through streaming increase the need to relocate the responsibility for production and promotion in each country or at least region. Knowing that the SDC film promotion is steered in Switzerland and operationalised from here, we nevertheless see an opportunity in the future to put things more in the hands of S/E film exponents. Thanks to the work of the SDC partners so far, there is a great deal of know-how about the nature and exponents of the S/E film landscape.

Possible measure:

Promote tandems, Swiss-local S/E partnership or spinoff	➤ The existing (and new) CH partners can create new links thanks to their network and establish tandem formats with local S/E partners (e.g. joint applications for SDC funding) of all kinds.
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	<ul style="list-style-type: none"> ➤ Another option are satellites or spin-offs from Swiss festivals (e.g. from Open Doors) or the support of a S/E partner by a Swiss production company (comparable to the initiatives of Tom Tykwer, for example, from "ONE FINE DAY FILMS"³⁴).
Increasing exchange of expertise between organisations	<ul style="list-style-type: none"> ➤ As before, it is important to build bridges between Switzerland and S/E and between the various S/E countries, and to benefit from each other's expertise. This can take place at working meetings, in 'laboratories', in networking events (live or online), but also by making expertise available online, as a personal service (e.g. OD Consultancy) or as an online knowledge format (e.g. streaming of university content).
Promoting local and innovative cooperation models	<ul style="list-style-type: none"> ➤ Support innovative models of cooperation at local or regional level, cooperatives or collaborative models, whether at the level of filmmakers or organisations (including festivals). In the form of a fund to support cooperative projects.
Delegation of responsibility to local partners as an objective	<ul style="list-style-type: none"> ➤ For each initiative, the aim is to find a local partner organisation that can take on some of the tasks or reinforce the Swiss project leader (mandating an organisation to accompany applicants in the formulation of their projects; local scouting; partnerships with a local festival for the dissemination of the projects supported; awarding of prizes in partnership with a festival of the S/E regions, etc.).

7.2.2. Perspective 7: Local expertise

In view of this change in South-North hierarchies, which is both desired and underway, the SDC and its partners must develop an approach based on twofold expertise: an understanding of local conditions, issues, aesthetics and themes, and the know-how to access audiences and thus the international market. This plurality of experiences and perspectives is essential both in defining strategies and in implementing measures.

Possible measure:

Ensuring a diversity of perspectives	<ul style="list-style-type: none"> ➤ Ensure the perspective of the target countries in the definition of strategies
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³⁴ Cf. <https://www.onefinedayfilms.com/>. ONE FINE DAY FILM is an alternative production company founded in 2008 by German film director Tom Tykwer and Marie Steinmann Tykwer. The initial idea was to give African filmmakers an opportunity to write and produce their own stories and, under mentorship of experienced filmmakers, reach an international audience on the big cinematic screen. Until now ONE FINE DAY and their Nairobi-based partner GINGER INK successfully produced seven feature films. In cooperation with Deutsche Welle Akademie, ONE FINE DAY FILMS trained over 1000 filmmakers from 21 African countries within their workshops in all departments of the moviemaking process. This project is supported by the German Federal Ministry for Economic Cooperation and Development. See also: <https://www.onefinedayfilms.com/press>.

	<ul style="list-style-type: none"> ➤ Ensure representation of the target countries or target audience in decision-making at the level of the measures (be it at the level of project development, selection processes (juries), etc).
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7.3. Perspectives at the level of Swiss cooperation

7.3.1. Perspective 8: Swiss partnerships in transition

We assume that the existing Swiss partners of SDC film promotion will continue to play an important role in the film scene and thus remain significant partners of the SDC. New ones and others should be able to join them. Due to the developments in the film sector, the organisations will move away from their strong specialisations and diversify their functions, being more transversally active.

Possible measure:

Stimulating the interest of a growing circle of organisations	<ul style="list-style-type: none"> ➤ The SDC's commitment and the impact of its measures can be strengthened by the interest, commitment and ideas of an increasingly diverse field of professionals and organisations.
Making support flexible to adapt to rapid changes in the sector	<ul style="list-style-type: none"> ➤ It is important that the SDC keeps its own objectives (especially its outcome objectives) at the centre of its approach and sets its own expectations towards its partners. It is a question of finding a balance between benefiting from and optimising the know-how of existing partners, but also being able to adapt to changes in the sector and to new opportunities.

7.3.2. Perspective 9: Knowledge to be shared in Switzerland

The SDC partners have each built up an enormous amount of knowledge and a large network around the S/E film scene. The previous evaluations have found that, although they were all mandated by the SDC to benefit the S/E film scene, they do not share this knowledge optimally and it is difficult for others to participate: Interesting offers - not supported by the SDC - for filmmakers or organisations from S/E countries exist in Switzerland, but the organisations lack the address book to circulate the information; experiences and lessons learned are not easily accessible.

Possible measure:

Facilitating the engagement of as many Swiss exponents as possible for the benefit of S/E filmmaking	<ul style="list-style-type: none"> ➤ Together with its partners, the SDC could make the cumulated knowledge available for others. This would make it easier for other organisations and motivate them to enter this field as well.
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8. Recommendations

In this section, we answer, in the form of recommendations and with references to earlier chapters, the following three key questions of the SDC³⁵:

1. *Which changes already have or will have an impact on the film industry/film market in the future, especially also with regard to trends and developments in the field of technological possibilities, digital platforms of distribution and communication channels as well as global challenges, such as climate change (sustainable film production, restrictions on travel), pandemics, etc.?*
2. *Will the current mix of SDC approaches to film (film festivals, film distribution, a fund for the film production) reflect the changes and trends with regard to the SDC's objectives (access for artists from the South and East to the cultural market, audiences and networks)?*
3. *How should the changes in the film market be taken into account in the film portfolio in order to facilitate access for filmmakers from the South and East to the market, to audiences and to networks in the best possible way?*

8.1. What trends and developments have and will have an impact on the film industry now and in the future?

The changes taking place in the film sector are significant. The trends and changes are developed in chapters 3.1 and 3.2. Their impact has been outlined in chapter 4, in the form of hypotheses for possible developments up to 2030.

8.2. Will the current mix of approaches and partnerships reflect these trends and developments?

The SDC's current funding practice, as shown in chapter 2.3, covers a good part of the film value chain and, according to the previous evaluations, involves professional and established Swiss partner organisations with very different and diverse offers for S/E filmmakers. The decision whether or not to expand the circle of Swiss partners is fundamental for everything that follows and also influences the eventual implementation of our recommendations. The partnerships have grown over many years and have proven themselves in principle, as the earlier individual evaluations have also shown. It is therefore quite imaginable to continue the film funding in its current form, but we recommend specifying the expectations in any case (cf. recommendation 8).

Considering the trends and developments described above, we would like to briefly describe the respective opportunities and risks of continuing the current partnerships and expanding the circle of partners:

³⁵ Terms of reference for this evaluation, p. 8f.

Decision for	Opportunities	Risks
the existing circle of Swiss partners	<ul style="list-style-type: none"> ➤ Continuity and guarantee of the previous practice ➤ Optimisation and expansion of what has been established so far ➤ Security and existing basis of trust ➤ Guarantee of existing know-how and its expansion ➤ Administrative effort to the same extent as before 	<ul style="list-style-type: none"> ➤ Possibly a certain stagnation of the offer for S/E filmmakers ➤ Difficulties for the existing partners to adapt to newly defined expectations from the SDC ➤ Instability of the CH partners, who are themselves struggling with the upheaval in the film industry ➤ Accusation of "usual suspects" and disinterest of other potential CH providers ➤ Growing dependence of partners on SDC funding
the expansion of the circle of Swiss partners	<ul style="list-style-type: none"> ➤ Stronger legitimacy within the CH film industry ➤ Larger potential for ideas, resources and perspectives ➤ New approaches and formats ➤ Expanded network ➤ Expanded know-how ➤ Possible new dynamics between all SDC partners 	<ul style="list-style-type: none"> ➤ Initially more communicative and administrative effort ➤ Possibility of failure, as formats and cooperation are still untested ➤ Competitive relationship with existing partners

The ongoing and expected transformations considerably influence the role, tools and working methods of the actors in the sector, and therefore the SDC's partners, see chapters 3.3., 3.4. and 5.

We assume that even in the face of future developments, all of SDC's current partners in the film sector will play one (or more) roles, and that they will make more transversal offers.

Recommendation 8: All actors in the film industry think carefully about future developments, their impact on their activities and any overdue need for adaptation. We recommend that the SDC's future funding be aligned on a mandate strategy, specifying the objectives to be achieved, and relying less on the individual strategies of partner organisations (see 2.2.2.c).

Recommendation 9: We recommend that other organisations be given the opportunity to apply for the respective mandates - and be motivated to apply. In this way, any territorial or monopoly thinking can be counteracted. Even with all the advantages of long-standing partnerships, it is also important, especially in a small country like Switzerland, to continuously integrate expertise and network of new partners.

Recommendation 10: We recommend that the SDC take note of the list of possible measures recommended in chapters 7.2 and 7.3 and to integrate them into its future strategic thinking.

Recommendation 11: We recommend that the SDC and its partners develop an approach based on a dual expertise: a perspective and understanding of local conditions, issues and content, and Swiss know-how for accessing audiences and thus the international market. This plurality of experiences and perspectives is essential in defining the strategies of the SDC and its partner organisations, as well as in the implementation of their measures (jury, experts, etc.).

Recommendation 12: We recommend that the SDC require their partners to engage in a joint reflexion on the coordination of their various measures, their role in the value chain and the impact on the filmmakers supported (see chapter 2.3.2.).

8.3. How should the identified trends and developments be considered regarding the SDC's film portfolio?

Overall, the promotion of qualitatively convincing film production is central if S/E filmmaking is to have a chance of visibility in the expected mass of productions. Currently, about 1/3 of SDC film funds flow into production - this would still have to be verified with the partners³⁶ - and the question arises whether this will continue to be appropriate in the future, or whether production should enjoy a higher priority (as its own outcome objective), which would also be reflected in the SDC's financial investment.

Recommendation 13: The scenarios, trends and perspectives elaborated in this report can be the starting point for an intensive reflection on how best to support S/E filmmaking and redefining a strategy with corresponding (new) priorities. We recommend that the SDC hold one or more strategy workshop(s) with at least half of the participants from S/E countries and representing different stages of the film value chain. Furthermore, in addition to the current SDC film partners, other international or Swiss film professionals should also be represented.

Recommendation 14. Based on the results of these workshops, it will be necessary to assess to which extent the current focus and related financial commitments are still adequate. Indeed, within the framework of the current portfolio, according to chapter 2.2.3.d, the SDC invests about 1/3 of its support into access to the Swiss public, 1/3 into competence development and access to international markets, and 1/3 into the support for local production.

³⁶ Cf. chapter 2.2.3.d: There are no precise figures for this distribution. When it comes to production support, trigon-film is counted to return about 70% of the SDC's contribution in 2013-2019 to the filmmakers or their producers in the form of guarantees and profit-sharing, a substantial income that is often reinvested in the production. This is however not an exact value.

8.4. Further recommendation

A final, general remark concerns the SDC's objectives for its portfolio. They are formulated in an open manner and, in principle, allow to take into account most future developments. Slight adjustments to some of the objectives could help to clarify or prioritise certain aspects, or even enhance them.

Recommendation 15: We recommend that the SDC take note of recommendations 1 to 7 in chapter 6.2 and 6.3.