

THINK TANK

THESSALONIKI
FF GR
FILM FESTIVAL

Shaping the Film Markets of Tomorrow



IN PARTNERSHIP WITH



IN COLLABORATION WITH

THE CATALYSTS
AGENCY FOR INNOVATIVE & CREATIVE PLAYERS

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Health crisis, war, inflation, energy crisis, climate change, digitalization, audience shift, platforms thriving, AI. **The list of technological, economic and societal changes impacting the global audiovisual industry has been growing for about ten years.** It escalated with the COVID crisis, pushing every sector of the industry to adapt at a breakneck pace. At the same time, our industry lives to the rhythm of societal changes, taking up the challenges of inclusion, accessibility and sustainability. **Taken individually, these changes are major, taken as a whole, they engage the sector in a systemic revolution throughout the whole value chain.**

The Film Markets, not to be outdone, are adapting, anticipating and initiating. To question ourselves has always been part of our daily lives. With the COVID crisis and the acceleration of initiatives taken urgently and without visibility, the markets have come together by exchanging good practices, tips and sharing their concerns and doubts. All in an informal format.



At the Thessaloniki Film Festival, caught up in the whirlwind of transitions and adjustments, we promised ourselves to **take the time to reflect** once we turned the page on the pandemic. We wanted to engage in this reflection with our colleagues from the audiovisual market to continue the precious fraternal dialogue initiated during the pandemic. The immediate support we received from Berlinale's European Film Market and the Cannes Marché du Film, the enthusiastic and dynamic collaboration with The Catalysts and AC Coppins, as well as the willing participation of our colleagues, **proves that this solidarity, this community is not just a pipe dream.**

We have chosen to focus on European Film Markets because, although national and regional situations are heterogeneous, **all European Film Markets evolve in an ecosystem that facilitates dialogue thanks to common cultural, structural and economic references**, a legacy of the ambitious European Cultural project of the European Commission, carried by the Creative Europe programme for more than 30 years.



Think Tanks Launch

With this in mind, and in order to move forward with an informed action plan, on November 5 2022, the Thessaloniki Film Festival launched a series of three Think Tanks in partnership with Berlin's European Film Market (EFM) and Cannes' Marché du Film (MdF) to bring together key stakeholders for a visionary reflection around the future of film markets as institutions and major players of the industry ecosystem. All Think Tanks were prepared together with The Catalysts Agency team and moderated by AC Coppens.





Think Tanks Launch

The goal is to detect relevant topics of concern, discuss upcoming challenges, and encourage an open conversation and mutual support with other European Film Markets, covering the entire scope of markets from smaller up to large scale organisations, willing to openly ask: **What does an economically, ecologically and socially sustainable future of Film Markets look like?** The two first Think Tanks were open to professionals from all different sectors and users of the Film Markets such as film market organisers, producers, filmmakers, training workshop organisers, professional associations, sales agents, distributors and more, to share and exchange views. In the third Think Tank, which was dedicated only to film market organisers, financial sustainability was discussed. Overall more than **100 professionals** participated in all three Think Tanks.

Think Tank #1

Weaving the Market Fabric

February 21, 2023





The series kicked off at the EFM of the 73rd Berlinale where more than 45 industry professionals attended the first session. **That showed the interest and relevance of the Think Tank. The**

session was all about what makes up the substance of the Markets, that is, "contents" offered by the markets: Which topics need to be addressed and offered by film markets to



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actively involve professionals and support them in their next steps? Which themes, subjects, discussions, are the most useful to nurture and guide the entire ecosystem? What do we keep? What

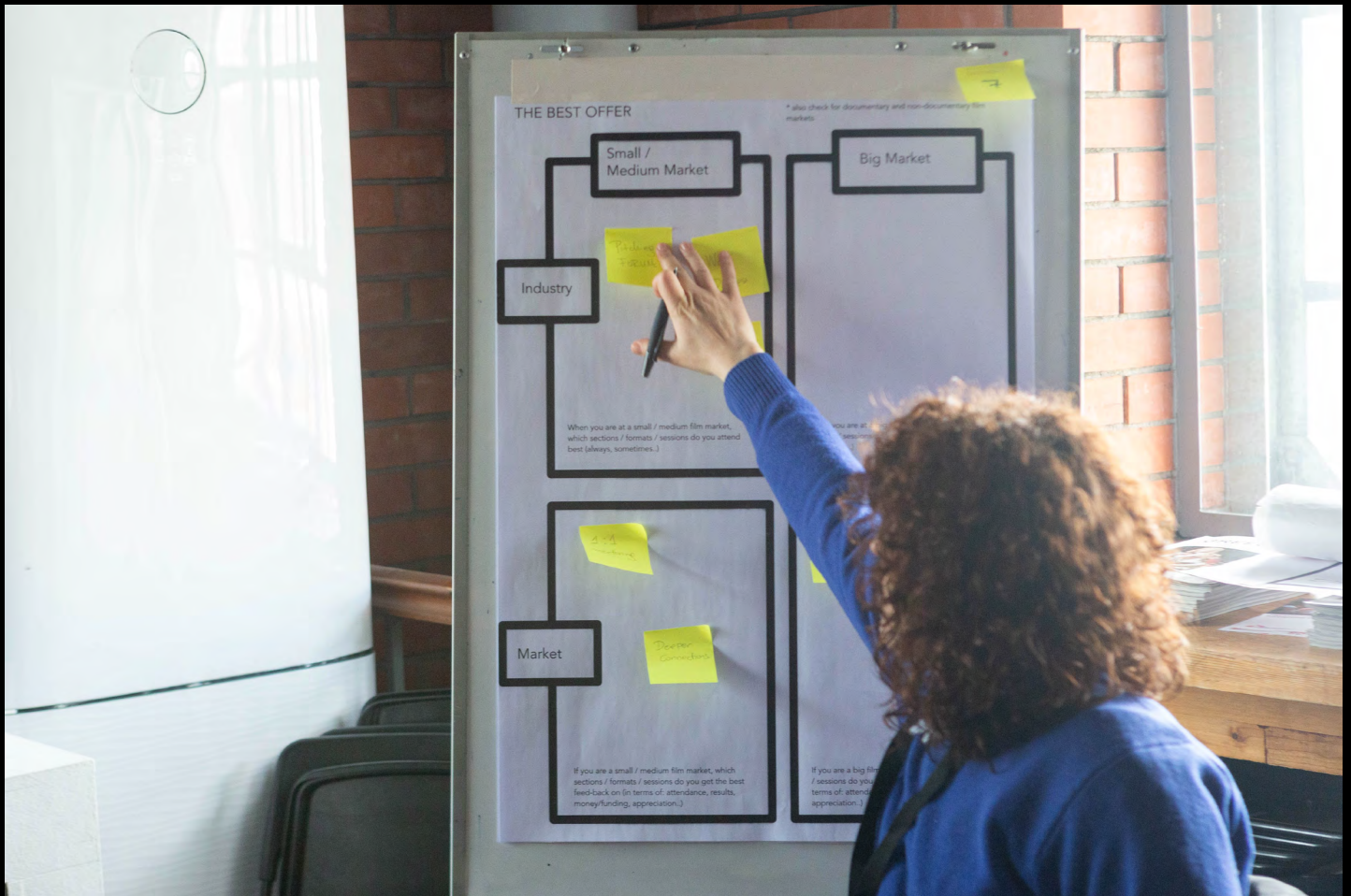
needs to be changed? As the EFM offers a broad range of topics, giving a lot of insights for producers, it was certainly an excellent place to discuss the substance of a market.

Think Tank #2

Modelling the Market Shape

March 7, 2023





The second Think Tank was organised in a hybrid format (onsite but also online) during the Thessaloniki International Documentary Festival's AGORA and for that

reason we had over 50 participants. The **Think Tank** was dedicated to the **Market** formats: Offline, Online, Hybrid, Exhibition Floors, Panels, Workshops, Pitching



Presentations, Networking and Venues. What are the sections, formats and types of sessions industry professionals need in order to collaborate better and make successful business?

How will the Markets “shape” their physical and digital formats in the future, as a place of knowledge exchange, a marketplace to close deals and expand networks?

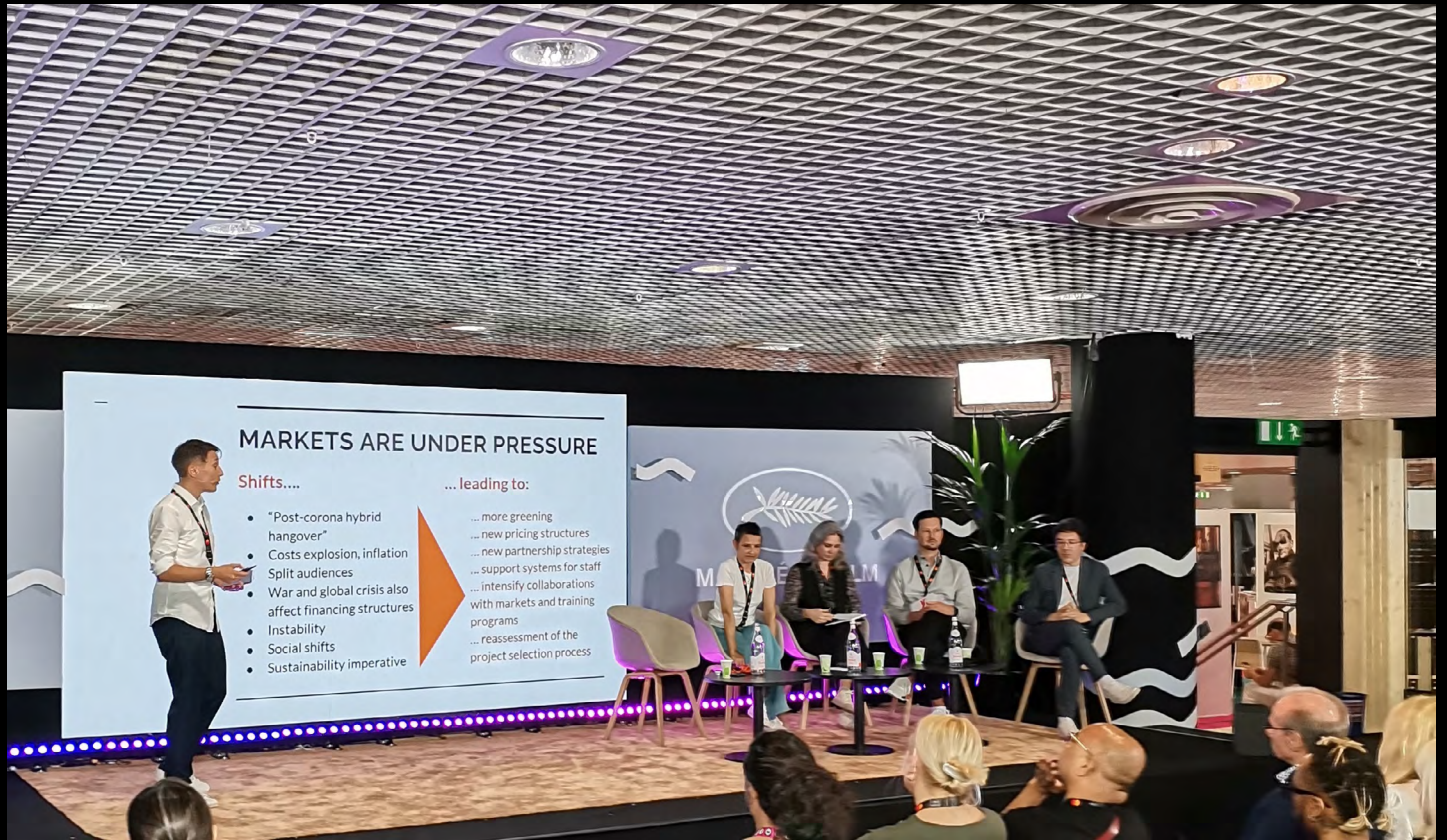
Think Tank #3

Financing the Market Place

May 18, 2023



The third and last Think Tank took place in Cannes during the Marché du Film, the place to be for all Markets to **discuss business models, public and private funding, partnerships, sponsorships and funding at large**: What are the possible new business models for Film Markets in the future? We also considered here the questions of expenses in a challenging economic context and the cost of potential growth. The Think Tank was open only to Film Market organisers and around 20 Film Markets participated.



Think Tank REPORT



This report is not a study based on figures. It is a grassroots approach based on the experience and analysis of professionals who share their expertise, whether convergent or divergent.

The Film Markets that have participated in all or some of the three Think Tanks are the following: AGORA - Thessaloniki Film & Documentary International Festivals, Marché du Film - Cannes FF, European Film Market - Berlinale, Venice Production Bridge - Venice FF, KVIFF Eastern Promises, San Sebastian Industria, IFFR Pro, Locarno Pro, Les Arcs - Industry Village, Industry@ Tallinn & Baltic Event, Cinelink Industry Days - Sarajevo FF, When East Meets West - Trieste FF, MIFA - Annecy Animation FF, Visions du Réel Industry, CPH:DOX Industry, IDFA Markets, DOK Leipzig, Baltic Sea Docs, Sofia Meetings - Sofia FF, MIA Market, Göteborg Film Festival Industry, Connecting Cottbus - Cottbus FF, DOK.fest München Industry, Glasgow Film Festival Industry. We want to thank them for their extrovert attitude and contribution to the Think Tanks.



Based on the discussions and ideas exchanged during the three (3) Think Tanks, which were sometimes contradictory, often introspective but always constructive, we have drawn up an inventory of the current situation, diagnosed the challenges facing the industry and we are exploring the best ways to tackle them.

We have listened to the comments and advice of our industry colleagues and incorporated them into this report. We have synthesised and re-organised all the material extracted from the three Think Tanks to structure our report around the reflections and perspectives that we felt were most important, either because they were shared by all the participants, or because they underlay and run throughout the three (3) sessions.



FACTS



01



People make business

To meet people in real life is the number one reason to attend a Film Market (and the events beyond the market itself). Keeping up with the existing network, keeping up with trends - and possibly to watch films. Making business happens everywhere. **We can't split business from networking, especially when networking often takes place 24 hours a day, from the breakfast buffet until the end of the evening.**

Follow ups are a year-long activity and physical markets offer the best

environment to meet in person. Industry professionals made a point of highlighting that networking sessions and opportunities are primordial IRL (interactive formats) whereas online is convenient when there is no need to be seen yourself: rather to catch up on some content sessions in replay/VoD (passive formats). They also stressed how very many "immersive" formats come back to IRL and one in particular said **"Serendipity is the magic of our markets, without serendipity, we don't exist"**.

02



Markets are Networks

Markets are picked depending on their specialisation and ability to answer the needs of the professionals. Big markets like Cannes Marché du Film or Berlinale EFM are a must to sell, buy, socialise and solidify the network. Smaller and medium Film Markets and industry events are essential for projects and long term bonds. For emerging producers and filmmakers, they facilitate the building of their network in a safe but professional environment.

This point is particularly crucial considering **the**

industry's strong demand for more inclusion and accessibility. But also because the Film Markets respond more or less to two European imperatives: **diversity and competitiveness.** These two imperatives/injunctions are sometimes difficult to reconcile on the scale of a territory or a market but they fit together perfectly on the scale of the continent.

More specifically:
Geographically, market sizes and activities are organically linked to the size of their national and regional industry.

02



Markets are Networks

It goes without saying that the major markets have developed into **major audiovisual production and distribution regions**. Highly populated, industrially developed regions, located in the centre of Europe and connected to each other. **These markets are strategic crossroads for commercial deals but also for global networking. They are essential instruments for the economic competitiveness of European industry.**

Market's diversity, however, allows countries that are geographically out of the way -with respect to the centre of

Europe- to **offer a gateway to European industry for professionals from the region and to guarantee visibility for their works.** The diversity of the Film Markets de-compartmentalizes European industries and brings the margins closer to the centre of Europe.

From a generational point of view, **small and medium-sized Film Markets are gateways for newcomers, essential to ensure the generational renewal of creative actors in Europe so that the industry remains dynamic and connected with an ever-changing audience.**

03



Markets are under pressure

Shifts are recognized as post-corona hybrid hangover: costs explosion, inflation, split audiences, war and global crisis affect financing structures, cause instability, social shifts and demand the sustainability strategy imperative. Together with the ongoing ecological crisis lead to greener practices, new pricing structures, new partnership strategies, support systems for staff, intensified collaborations with other Film Markets and training programs and reassessment of the projects' selection process.

All of the above **need and**

deserve new training and coaching for administration and staff members, which leads to additional costs on the annual budget. In regards to the ecological sustainability imperative, a green parallel economy is taking shape within the film industry ecosystem and is profiting from the creative economy whereas Film Markets and Non-profit organisations are not taken into account within this ecosystem although they invest into and pay for green services and practices (green activities, consultants, certifications etc) having an impact on the budget.

BOLD Requirements



01

Break the
power
structures!



Share and re-distribute the power to **“minorities actually being global majorities”**. Diversity, accessibility and inclusion are key to make this happen. Film Markets need to be more inclusive and offer access to valuable information and contacts, specifically to the younger generations. This will have an effect on the final contents and the audience reach. Some industry participants also commented on the constantly present triangle of capitalism, racism and patriarchy: **“It is an omnipresent reality. We need to seek accountability for these malign behaviours in the film industry and gradually erase them from the picture”**. This has to be linked to **the necessity of diversifying the offer of films in order to access a more disrupted and segmented audience.**

The participants stressed the importance of giving better access to Film Markets for future generations, as well as places of networking, information and intelligence exchange. One of the main topics of the conversation was **Film Markets as a place of nurturing and exchange, and participants stressed the importance of finding ways to give space and access for different stakeholders - specifically for the younger generation.**

02

Green,
Greener,
the Greenest



Sustainability is an imperative and more obligations are to come. There is a double standard on sustainability: the need to travel less for green sustainability and more access for social sustainability. How can we make them compatible without the easy digital solution which might marginalise and discriminate further the new-comers who do not yet have a network allowing them to easily navigate a digital event? Certainly not by shifting the markets online (a digitization whose environmental impact is also difficult to assess).

A person's hand is visible in the foreground, holding a smartphone horizontally. The phone's screen shows a brightly lit theater with an audience seated in rows, facing a stage with a large screen. The background is dark and out of focus, showing the back of a person's head and glasses. The overall lighting is warm and focused on the phone's screen.

KEY Takeaways

01

Youth to the Front! Supporting generation changes

Because we are talking about the future of Film Markets. We need to start with the diverse youth! Building the future is building for the next generation. **More inclusive events and integration of young professionals is the smart thing to do.**

Most markets have already embarked on this essential path for years, but it seems, in view of the reflections of our industry colleagues who participated in the first two think tanks, that the efforts are not enough or at least, did not yield results that met their expectations.






SOME SOLUTIONS

- > Cross-generation exchange: guidance, mentoring, support, curated 1-on-1 meetings are a few examples.
 - > Scouting (diverse!) talent (anonymity in project selection could for instance avoid the usual conscious or unconscious biases), take more risks.
 - > Training and networking should not be separated from other aspects of the market. All market participants should have equal access to networking opportunities and training participants should be able to take advantage of all market aspects. This means integration in the market schedule and access to networking tools.
-

02

Changing power-structures and building access

Market participants were very vocal concerning diversity and accessibility with constructive feedback. **The need for less conservatism in the marketplace and the need for transformation and sharing of power** by welcoming more groups traditionally viewed as minorities which are actually the “global majorities” was highlighted. The question of who is paying and who is offered a free accreditation was a major focal point of discussion as well as pricing and affordability for different groups such as junior professionals vs. established professionals, high capacity AV countries vs. low capacity AV countries and what each and everyone can offer to or take away from the Film Market. 



SOME CHANGES

- > **Diversify!** Look for and support different voices. Collaborate with organisations who have access to them. Select jury members from different backgrounds, ethnicities, professions and genders.
- > **Accessibility** to all industry professionals from all aspects of the film industry.
- > **Adapt the fees** - Adjust pricing accordingly so as to be more affordable for more professionals. This question is delicate because every Film Market is based on services which are up to each one of them to assess and monetize and establish its unique business model. But it is undoubtedly possible to provide answers to this obstacle: The issue of accreditation pricing was raised from Market participants in regards to market and industry events accessibility.





> **Question the current pitching formats** and reinvent the pitching sessions. Pitching sessions are often overwhelming for the participants but many times fruitful for a project to be able to pitch in a room full of professionals. We should revisit the power dynamics the pitching formats create and bring them on an even level. The description of film professionals with the term “decision makers” should also be re-thought as it burdens the interaction with unnecessary stress while it immediately puts the project holders in a fragile state.

> **Diversity within the market teams** themselves! If gender parity and non-discrimination of LGBTQ+ employees have been at the centre of efforts and attention and are on good track, this issue remains relevant as well as for other visible and invisible minorities. Nevertheless, Film Market stakeholders should bear in mind that minorities have different faces in each country and that we must avoid projecting our own minorities onto other countries.

03

Truly Hybrid: Intertwining the Real and the Virtual

How to keep the benefits of online without having detrimental effects: fatigue and digital weariness from over exposure and easy access to online markets and events, de-motivation, lack of commitment, discrimination of new entrants, risk of losing attractiveness compared to markets that have returned entirely to physical format. **Both the Film Markets and the professionals have insisted on the importance of the digitalization to be used for complementarity/consecutiveness instead of simultaneity/substitution of the physical events.**





SOME USEFUL USAGE OF THE ONLINE ENVIRONMENT

- > Enhancing onsite activities with online preparation
 - > On site/ offsite and hybrid matchmaking
 - > Interactive formats also online
 - > Decongest with **pre- / post- online events** to nurture the bonds and the business flow
 - > Year-long VoD offer of industry talks. Digital makes it possible to increase the visibility of on-site activities.
-

04

Balancing Well-being vs. Speed

Over the years, many Film Markets have grown and added industry activities in order to support the film industry in every possible way. This led to higher competitive efforts between Film Markets. Nowadays, depending on their size and professional participation, Film Markets may be described as overwhelming and hectic for the users. For the organisers, digitization has added another layer of production work pressing for better results and better participation. This led to intel exchange and communication.





SOME RAISED ISSUES FROM PARTICIPANTS AND ORGANISERS

- > Rushed programs, “too much happening”, not enough time, a lot of last minute issues.
 - > Health issues linked to huge workloads and disproportionately low remuneration.
 - > Need for more quiet spaces.
 - > Fair pay - also for their own staff!
 - > Re-define growth as an option.
-

05

Embracing the Greening Imperative Costs

As event organisers and cultural actors, film festivals have a responsibility to sensitise the audience and professionals on social issues. Climate change has become the most important challenge of our society, and it leads us to change our practices in order to lower the impact on the environment of Film Festivals and Film Markets we organise. To do so, we need to hire dedicated personnel, to consult, implement, report and evaluate our efforts towards greener events and to obtain green certificates for physical events as per the Creative's Europe mandate.



BRIEF OVERVIEW OF ISSUES



- > The Intention, guidelines, obligations and new coming standards are welcome! Examples of Green activities to raise awareness and become more sustainable already exist. A dedicated online database was launched in 2022 by Festival Network MIOB on which festivals signed up for the Green Charter to record their consumption of food, waste, energy and transport. As of December 2022, 38 festivals were in the process of recording their consumption, four festivals have recorded data for one edition and another 50 festivals have said they are interested in signing up. In addition, Swiss film festivals want to join forces to create a platform that allows them to calculate and lower the carbon footprint.
- > However, it is hard to monetize green actions and policies as markets, although we are supporting the growth of the green economy, markets are yet to have extra funding for these actions.
- > Sufficient data to showcase the economic value of green actions are not available yet.

06

Navigating uncertainties for Funding

Participants discussed the geopolitical situation pointing at key changes that happened in the last years, which include the post-corona hybridity, the war, the inflation caused by the war, the global crisis affecting financing structures, the greening activities and costs, the social shifts.





SOME SOLUTIONS

- > Plan earlier to react to last minute decision making.
 - > Have a "Plan B" to minimise funding related risks or sudden political agenda changes.
 - > Approach multi-annual funding plans as much as possible.
-

07

Finding new sources of financing?

Participants noted that with the rising inflation public money will be scarce and the cost of living for professionals (especially freelancers) is increasing. There are less flights from and to some destinations and the war impacts the general situation, in some regions more than others. It is important to stress that the situation varies depending on the regions: while in some places the budget is increasing every year, in others the impact of inflation is not reflected in the budgets yet. While it is easier to travel to some central European countries, Film Markets around the European borders have to make extra efforts to bring professionals to their cities finding other unique added values to offer.





SOME IDEAS

- > Dynamics between Festivals and Markets - to be bound. Citizens and authorities recognize a Film Festival but do not realise what a Film Market is and how much income and visibility the Film Markets bring to the local community.
 - > Involve more local partners, institutions or sponsors with more awareness for the Film Market impact.
 - > Attracting new partners with more specific programs around the Film Market core.
 - > Possibly also introduce common international "technical / logistical" partners to approach.
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08

To Fee or not to Fee? Accreditation prices in focus!

As the film industry is a place of constant growth and content monetization, the main problem that has been pinpointed is that everyone is looking for free of charge attendance. Prices often vary between totally free and higher rates representing significant financial efforts. Nobody wants to pay, and the industry experts expect to be invited for free. However, in many cases markets offer to the invited industry professionals free accreditation and cover travel expenses and accommodation allowing them to make their business in the hopes they will network and offer support to the selected projects / participants. To be more inclusive, a market has to be accessible to established and emerging professionals and adjust the pricing accordingly.





SOME FACTS

- > Everyone likes to be invited :-) and many markets have guests for free.
- > Financial accessibility: accreditation prices have become higher, but access is limited.
- > The real cost of the Film Market's offerings and services to attendees cannot be compensated by the price of the accreditation fees.
- > A minimum administration & sustainability fee should be established and charged to all.
- > Discounts must be regarded as investments towards the professionals who receive them.
- > There is a need for a clear pricing structure: fair "dispatch" or solutions to sponsor juniors, specific fees for online, invitation policies, etc.
- > There are small, mid sized and larger scale film markets. Their pricing varies accordingly as some of these -larger scale ones in particular- rely on the monetization of their services for revenue and therefore making it harder for them to reduce prices and offer a wider variety of discounts.

09

If it's too much, why do we have to grow?

As finance is shrinking for most, Film Markets need to do more for less. Participants discussed downsizing markets, keeping more exclusivity, prioritising quality vs quantity by keeping a fixed number of accreditations. This requires hiring staff to assess these applications and create a selective system. Reducing the amount would allow a more relaxed pace that could help support newcomers to the industry. Others decided to offer more free accreditations to junior professionals already selected from other markets, to give access and networking possibilities. Some markets decided to be solely physical, others to cancel their industry talks / panels because their festival already has established and industry related conferences.





SOME KEY FACTORS

- > Why do more for less, if funding is shrinking?
 - > Focus on core Film Market activities.
 - > Integrate further the activities and expertise developed by already existing European organisations, associations and training programs.
 - > Slowing down the pace will create better access for newcomers.
 - > Maximising accreditations numbers does not guarantee inclusivity and raises the costs for evaluation and admittance processes.
 - > Do not increase the number of projects, but diversify them and support them at key stages of their development on circuits of markets identified as being specifically complementary.
-

10

Fostering Peer Collaboration(s) between Markets

Dialogue and transparency are important for the future of Film Markets. It is clear that there is a tremendous need to discuss and brainstorm on emerging ideas, to fulfil the Film Market's future mission with a vision created together.





SOME IDEAS

- > Create more cooperation opportunities between markets while maintaining their character and diversity.
 - > Share best practices and always keep a **dialogue channel open.**
 - > Tighter exchange with exhibitors and professionals who work with audiences.
-

CON
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SION



There are no easy answers for all issues discussed in the frame of the Think Tank. However, some initiatives are already being formulated between Film Markets and are to be implemented soon.

Towards a Guild / “Film Markets Coalition”?
The Film Markets discussed

a possible coalition between them, with the aim to collaborate and exchange information, solutions and ideas. The goal would be to meet twice per year and put forward solutions. If the exact format of this coalition has not yet been decided, setting up coordination and a common representation seems more than urgent.



01

External work

Lobbying and steady communication with external partners and institutions.

Internal Collaboration

- > Coordination.
 - > Sharing Resources.
 - > Create a Virtual Space / VoD Library of Industry Talks, Conferences and Masterclasses. (considering the IP rights and accessibility to the platform).
 - > Research to gap the lack of economic data.
 - > Expertise, Training & Consultancy.
-

02

Further Common Exploration Paths and Ideas

Most Film Markets have already established collaborations between them. They have identified other Film Markets which suit their agenda and can be complementary for information exchange, project exchange, circulation of talents, they give awards for further networking opportunities, collaborate on workshops and industry talks/panels, accreditation exchange between Film Market representatives, ad swaps in their catalogues, announce each other's call on social media, promotion of completed films in each other's video libraries for further visibility and much more. →



Markets are already forming organically and dynamically networks of cooperation according to their needs for sustainability and growth. Most of them already belong to several different, more or less formalised, overlapping collaborative networks. These co-operations are flexible and evolve very quickly according to the needs of the industry. Therefore, it is important not to rigidify them at a time when extraordinary flexibility and rapid change are essential and to protect their dynamism, flexibility, diversity and resilience.

More systematic collaborations have been already set up by several markets and are now being explored further, keeping in mind once again that these collaborations must remain flexible, organic and non exclusive.

Some initiatives being already discussed:

- > **Accreditations for multiple markets.**
- > **Content Platform Solutions.**
- > **Curated year-long, transversal Film Market Journeys.**
- > **Further Dialogue.**
- > **Maintain and expand solidarity** between Film Markets and industry events.
- > **Collective training about sustainability** (economical, ecological and social).
- > **Remain networking hubs, each with its unique content, distinctive character and identity.**



WATCH



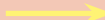
Live Presentation
of Think Tank
Results

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