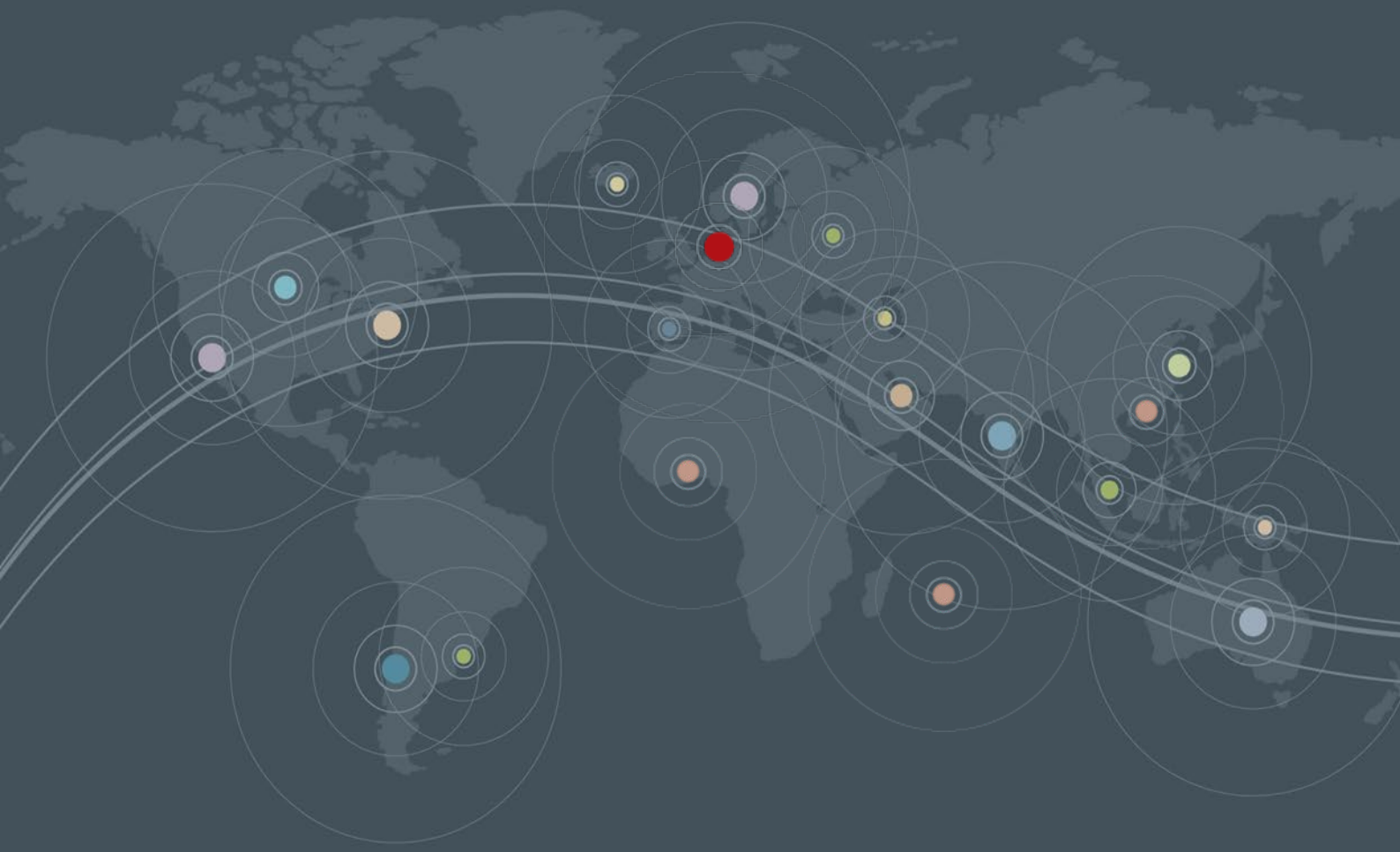
International Benchmark Study

Report to the **Netherlands Film Fund** by Olsberg•SPI



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Chapter 1:
Executive Summary

Credit: Set still of *My Extraordinary Summer with Tess*, Copyright BIND, Bert Nijman

1. EXECUTIVE SUMMARY

1.1. Study Overview

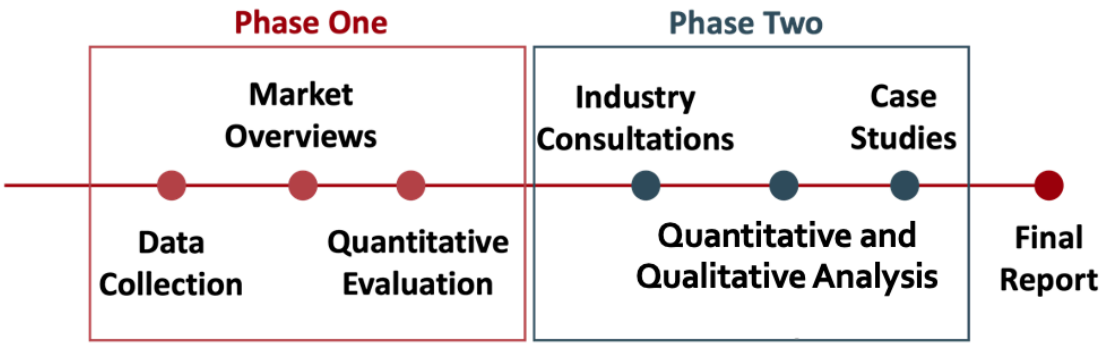
The Netherlands Film Fund seeks to support and strengthen the Dutch film sector. There is an impression that Dutch features are not performing to their fullest potential and this study was primarily aimed at gathering quantitative evidence around this impression.

The study also explores the degree to which Dutch features are matching the levels of success found in films from other, comparable European jurisdictions.

Olsberg SPI (SPI) was commissioned by the **Netherlands Film Fund** (FF) to conduct an evaluation and analysis of the status of Dutch feature films benchmarked against the output of feature films from comparable European countries.

The study has been divided into two phases. The following Figure 1 summarises the process of the study through these two phases:

Figure 1 – International Benchmark Study Process



Phase One is quantitative focused, with the intention to establish a standardised benchmark of film performance across the five comparable European countries identified – being **Denmark, Sweden, Belgium, Austria** and **the Netherlands.**

Phase Two is qualitative based, in order to build an understanding of some of the factors that explain the results of Phase One. It in part involved engaging with key industry stakeholders (including producers, directors, distributors, sales agents, festival personnel and key industry body's representatives). This second phase also involved analysing three films that were examples of high-performing feature films from the first phase of processing High Excellence films[1] (the films being *Brimstone*, *Druk* and *Girl*). These three films were used as case studies to further unpack the range of elements that come together to result in a high performing film, and to feed into the final key findings and insights.

1.2. Phase One: Market Overview

The main objective of Phase One is to benchmark the Netherlands against the other comparable European countries. SPI first set out to contextualise each country by reviewing key aspects of the film and television production markets, such as evidence for recurring talent, the roles of the main film funding bodies, and key legislative frameworks supporting the sector, including any film production incentive active in the nation.

This process demonstrated that the chosen countries do have similar market conditions and are thus reasonable comparators from which to establish a benchmark. In all the five countries

[1] The High Excellence lens was developed to establish a quantitative baseline of both artistic and commercial success, further explained in Chapter 4

considered, there are public policies in place to support the sector, with film funds acting broadly similarly – i.e., supporting filmmakers from creation, to production, to distribution. The countries also have additional public and private film funding opportunities and have festivals and film schools that support the sector. The output of feature films and subsequent national and international recognition differs, so too does the commercial performance of the five countries' films. This was further detailed and analysed through the benchmarking process.

1.3. Phase One: The Benchmarking Process

When considering the process and metrics needed for benchmarking, box office admissions were initially identified as the primary lens for analysis of performance as they are often used in the reporting of a film's success. The first analysis looked at feature films from each country with a minimum European admissions total of 250,000 for the period of the study (2010-2022). The admissions threshold as well as the time period was chosen in discussion with the client with the objective of capturing a wide range of feature films demonstrating varying performance levels.

The top twenty films that met that criteria, during the period, were then further analysed to identify those that received key festival and/or industry award recognition. A majority of the films listed in the Top 20 analysis were highly commercial and this did not provide a full picture of the overall artistic performance of each countries' output, so a secondary lens was developed – termed ***High Excellence*** (*see Chapter 4 for a full summary of the High Excellence parameters and how the parameters were applied.*

The High Excellence lens was developed to establish a quantitative baseline of both artistic and commercial success. The parameters for a film to be considered were as follows:

Table 1 - High Excellence Parameters

High Excellence Data Parameters	
Production Format	Films (scripted feature films only)
Time Period	2010 to 2022
Production Origin	100% National production or Majority co-productions
Artistic Recognition	Films selected for or awarded in the main competition categories[2] for one of the four noted festivals (Cannes, Berlinale, Venice and Sundance) And/or Films that were nominated for or awarded a major award category in the European Film Awards and the Academy Awards
Market Recognition	Films that have reached or exceeded European admissions of 250,000

[2] This only considered films that were selected and/or won for the main competition or equivalent, with some inclusions for significant wins in major festival categories (such as Directors' Fortnight). With both the awards, only films that were officially selected and nominated and/or won for the main best feature or best international feature were considered.

The analysis using these two lenses resulted in a robust data matrix. This included the High Excellence list of films as well as the films that were considered for the Top 20 analysis but did not necessarily meet the Artistic Recognition lens. Table 2 is the summary of the results of the benchmarking across the matrixes for the five countries. *The full High Excellence matrix for each country is detailed in Appendix 1*.

Table 2 - Summary of High Excellence Matrix Results[3]

High Excellence Matrix Results					
	Denmark	**Sweden**	**Belgium**	**Austria**	**Netherlands**
Films that **met High Excellence Parameters**	14	10	11	5	0
Total Feature Films **Produced Between 2010-2022**	272	360	264	204	487
Total **Selections and Nominations** for Key Films and Award Events	17	12	21	8	0
Total **Wins and Awards** for Key Films and Award Events	7	10	3	1	0
Total **European Admissions** (millions) of High Excellence Films	16.5	15.6	9.6	1.9	0
Directors Recurring in the High Excellence Matrix	**Thomas Vinterberg** – 3 films, **Lars von Trier** – 4 films, **Susanne Bier** – 2 films	**Ruben Östlund** – 2 films	**Luc and Jean-Pierre Dardenne** – 4 films	**No repeat directors**	**No repeat directors**

Source: Olsberg SPI

As shown above, **no** Dutch feature films met the High Excellence parameters of both Artistic recognition **and** Market recognition.

The closest Dutch film to meeting the parameters is *Brimstone* (a feature film directed by Martin Koolhoven, produced in 2016), with 238,488 European Admissions and a competition selection for the Venice Film Festival. *The findings from the High Excellence Matrix are further detailed in Chapter 4*.

1.4. Phase Two: Case Studies and Consultations

[3] All markets' figures sourced from The European Observatory's publications of Focus (Editions for 2013, 2016, 2020 and 2023). The Netherlands figures: Netherlands Film Fund

Phase Two was a qualitative-driven analysis, focusing solely on Dutch films, involving further desk research, plus conducting consultations and engaging with key industry stakeholders to unpack the challenges facing the Dutch industry as well as the potential opportunities to be leveraged.

This phase also involved building out three case studies based on three high performing feature films identified through the first phase's benchmark process (being *Brimstone, Girl* and *Druk*) to evaluate the influencing factors behind real-world examples of high performing Dutch majority and minority co-productions. This collectively came together to build out the key findings of the study.

1.5. Phase Two: Key Findings

The initial stages of Phase Two resulted insight and feedback to measure against the Phase One findings.

In compiling the quantitative and qualitative information gathered across both phases, the following five key findings were identified (*these findings are further explained in Chapter 6*):

Genre and identity

The popularity of film genres and their influence on the level and the type of success highlights the ongoing friction between arthouse and commercial films.

This split between arthouse and commercial is clearly illustrated by the Dutch output of feature films including mostly market-centric films but few films garnering high levels of artistic recognition.

Support and sustaining creative talent

The talent driving a project is a key influencing factor in the potential success of a film.

The Netherlands has produced notable directorial names over the past decade and the pool continues to show promise, however these creatives come up against more challenges than those from the comparable countries stunting the potential for sustained development and limiting the pipeline of talent.

Prioritising quality over quantity

Countries such as Denmark and Belgium are producing just over half the amount films that the Netherlands are year-on-year but, considering the High Excellence benchmarking as a metric of cumulative performance, the Danish and Belgium markets are showing a higher quality, more successful films.

The Netherlands has a significantly high output of feature films, the most in comparison to the other four comparable markets analysed in this study.

The value of co-productions

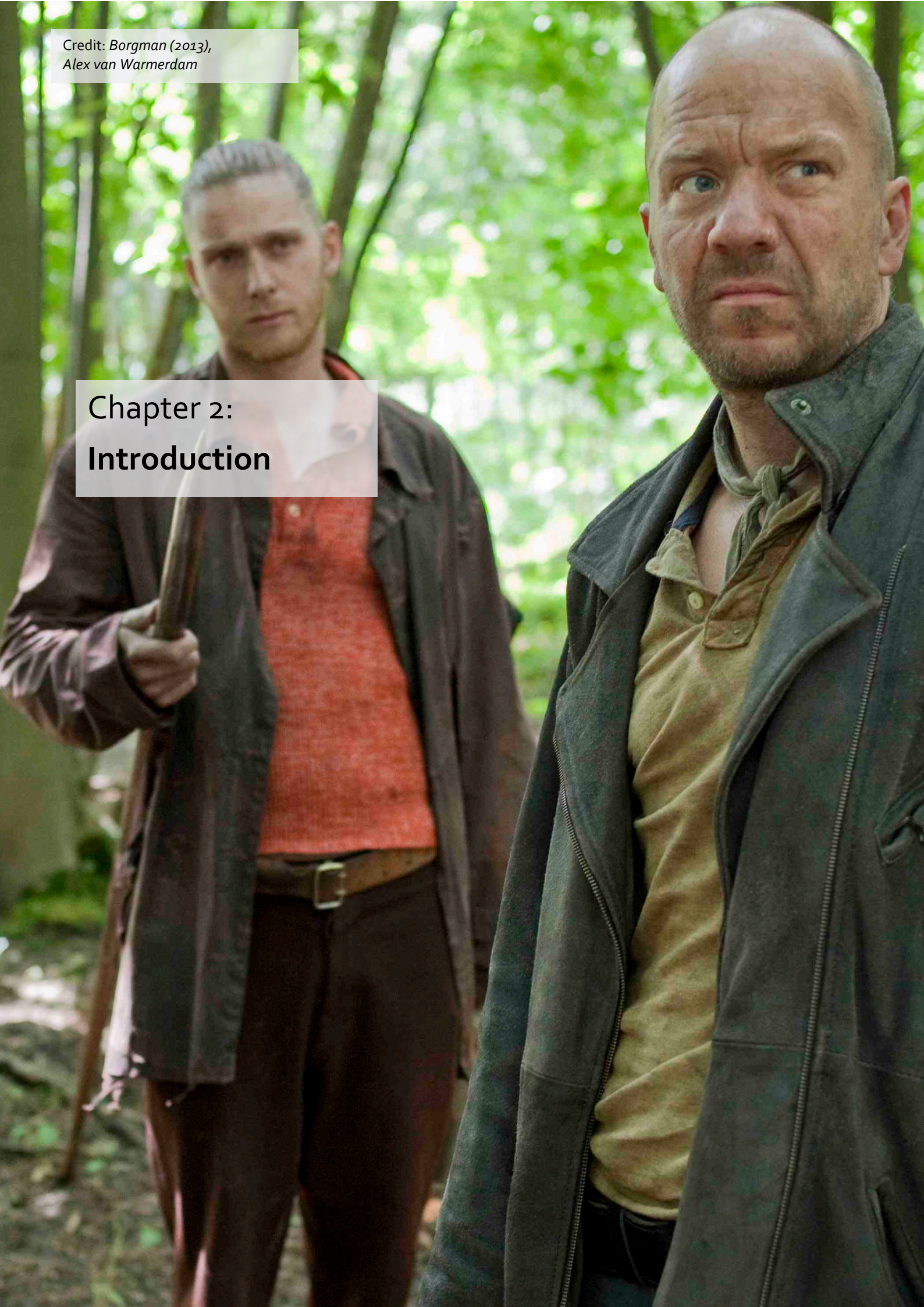
Co-productions have appeared throughout this study when tracking higher performing feature films across all five countries.

Co-production arrangements between European jurisdictions, for example, can and do help provide crucial funding support acting as additional sources of financing; they enable the contribution of distinguished creative talent from other countries; and in many cases, ensure distribution of films to multiple jurisdictions expanding its reach and reception.

The life cycle of a film

The life cycle of a film goes beyond the wrap of production as films need to be packaged and distributed as well as a strategy laid out and support garnered to ensure the appropriate and effective exhibition of that film.

Support for Dutch films across this stage of their life cycle appears to fall short, with films not reaching their full potential or the talent behind high performing films being faced with barriers for continued success.



Credit: *Borgman (2013), Alex van Warmerdam*

Chapter 2:
Introduction

2. INTRODUCTION

This study seeks to unpack the motivations and influences behind the performance of Dutch feature films in comparison to the performance of films from other comparable European jurisdictions. The following is a snapshot of the Netherlands and the Dutch industry, contextualising it within the wider European and global market as well as an introduction to the complexities of measuring the performance of a feature film.

The countries' production output and market overview will be detailed in the following Chapter 3 and the question of performance metrics will be unpacked in Chapter 4 through the consideration of benchmarking the countries specified for this study.

2.1. Contextualising the Production Industry in the Netherlands

The film industry in The Netherlands is a mid-sized market with high domestic and international potential. Being located in the heart of Europe and with an international outlook facilitated by global commerce and a major cultural hub, Dutch film has the potential grow its brand, place itself in the international arena, and position itself among neighbours such as Belgium or Scandinavia.

2.1.1. A Brief Overview of Dutch Feature Filmmaking

Born from a rich tradition in the visual arts, international commerce and exchange, the Dutch film industry in the past ten years grew from the foundations of talents such as Paul Verhoeven (*Soldier of Orange, Spetters, and Blackbook*), and from the history in documentary filmmaking, which included authors linked to various national film movements, curated programmes and the documentary specialisation section within the Netherlands Film Academy, for instance.

In recent years, there have been notable Dutch films that have reached international attention. Among these, for example, is *Dirty God* (Sacha Polak, 2019), *Instinct* (Halina Reijn, 2019) and *My Extraordinary Summer with Tess* (Steven Wouterlood, 2019). Notably the psychological thriller drama *Borgman* (2013) directed by Alex van Warmerdam, which was nominated for the Palme d'Or at the 2013 Cannes Film Festival, as well as the drama *Tonio* (2016) directed by Paula van der Oest.

In the past years, the Netherlands has entered into co-production agreements with a number of countries (Canada, China, France, Germany, Norway, Belgium, and South Africa), which are creating opportunities for co-funding investment, as well as built prospects for local talent to grow international connections and experience.

This attention to international reach is also at the core of the current policy plan of the Film Fund for 2021-2024[4]. Today, in fact, the FF aims to support talent development, innovation, internationalization and professionalisation, by also supporting less established and underrepresented filmmakers and bolstering international coproduction.

Further detail of the Dutch industry in context to other European markets is detailed in *Chapter 3*.

2.2. A Broader Context of Feature Films

Independent feature films are typically financed by a variety of sources, including by way of subsidies and fiscal incentives which are awarded and/or managed by publicly funded agencies. In Europe in particular, there is a well-established infrastructure of national and regional film agencies which provide public money to support the development and production of feature

[4] Beleidsplan Nederlands Filmfonds 2021-2024. Netherlands Film Fund, 2020. Accessible at: https://assets.filmfonds.nl/beleidsplan_2021_2024_issuu_def.pdf

films (and increasingly television drama).[5] Funding to individual projects is mostly awarded on a selective basis, with decisions resting with a fund head or a committee. This is in contrast with fiscal incentives, which are invariably awarded on an automatic basis if the criteria for obtaining such incentives are met.

Public funding support is often considered crucial to ensure that independent films get made – if left to the market alone, such films may not secure financing, since risks are often high relative to the rewards. Investment in film is also seen as being culturally important – by enabling national audiences to see their own lives and identities reflected on screen, enabling cultural expression in native languages, and promoting the images and values of a country to international audiences.

Recent years have seen audiences migrate away from watching filmed entertainment at the cinema and on DVD, in favour of watching films on streaming services. Simultaneously, streaming platforms have significantly increased their investment in high-end TV and films, thereby increasing competition for consumer spending. These trends have meant that independent film production has come under increasing pressure, making it harder for independently financed films to secure visibility in what has become an increasingly crowded marketplace.

In many territories, this has resulted in a reduction of revenues generated by independent film, thereby making it much more challenging to finance such productions, increasing the reliance of many producers on public money. At the same time, as public finances have come under pressure due to the impact of inflation, resources available to these public agencies have also come under pressure[6] – contributing to a cyclical problem.

As a result, the need for independent films to connect with audiences, both in the country in which they are made and abroad, has become even more important to the sustainability of the sector, and to public agencies which need to demonstrate the economic value, as well as the cultural benefits, which they deliver to the wider audience. It is within this broader context, in which the economic and cultural outcomes of supporting film are under more scrutiny than ever before, that SPI has undertaken the current study for the Netherlands Film Fund, analysing the performance of Dutch films internationally.

2.2.1. Defining a Successful Feature Film

A successful production is defined by a film's commercial success and/or artistic and critical success. While some films will be successful both commercially and artistically, others will be successful only in one of these ways, while many films will fail on both counts.

A feature film's commercial success is measured by box office returns and revenues from its subsequent release, for example, on streaming services[7], on pay television and free-to-air television. The commercial success of an individual feature film will be influenced by many variables. Some of these variables relate to the project before it is completed and others are relevant after completion, during the distribution cycle. Elements determining commercial success include the strength of the script, the size of the production budget, the creative talent involved, the creative execution of the film, production values, the marketing and distribution budget, and the skill and expertise of the distributor that acquires the film for distribution in

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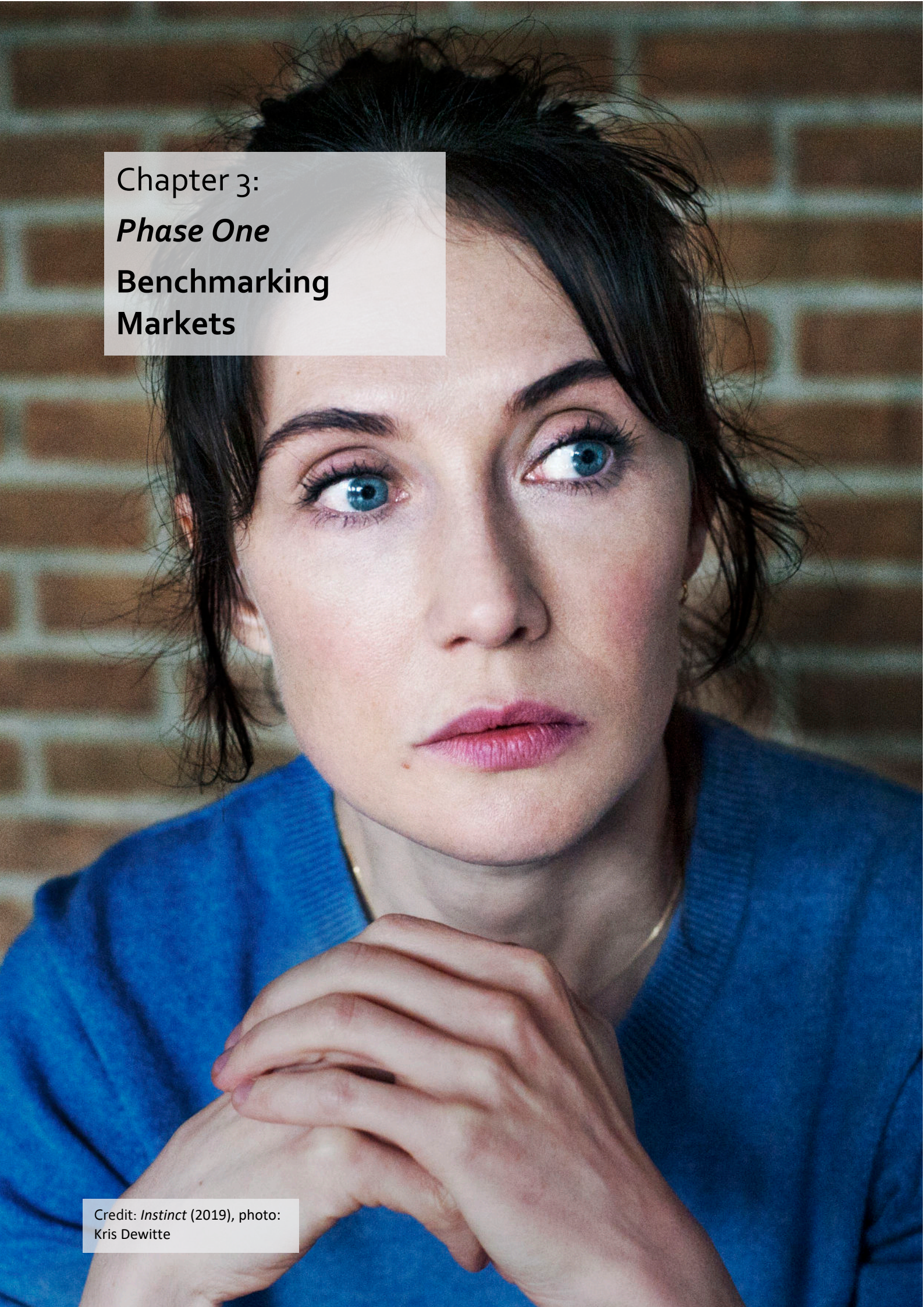
[5] *Funding Body Database*. Cineuropa, 2023. Accessible at: https://cineuropa.org/en/backings/

[6] *Public Film and TV Funds in Europe Face Crisis as Streamers, Other Forces Upend Traditional Business Models*. Variety, 17th May 2023. Accessible at: https://variety.com/2023/film/focus/european-public-funds-1235616333/

[7] Although viewership numbers on streaming services are not public.

their territory. The ability of the distributors across the world to maximise revenues post-release (with the theatrical release acting as a showcase) through the various distribution 'windows' (including pay-TV, home video, free television and digital distribution), will contribute to the degree of commercial success achieved by a film.

In addition to commercial success, or alternative to it, a film may achieve critical and artistic success. Such success is often dependant on factors such as strongly favourable reviews, entry to major international film festivals, and/or nominations or awards at distinguished film awards. The artistic success of a production is likely to be determined by some of the same factors as commercial success but with other elements of consideration such as festival programming preferences as well as creative elements (i.e., the strength of the script, the talent involved, and the execution of the film) being especially important.



Chapter 3:
Phase One
Benchmarking Markets

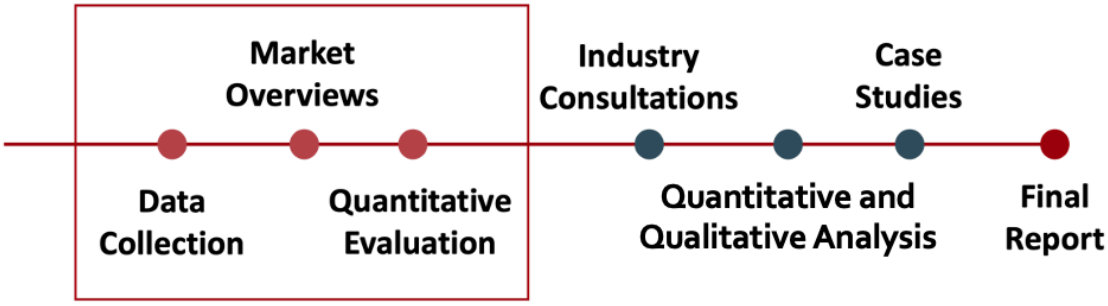
Credit: *Instinct* (2019), photo: Kris Dewitte

3. PHASE ONE: INTERNATIONAL BENCHMARKING

3.1. Phase One Overview

The first phase of the study had a quantitative focus with the main objective being to establish a benchmark through which the Dutch **feature film output**[8] can be compared, using four European countries: **Austria, Belgium, Denmark** and **Sweden**.

Figure 2 – International Benchmark Study Process Phase One



These countries were selected because they all have similar market sizes, and they all are subject to similar market dynamics. The key objective of this phase was to gather and sort the primary base of data that would filter through the rest of the study, quantitively benchmarking the output of feature films across all five countries.

The other aspect of this first phase was to research and review each country's market, outlining industry stakeholders, support systems and key creative outputs.

3.2. Context of the Comparable Markets

SPI sought to outline and briefly contextualise some aspects of the film and television production markets for all five of the benchmark countries.

For each region, SPI highlighted key considerations, including:

- Recurring talent,
- Roles of the main film funding bodies, and
- Key legislative frameworks supporting the sector, including any film production incentive active in the nation.

The exercise demonstrated that indeed, the analysed countries have similar market conditions. Across all similar public policies are in place to support the sector, with film funding bodies acting broadly similarly – i.e., supporting filmmakers from creation, to production, to distribution.

The countries also have additional film funding opportunities, and all have festivals and film schools that support the film sector. International recognition and markers of quality – such as participation and awards at major international events, seem to be driven by key recurring artistic talent (e.g., film directors) who are able to represent their country with high-quality productions.

[8] As this study focuses on feature films with a theatrical release for the period of 2010-2022, the introduction of streaming services as well as the impact of the COVID-19 pandemic have been considered but not directly noted in the findings unless directly relevant.

These market overviews are detailed in *Appendix 1, in Chapter 7*, and were used as supplementary resources to contextualise the trends and initial findings identified during the primary operation of Phase One, being the High Excellence Benchmarking.

Chapter 4:

Phase One

Benchmarking High Excellence

Credit: Unsplash, Stock Photo

4. PHASE ONE: BENCHMARKING HIGH EXCELLENCE

4.1. Phase One Data Analysis

The key element of this first phase of the study was to develop a benchmark that could be used to evaluate the performance of feature films across the five comparative countries - being **Denmark, Sweden, Belgium, Austria** and **the Netherlands**.

Box office admissions were initially identified as a lens for analysis of performance as they are often used in the reporting of a film's success. As global box office admissions are challenging to gather for a wide set of productions due to various distribution streams and a lack of standardised reporting across territories, the first analysis looked at feature films from each region with a minimum European admissions total of 250,000 for the period of the study (2010-2022).

The top twenty films that met that criteria were then further analysed to identify those that received key festival and/or industry award recognition. As the majority of the films filtered into the Top 20 were highly commercial films this did not provide a full picture of overall performance of the film output from the countries, so a secondary lens was developed – termed ***High Excellence***.

4.2. High Excellence Parameters

The High Excellence lens was developed to establish a quantitative baseline of both artistic and commercial success. The parameters for a film to be considered were as follows:

Table 2 - High Excellence Parameters

High Excellence Data Parameters	
Production Format	Films (scripted feature films only)
Production Origin	100% production or Majority co-productions
Artistic Recognition	Films selected for or awarded in the main competition categories for one of the four noted festivals (including Cannes, Berlinale, Venice and Sundance) And/or Films that were nominated for or awarded a major award category (including European Film Award and Academy Award)
Market Recognition	Films that have reached or exceeded European admissions of 250,000

The second analysis involved assembling all applicable feature films **from the five countries** that met both the artistic recognition and the market recognition parameters. Applying both these lenses required a range of considerations as well as exclusions to ensure there was a comparable set of data. The relevant inclusions and process of applying each lens is detailed in the following summaries:

4.2.1. Application of Artistic Recognition

Defining artistic success can be significantly more challenging as it requires the consideration of less objective and more qualitative measurements. With this being said, one way the wider international industry recognises, and rewards high levels of creative talent is through film festivals and awards.

The Festival de Cannes (Cannes Film Festival), Berlinale (Berlin International Film Festival) and La Biennale di Venezia (Venice International Film Festival) are considered three of the top film festivals globally but, as a result of their locations, often are the primary platforms for showcasing notable European content. As the key objective of Phase One of this study was to benchmark five European countries, these three European festivals were chosen. To capture the recognition of more commercially successful artistic work, the European Film Awards were included. In additional to that, the Sundance International Film Festival and Academy Awards were added to account for the international recognition of those countries' films.

This recognition lens through festivals and awards was developed as it attempts to standardise the measurement of artistic success through the widely accepted and practised reviewing and grading of films. However, this metric only considered films that were selected and/or won for the main competition or equivalent, with some inclusions for significant wins in major festival categories (such as Directors' Fortnight). With both the awards, only films that were officially selected and nominated and/or won for the main best feature or best international feature were considered.

Both the festival and award data presented various challenges in terms of collecting and sorting through the selections, nominations, and wins. This is largely due to the time period of the study falling over multiple years in which storing and reporting this information has changed.

4.2.2. Application of Market Recognition

When initially approaching this study, there was an attempt to use global admissions data for the market-based lens of the Top 20 and then High Excellence matrix. However, there is no robust, standardized record of global admissions data that could be used across all five countries for the time period of the study.

The lack of standardised data such as this is a challenge faced across the industry internationally, however it is particularly difficult to source comparable global admissions numbers for films due to varying distributors and reporting of cinema attendance across territories. Thus, European admission numbers were applied as well as National admissions for each relevant jurisdiction.[9]

4.3. High Excellence Matrix

Both the first and second analysis resulted in a robust data matrix. This included the High Excellence list of films as well as the films that were considered for the Top 20 analysis but did not meet necessarily meet the Artistic Recognition lens. Below in Table 3 is the summary of total films listed that met the High Excellence parameters for each of the five countries. ***The full High Excellence matrix for each region is detailed in Appendix 1***.

Table 3 - Summary of Findings from High Excellence Matrix

Summary of High Excellence Matrix Listing					
	Denmark	**Sweden**	**Belgium**	**Austria**	**Netherlands**

[9] Lumiere database used for admissions (2010-2022). Lumiere categorises European Admissions as EU27+GB, which includes the listed National EU countries plus the United Kingdom, which was used as the primary source, as well as EU OBS (European Observatory Data), which was used in the case that EU27+GB was not available.

Films that **met High Excellence Parameters**	14	10	11	5	0

Source: Olsberg SPI

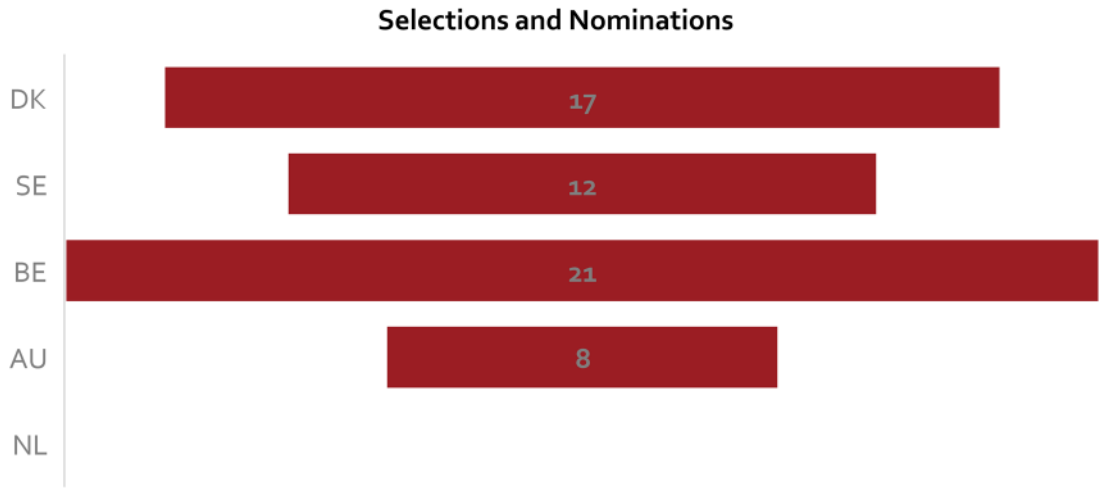
The Netherlands has no feature films from the time period that meet the High Excellence parameters for festival and/or award recognition – Artistic recognition, and with European admissions of 250,000 or more – Market recognition. The closest film to meeting the parameters is *Brimstone* (a feature film directed by Martin Koolhoven, produced in 2016), with 238,488 European Admissions.

Denmark has the most feature films that meet the High Excellence parameters with 14 feature films in total. The findings from both lenses considered in the matrix have been unpacked in the following sections:

4.3.1. Artistic Recognition Findings

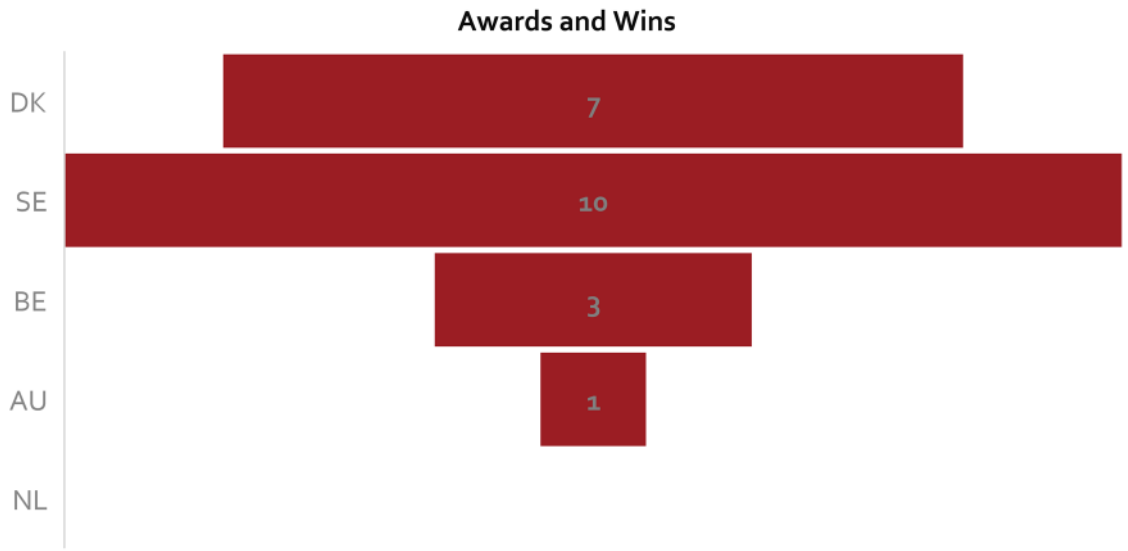
Figure 3 summarise the total selections and nominations for the key festivals (being Cannes, Berlin, Venice and Sundance) and the key awards (being the European Film Awards and Academy Awards). Figure 4 summarises the total selections and nominations that were then converted to wins for the key festivals and key awards. Collectively, these two aspects were used identify the films that received artistic recognition.

Figure 3 - Total Selections for Key Festival Categories and Key Award Nominations in the High Excellence Matrix for 2010 to 2022



Source: Olsberg SPI

Figure 4 - Total Wins at Key Festivals and at Key Awards in the High Excellence Matrix for 2010 to 2022



Source: Olsberg SPI

Belgium had the most selections (with a total of 21) for the key festivals and/or selections or nominations for the two key awards, in addition to that there were 3 selections/nominations that resulted in wins (these being *Deux Jours, Une Nuit, The Broken Circle Breakdown* and *Girl*).

Across the 11 films that met the High Excellence parameters for Belgium, there are notably reoccurring creative talent, with 4 listed films from Jean-Pierre and Luc Dardenne and 2 films from Lukas Dhont. Both the Dardennes, who are considered established industry talents, and Dhont, who is considered a newer directorial voice, have had a continued presence at the key festivals across the past decade. Sweden's High Excellence listing produced the most wins at the key festivals and/or key awards. Out of the 10 films on the matrix, 3 films garnered the most wins, being *Triangle of Sadness, The Square* and *Turist* – all directed by Ruben Östlund.

This framing of Belgium and Sweden's film outputs through High Excellence matrix highlights a relationship between the pipeline of creative talent and potentially higher levels of artistic recognition.

Although the Netherlands had no listings that met the High Excellence parameters, the data could be further analysed to gauge the gap between their film output and the other countries.

4.3.2. Where the Netherlands Artistic Recognition Lies

In order to analyse the Artistic recognition of Dutch films, the European admissions requirement was dropped to 150,000 to capture a larger set of films. With those adjusted parameters, the Netherlands had 4 listings – those being *Brimstone, Tirza, Kauwboy* and *Borgman,* as detailed in the following Table 4:

Table 4 - Dutch Feature Films with Artistic Recognition and European Admissions Equal to or Above 150,000, for 2010 to 2022

Original title	Producing country(s)	Production year	Director(s)	European Admissions (2010 – 2022)	National Admissions (2010 – 2022)	Artistic Recognition
Brimstone	NL, FR, DE, BE, SE, GB, US	2016	Martin Koolhoven	238 488	192 694	Selected for Venice Main Competition, and European Film Award Nomination
Tirza	NL	2010	Rudolf van den Berg	185 106	184 460	European Film Award Nomination
Kauwboy	NL	2012	Boudewijn Koole	171 975	31 131	European Film Award Nomination
Borgman	NL, BE	2013	Alex van Warmerdam	161 842	117 154	Selected for Cannes Main Competition

Source: Olsberg SPI

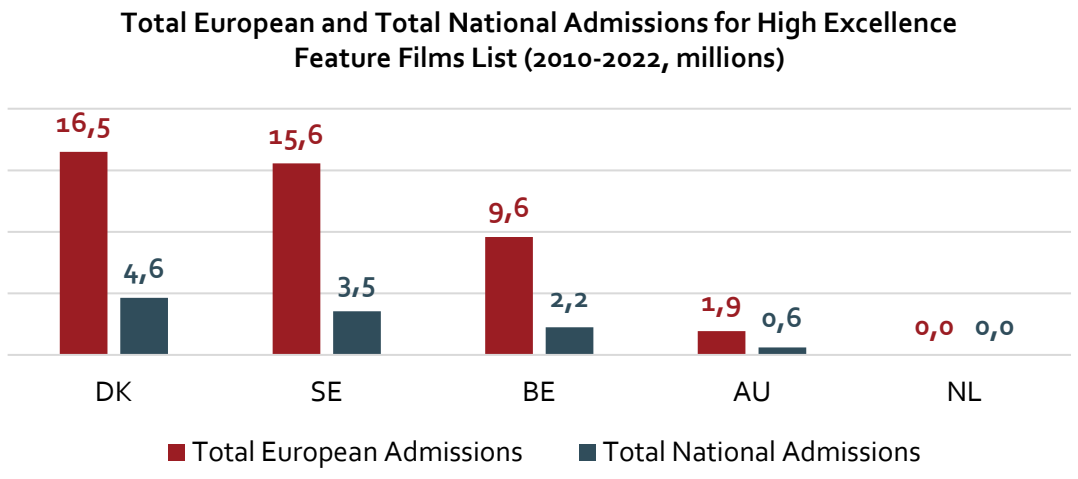
All films listed above had only selections and nominations. Notably, no Dutch film has been awarded a top prize at one of the four key festivals for the study's time period (2010 to 2022). However, beyond the main categories considered, Dutch films are receiving acknowledgment, in the form of selections, nominations and wins, across various other categories – such as those for screenplay, acting, editing, and cinematography, for example.

With both the original High Excellence matrix parameters and the additional adjusted matrix with the lowered admissions, the Netherlands listings reflect the significantly lower admissions and thus market appeal experienced with the Dutch films receiving Artistic recognition.

4.3.3. Market Recognition Findings

Figure 5 showcases the total European admissions across each country's listing of feature films that meet the High Excellence parameters. It also shows the proportion of National admissions for those countries that are included in the total European admissions.

Figure 5 - Total European Admissions and Total National Admissions (per respective region) for the Feature Films listed in the High Excellence Matrix for 2010 to 2022

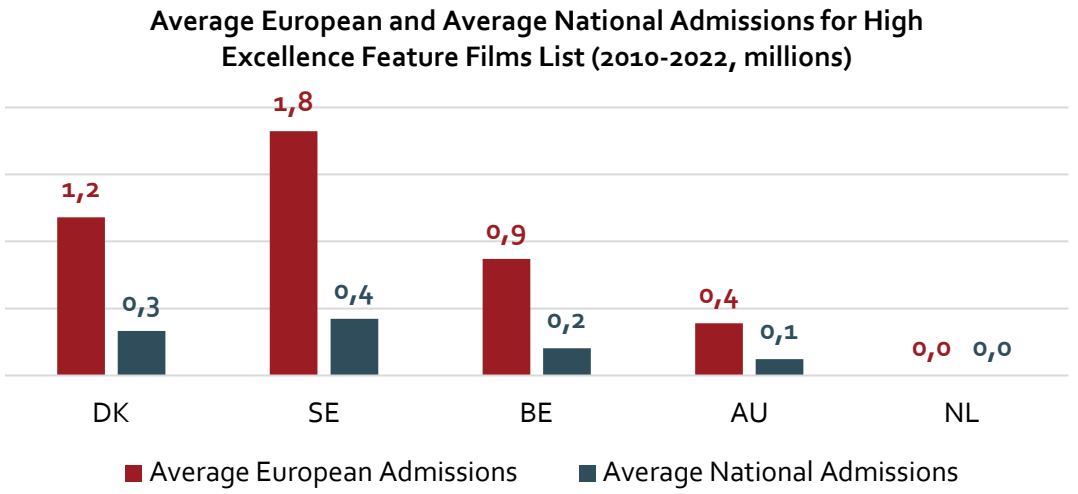


Source: Prepared by Olsberg SPI[10]

With Denmark having the most films meeting High Excellence parameters, it is unsurprisingly the region with the highest total European admissions (16,508,664).

Following that, Figure 6 showcases the average European admissions across each country's listing of feature films. Again, it shows the average National admissions for that specific region.

Figure 6 - Average European Admissions and Average National Admissions (per respective region) for the Feature Films listed in the High Excellence Matrix for 2010 to 2022



[10] Data used in High Excellence Matrix collected from Lumiere EU27+1 OBS admissions numbers*
*2022 SE national admissions data was not available for 'Walad Min Al Janna'. 2022 SE national admissions data for 'Triangle of Sadness' was sourced from Nordisk Film and TV Fund Annual Admissions for Sweden 2022 (*Annual Admissions Chart.* 2023. Accessible at: https://nordiskfilmogtvfond.com/assets/news/Sweden-2022-Annual-Admissions-Charts.pdf)

Source: Prepared by Olsberg SPI[11]

Sweden has the third most feature films across all five countries, with 10 feature films that meet the High Excellence parameters. Also, it has the highest European Admissions Average (1,823,906). As per their High Excellence matrix, Sweden has notably high market success for their films that have also garnered artistic recognition. Four of the ten feature films listed have a total European admission over 1,000,000 with the film with the highest European Admissions being *Hundraåringen som klev ut genom fönstret och försvann* (directed by Felix Herngren and produced in 2013) with total European admissions of 4,512,360.

For Belgium, the portion of National Admissions is the lowest percentage, being around 22% of the Total European admissions. With the most Artistic recognition garnered for films listed in comparison to their lower average National admission levels reflects a trend of Belgium films performing much better outside of National audience.

[11] Data used in High Excellence Matrix collected from Lumiere EU27+1 OBS admissions numbers*
*2022 SE national admissions data was not available for 'Walad Min Al Janna'. 2022 SE national admissions data for 'Triangle of Sadness' was sourced from Nordisk Film and TV Fund Annual Admissions for Sweden 2022 (*Annual Admissions Chart.* 2023. Accessible at: https://nordiskfilmogtvfond.com/assets/news/Sweden-2022-Annual-Admissions-Charts.pdf)

4.3.1. Where the Netherlands Market Performance Lies

With the Top 20 analysis first conducted, the Netherlands list reflected high European admission numbers. However, as noted, none of the films in the Top 20 list met any of the Artistic recognition requirements included in the analysis for the primary data set, being the High Excellence matrix. The following Table 5 is a summary on the Top 20 matrix listing:

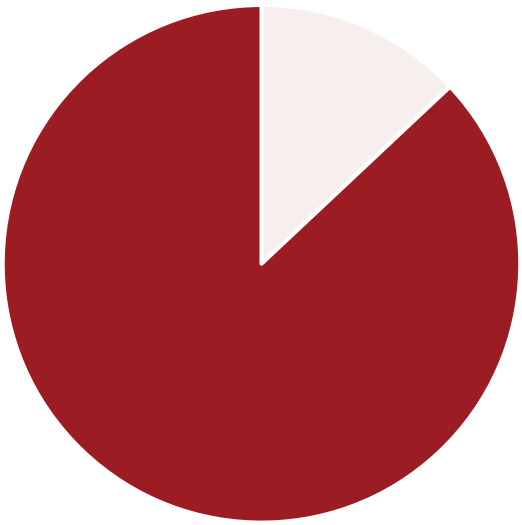
Table 5 - Top 20 Feature Films Ranked by European Admission Numbers for the Netherlands

	Original title	Producing country(s)	Production year	Director(s)	European Admissions (2010 – 2022)	National Admissions (2010 – 2022)
1	*Gooische vrouwen*	NL	2011	Will Koopman	1 986 460	1 915 116
2	*New Kids Turbo*	NL	2010	Steffen Haars, Flip Van der Kuil	1 579 604	1 096 015
3	*The Little Vampire 3D*	NL, DE, DK, GB	2017	Richard Claus, Karsten Kiilerich	1 218 003	85 409
4	*Gooische Vrouwen II*	NL	2014	Will Koopman	1 201 826	1 183 662
5	*New Kids Nitro*	NL	2011	Steffen Haars, Flip Van der Kuil	903 145	490 468
6	*Soof 2*	NL	2016	Esmé Lammers	898 140	898 140
7	*Bon Bini Holland 2*	NL	2018	Jon Karthaus	896 452	880 775
8	*Nova zembla*	NL	2011	Reinout Oerlemans	891 818	891 818
9	*Alles is familie*	NL	2012	Joram Lürsen	878 717	872 914
10	*Soof*	NL	2013	Antoinette Beumer	789 578	786 540
11	*Verliefd op Ibiza*	NL	2013	Johan Nijenhuis	723 124	714 935
12	*De beentjes van Sint-Hildegard*	NL	2020	Johan Nijenhuis	711 417	711 328
13	*De nieuwe wildernis*	NL	2013	Ruben Smit, Mark Verkerk	708 870	700 344
14	*Michiel de Ruyter*	NL, BE	2015	Roel Reiné	697 820	695 283
15	*April, May en June*	NL	2019	Will Koopman	626 623	626 292
16	*Mees Kees*	NL	2012	Barbara Bredero	603 173	603 173
17	*Mees Kees op kamp*	NL	2013	Barbara Bredero	593 699	593 699
18	*Penoza: The Final Chapter*	NL	2019	Diederik Van Rooijen	581 283	581 092
19	*Toscaanse bruiloft*	NL	2014	Johan Nijenhuis	573 685	557 200
20	*Bon Bini Holland*	NL	2015	Jelle de Jonge	556 977	556 977

Source: Prepared by Olsberg SPI

Figure 7 highlights the percentage of total European admissions made up with National admissions for the Netherlands:

Figure 7 - Percentage of Total National Admissions out of Total European Admissions for the Netherlands Top 20 Films Matrix

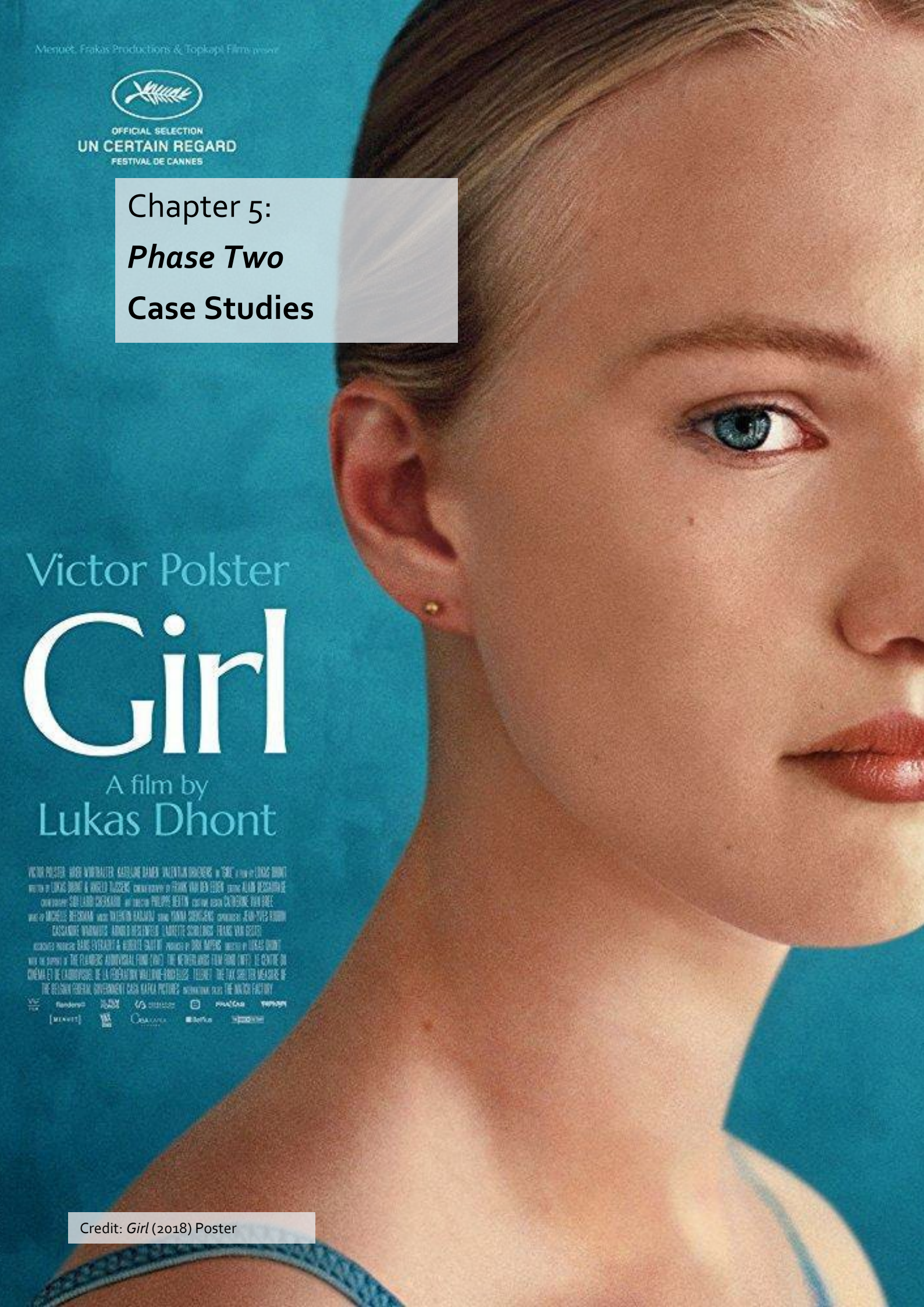


87.63% of the Total European admissions (17,620,414) for the Netherlands Top 20 Feature Film list is made up of **National admissions** (15,441,180).

Source: Olsberg SPI

The Top 20 Dutch films listed are all market-driven feature films – with the majority being family and/or children's films. This genre is one of the most successful across Dutch audiences, which, unlike the other four countries, the national admissions for the majority of the films listed make up a majority of those films' European admissions.

Chapter 5:
Phase Two
Case Studies



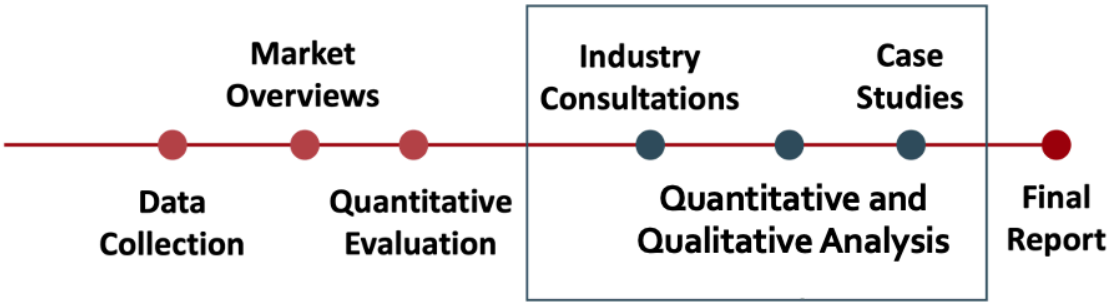
Credit: *Girl* (2018) Poster

5. PHASE TWO: CASE STUDIES

5.1. Phase Two Overview

The quantitative results from Phase One showcased key trends and insights to take forward to the next stage of the study, Phase Two, which looked to more qualitative-driven analysis.

Figure 8 – International Benchmark Study Process Phase One



This second phase involved conducting consultations and engaging with key industry stakeholders. SPI conducted 25 confidential consultations with producers, directors, sales and distribution agents, the regional funds and festival representatives. These conversations were used to unpack the challenges facing the Dutch industry and the potential opportunities to be leveraged, as well as wider considerations of benchmarking film performance.

This phase also involved building out three case studies based on three high performing feature films identified through the first phase's benchmark process. *Brimstone, Girl* and *Druk* were pulled from across the High Excellence matrix as each demonstrates factors that were identified as contributors to and trending across high performing films.

The key elements identified included:

- Creative talent
- Visibility of the film
- Domestic and international recognition, and
- Support received (ranging from funding configuration through to key stakeholder support).

These evaluations were used to demonstrate cases of these influencing factors in the independent context of each real-world example, i.e., as each feature film is subject to a unique set of circumstances and range of influencing elements, each film was analysed independently while using the lens of these key factors to establish which were at play in each case.

These insights collectively came together to then build out the key findings of the study.

5.2. Case Studies

5.2.1 Brimstone

Brimstone is the only Dutch film that almost meets the High Excellence metrics of artistic recognition and admissions. With 238,488 EU admissions, it is just short of the 250,000 High Excellence benchmark for admissions. Further, *Brimstone* stands out as one of the few majority-Dutch productions that has been able to garner domestic and international artistic and audience-based recognition. The film is an example of a Dutch film that reached high levels of artistic recognition and reception owing to factors like creative ambition, vision, targeted development support, and an internationally renowned creative talent backing the film.

Introduction

Brimstone is a psychological thriller written and directed by Martin Koolhoven. It officially released in March of 2017, but the film first premiered at the Venice Film Festival in 2016. The film had an internationally renowned cast, including Dakota Fanning, Guy Pearce, Emilia Jones, Kit Harington, and Carice van Houten.

The story follows Liz (Dakota Fanning), a mute midwife living in a frontier town with her husband (Kit Harrington), stepson and daughter, who is inexplicably hunted by a preacher (Guy Pearce) who comes to their town for a crime she did not commit.

Brimstone had a Hollywood comparable budget of €12,000,000 (US$13,000,000). It received the Netherlands Film Production Incentive,[12] making the film one of the largest majority Dutch productions to be financially backed by the Netherlands Film Fund. Furthermore, 12.5% of the overall budget, i.e., € 1,500,000, came from the Netherlands Film Fund's Crossover scheme.[13]

Success of the Film

Brimstone had 238,488 EU admissions, contributing to high numbers of audience reception. It also garnered a worldwide box office of €1.9 million (US$2,140,941) and, in terms of VoD, it is currently available in 16 European territories.

The film had a significant festival presence and gathered several awards, contributing to a high metric of artistic recognition. Its festival presence was notable: In 2016, the film was selected to compete for the Golden Lion at the 73rd Venice International Film Festival. After Venice, it premiered in North America as a Special Presentation at the Toronto International Film Festival, then moving onto other festivals such as the Sitges Film Festival. The film also won several awards: In September 2017, breaking the festival's previous record of four awards, the film won six Golden Calves at the Netherlands Film Festival. [14] Additionally, Koolhoven won the Gouden Pen (Golden Pen) for the screenplay and the Gouden Film (Golden Film) for the film, having exceeded 100,000 admissions as awarded by the Netherlands Film Festival and Film Fund.

What worked for *Brimstone*

Brimstone's high performance can be attributed to the following key factors:

- **Significant support for the development stage of the film.** The film received funding support through the Netherlands Production Incentive and the Netherlands Crossover Scheme. A selection of support mechanisms were allocated to development over a significant period of time, from initial treatment development to script development and finally production development, which took place from 2011 through to 2013. This is a notable investment of time and financial resources and shows its value in building a foundation from which to effectively build out a successful film. Additionally, *Brimstone*'s success and international reach shows the importance of financial investment in Dutch films that bend standard genres and demonstrate creative ambition (demonstrated below).

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[12] *Investment Up in Dutch Film Industry*. Netherlands Film Fund, 8th May 2020. Accessible at: https://www.filmfonds.nl/actueel/film-production-incentive-blijft-vruchten-afwerpen-high-end-series-in-de-lift

[13] Davide Abbatescianni. 2020. The Netherlands Film Fund's Dutch Crossover scheme backs two new projects. Accessed at: https://cineuropa.org/en/newsdetail/388942/ ; Funding from the Netherlands Film Fund's Dutch Crossover scheme is aimed at aiding films that have the potential to reach wider audiences, both domestically and internationally, and is focused on supporting filmmakers who intend to broaden their audience base.

[14] Film Festival NL. (Website). Accessed at: https://www.filmfestival.nl/en/person/martin-koolhoven

- **The creative ambition backing the film**. Koolhoven has been noted to have attributed the success of the film to creative ambition, of both him and his long-running producing partner Els Vandevorst. The significance of this partnership between producer and director has been detailed in the *Key Findings in Chapter 6*. The initial scope of the film was significant, being high-end of the budget spectrum. It is this joint ambition to push beyond the boundaries of local market trends or the limitations of what is often deemed arthouse tradition that makes this creative partnership unique in the Dutch industry.
- **The 'cross-over' vision for the film.** *Brimstone* was the trialling of Koolhoven's intention to create a film that was a 'crossover' between artistic and accessible, i.e. a film that has commercial potential, appealing to both an international and local audience, while also being a genre-bending film that is an "emotional experience first".[15] True to this, the film drew attention and praise[16] for its updated Western aesthetic as well as its dark and emotive storyline, being showcased at a number of film festivals; while also appealing to audiences, having garnered a significant box office, especially for a Dutch film.
- **Internationally renowned creative talent in the film.** Aside from being written and directed by Martin Koolhoven, who has become known has one of Dutch cinema's most successful creative talents,[17] the film's internationally renowned cast played a big role in enhancing its reception among international audiences. As demonstrable from reviews[18] of the film hailing the cast for their performances in bringing the characters to life, and successfully delivering Koolhoven's creative vision.
- **The visibility of the film.** As a Dutch film, *Brimstone* was able to travel across to international audiences due to its high cinematic quality, contemporary take on a standard genre and its internationally renowned cast. Key to its visibility was *Brimstone's* significant festival presence, which can be cited as a result of Koolhoven's previous success with *Oorlogswinter* – further highlighting the advantage of continued creative talent support.

Brimstone is an example of a Dutch film that almost met the High Excellence benchmark, due to creative ambition, the vision, targeted development support, an internationally renowned creative talent all contributing to the visibility of the film. This demonstrates the importance of such factors in enabling the commercial and artistic success of Dutch films.

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[15] European Film Awards. (Website). Accessed at: https://europeanfilmawards.eu/en_EN/film/brimstone.9306
[16] Brimstone Review. Empire, 25th September 2016. Accessible at: https://www.empireonline.com/movies/reviews/brimstone-review/; *Brimstone Review*. The Guardian, 3rd September 2016. Accessible at: https://www.theguardian.com/film/2016/sep/03/brimstone-review-dakota-fanning-guy-pearce-venice-film-festival.
[17] Martin Koolhoven (Website). Accessed at: https://www.martinkoolhoven.nl/
[18] *Film Review: Brimstone*. Variety, 3rd September 2016. Accessible at: https://variety.com/2016/film/reviews/brimstone-review-venice-film-festival-dakota-fanning-guy-pearce-1201851701/ ; *Brimstone Review*. The Guardian, 3rd September 2016. Accessible at: https://www.theguardian.com/film/2016/sep/03/brimstone-review-dakota-fanning-guy-pearce-venice-film-festival.

5.2.2 Girl

Girl achieved well over the High Excellence metric of European admissions with 952,944 admissions, a high metric in the context of both Belgium and Dutch films. The success of the film is attributable to continued public funding support through the lifecycle of the film, further highlighting the importance of fostering and supporting creative talent.

Introduction

Girl is the first feature film of the Belgian director Lukas Dhont. It was released in 2018 as a co-production between Belgium and Netherlands, co-produced between Topkapi Films (NL) and Frakas Productions (BE). Dhont also collaborated with the Flemish producer Dirk Impens, from the independent production company Menuet – known for having produced some of Felix Van Groeningen's films.

The film is the story of a teenager who attends a prestigious ballet school in a new city while grappling with her gender dysphoria. The film was inspired by a meeting between the director and Nora Monsecour, a professional dancer and trans woman from Belgium by whom the storyline is loosely inspired. The lead talent for the film is Victor Polster, a Belgian actor and dancer who had his acting debut in *Girl*.

The film budget for the film was approximated at €1,500,000[19],[20] and received support from the Flanders Audiovisual Fund (VAF), the Wallonia-Brussels Federation's Film Centre and the Netherlands Film Fund. The film also received funding from Telenet . Looking at public support in particular, the film received support across its lifecycle, from a grant for scriptwriting support by the VAF in 2014 (€12,500), to development support in 2015 (€12,500), 2016 (€30,000) and 2017 (€500,000). In 2017, the film also received minority co-production support from the FF and VAF, for a value of €200,000, with the Dutch share of this support being 13%.[21] FF also helped in the final phases of the film's lifecycle, with distribution (€10,000) and international festival support (€ 500) .

The film was distributed by Diaphana Distribution, Teodora Film, Vértigo Films, Lumière, Cinemien, Universum Film GmbH, Seven Films, Curzon Artificial Eye, Filmbazar[22]; and supported by MEDIA with €692,866 for its distribution in more than 25 countries.[23]

Success of the Film

Girl totalled 952,944 European admissions,[24] and a worldwide box office of €8.94million (US$8,719,182) as of October 2022.[25]

The film was generally positively received by critics, screened at festivals, and won numerous awards. It screened in the Un Certain Regard section at the 2018 Cannes Film Festival, where it won the Caméra d'Or award, for best first feature film, as well as the Queer Palm, and the

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[19] *Girl*. IMDB, 2018. Accessible at: https://www.imdb.com/title/tt8254556/
[20] *Girl.* The Numbers, 2018. Accessible at: https://www.the-numbers.com/movie/Girl-(Belgium)-(2018)#tab=summary
[21] *Facts and Figures*. Netherlands Film Fund. 2015. Accessible at: https://assets.filmfonds.nl/Film-facts-and-figures-2019_V15_SPREADS.pdf
[22] *Girl*. Cineuropa, 2018. Accessible at: https://cineuropa.org/film/351459/
[23] *11 EU-supported films awarded with 17 prizes at the European Film Awards 2018*. European Commission, 17th December 2018. Accessible at: https://digital-strategy.ec.europa.eu/en/news/11-eu-supported-films-awarded-17-prizes-european-film-awards-2018
[24] *Girl*. Lumiere, 2018. Accessible at: https://lumiere.obs.coe.int/movie/77768#
[25] *Girl.* The Numbers, 2018. Accessible at: https://www.the-numbers.com/movie/Girl-(Belgium)-(2018)#tab=summary

lead actor Victor Polster won the Un Certain Regard Jury Award for Best Performance. *Girl* also won Prix Fipresci for Best European Discovery. It received nine nominations at the Magritte Awards and won four, including Best Screenplay and Best Actor. It was nominated at the European Film Awards for Best Film in 2018, and the lead actor Victor Polster was nominated for Best Actor.

What worked for *Girl*

Girl's high performance can be attributed to the following key factors:

- **The advantages of a co-production.** The co-production of the film with producers in Belgium enabled the film to receive further production support crucial to the film (detailed below). Having this agreement spread the resource demand but increased the potential exposure and visibility of the film.
- **Public funding allocated throughout the film's lifecycle.** Funding support was provided through script writing, to development, through till distribution. This allowed the film to develop quickly, secure impressive results and be distributed across 25 countries. This was particularly helpful considering the limited previous track record of its creative team.
- **Powerful social message of the film.** Although the film sparked discussions around the representation of trans identities in films – with controversies linked to the central casting of a cisgender actor in a trans role,[26] the intimate, yet provocative way the film portrayed issues linked to gender dysphoria, made *Girl* a film discussed by critics and viewed by audiences.

The success of *Girl* shows the value of public funding across all stages of the film's lifecycle, particularly when there is a budding creative talent to be fostered and leveraged, such as Dhont.

[26] *There's No Good Reason to Watch Belgium's Controversial Girl*. Vanity Fair, 15th March 2019. Accessible at: https://www.vanityfair.com/hollywood/2019/03/netflix-girl-review; *Film of the Week: Girl is an Intimate, Imperfect Portrayal of Trans Life*. BFI, 3rd April 2019. Accessible at: https://www2.bfi.org.uk/news-opinion/sight-sound-magazine/reviews-recommendations/girl-victor-polster-lukas-dhont-transgender-ballet-dancer-teenager-intimate-portrayal

5.2.3 Druk

Druk achieved over the High Excellence metric of European admissions with 2,939,686 EU admissions, alongside high box office numbers of €20.3 million. The film's success is attributable to the distinguished creative talent pipeline from Denmark and Netherlands involved in the making of the film – which, in turn, was made possible by the co-production arrangements in place. The easily translatable storyline further benefitted the film, taken to audiences across multiple jurisdictions via the distribution arrangements set up across Scandinavian countries. The success of the film demonstrates the value of co-productions and a healthy creative talent pipeline.

Introduction

Druk is a black comedy-drama, directed by Thomas Vinterberg. It was produced by Zentropa Entertainments3 in co-production with Film i Väst, Zentropa Sweden, Topkapi Films and Zentropa Netherlands. The film's lead was renowned Danish actor, Mads Mikkelsen.[27]

The film's story revolves around four friends who decide to test a Norwegian psychologist's theory, according to which, humans are born with an alcohol deficit in their blood. Through the story, which follows the four friends' "systematic intake of alcohol," the film examines the benefits and shortcomings of alcohol. The film is intended to be "a multi-faceted story that at the same time provokes and entertains, makes us think, cry and laugh."[28]

Druk's budget was DKK33.5million (i.e., US$5.2million / €4.5million). The film was financed by Det Danske Filminstitut, TV 2 DANMARK, Eurimages, Svenska Filminstitutet, the Netherlands Film Fund (Production Incentive) and the Media Programme of the European Union.[29]

The film was distributed in Denmark and Scandinavian countries via Nordisk Film Distribution.[30] International sales were handled by TrustNordisk, who brokered distribution deals with distributors across the world, such as StudioCanal for UK and Ireland, Mongrel Media for Canada, Wltkino for Germany and Austria, and Samuel Goldwyn Films for the US.[31]

Success of the Film

Druk achieved 2,939,686 EU admissions. Further, it achieved a worldwide box office of €20.3 million (US$21,698,8957).

Druk won Best International Feature Film at the 2021 Oscars and Vinterberg was nominated for Best Director. It also won four European Film Awards, including Best Film, and earned four BAFTA Awards. Further, it was showcased at the Cannes film festival.[32] Winning these awards

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[27] *Thomas Vinterberg's Druk and Maria Sødahl's Hope Nominated European Film Awards*. Film I Vast, 3rd December 2020. Accessible at: https://filmivast.com/thomas-vinterbergs-druk-and-maria-sodahls-hope-nominated-european-film-awards/

[28] *Another Round, A Film by Thomas Vinterberg*. Cannes Film Festival Press Kit, 2020. Accessible at: https://cdn-medias.festival-cannes.com/uploads/2023/03/107384.pdf

[29] *Thomas Vinterberg's Druk and Maria Sødahl's Hope Nominated European Film Awards*. Film I Vast, 3rd December 2020. Accessible at: https://filmivast.com/thomas-vinterbergs-druk-and-maria-sodahls-hope-nominated-european-film-awards/

[30] *Another Round*. Cineuropa, 2020. Accessible at: https://cineuropa.org/en/film/387822/

[31] *Samuel Goldwyn Films Takes 'Another Round' for U.S*. The Hollywood Reporter, 9th September 2020. Accessible at: https://www.hollywoodreporter.com/news/general-news/samuel-goldwyn-films-takes-another-round-for-u-s-4057103/#:~:text=Samuel%20Goldwyn%20Films%20has%20acquired,at%20the%20Toronto%20Film%20Festival

[32] *Druk, Thomas Vinterberg*. Cannes Film Festival, 2020. Accessible at: https://www.festival-cannes.com/en/f/druk/.

cemented the success of the film and helped ensure that it would have a significant and valuable lifespan well beyond its theatrical release.

What worked for *Druk*

Druk's high performance can be attributed to the following key factors:

- **The strength of the film's creative talent pipeline.** The film benefitted from the involvement of an array of internationally recognised and highly successful creative talents. The film was directed, and partly written by Thomas Vinterberg, who is one of the best known and most prolific creative talents in the Danish film sector with three films included in the Danish High Excellence metric. Further, the film was produced by renowned producers such as Sisse Graum Jørgensen (Denmark) who is another successful filmmaker with numerous significant box office and Oscar and Golden Globe awards successes to her name and had an established slate of work with Vinterberg.[33] The film's lead was the internationally renowned Danish actor, Mads Mikkelsen, who previously received the European Film Award for his contribution to world cinema, and has featured in numerous award-winning international and Hollywood productions.[34] Vinterberg and writer, Tobias Lindholm's, long-standing partnership through various collaborations also shone through with the dedication to the film's development and delivery. The combination of these creative talents, particularly the impact of those long-standing partnerships between the director and his respective counterparts, ensured that the project would have significant visibility from the outset and stir strong interest among potential distributors, not just in the Nordics and Europe, but also globally.
- **Drawing from multiple sources of experience.** The film was co-produced by well-known and experienced producers across Denmark, Sweden and the Netherlands, and, enabling the creative contribution of renowned talents from these countries, alongside fundamental production support.
- **Robust distribution of an easily translatable storyline.** The film's distribution in multiple jurisdictions across the world through the establishment of robust distribution arrangements, helped enhance the reception of the film internationally. This was further enabled as *Druk* delivered a storyline within a genre that is easily translatable across Danish, European and international audiences and for that, the film garnered notable recognition.

The success of *Druk* demonstrates the value of co-productions that further enable the involvement of distinguished creative filmmaking talent in the production of the film. Robust distribution channels across the Scandinavian countries where the film was co-produced helped take the film – which had an easily translatable storyline to audiences across Europe and the rest of the world.

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[33] *Another Round, A Film by Thomas Vinterberg.* Cannes Film Festival Press Kit, 2020. Accessible at: https://cdn-medias.festival-cannes.com/uploads/2023/03/107384.pdf

[34] *Another Round, A Film by Thomas Vinterberg.* Cannes Film Festival Press Kit, 2020. Accessible at: https://cdn-medias.festival-cannes.com/uploads/2023/03/107384.pdf

Chapter 6:
Phase Two
Key Findings

Credit: Set Still *Sweet Dreams* by Romain Philippon, 2023

6. PHASE TWO: KEY FINDINGS

Following the review and analysis of the High Excellence Matrix, the initial stages of Phase Two – being the three case studies and industry consultations, resulted in subsequent insight and feedback to measure against the Phase One findings.

In compiling the information gathered across both phases, the following five key findings were identified:

- **Genre and Identity**
- **Supporting and Sustaining Creative Talent**
- **Prioritising Quality Over Quantity**
- **The Value of Co-productions, and**
- **The Life cycle of a Film.**

There were many industry levers and external influencing factors to consider, these findings were the stand-out considerations that could be tracked across both the quantitative benchmarking process and the qualitative industry feedback:

Genre and Identity

The popularity of film genres and their influence on the level and the type of success highlights the ongoing friction between arthouse and commercial films. This split between arthouse and commercial is clearly illustrated with the Dutch output of feature films as the Netherlands has many high performing market-centric films and few films that manage to garner similarly high levels of artistic recognition.

As highlighted through the Top 20 listings of high market performing Dutch films, the most popular genres in the Netherlands are Family, Youth and Romantic Comedies. These genres can generally be grouped together as *Commercial genres* as they can be cost efficient, with lower to mid-level budget ranges, and often fall into a formulaic narrative, meaning they are quick and relatively easy to turn out. There are however exceptions, particularly in the case of Arthouse Youth films. Most notably, feature films within this genre grouping have strong commercial value as the narrative itself and the marketing and distribution of these films are 'market' driven and thus made with the audience in mind.

Commercial films are viewed as opposed to films that are grouped in the Arthouse genre. Arthouse films are often categorised as such as they are projects made for the craft of filmmaking, i.e., the primary focus is on the telling of the story as opposed to the marketability of the film. This polarising of film genres is a long-standing issue that is present across the global industry, however, the framing of films' performances through the High Excellence and Top 20 matrices clearly visualises this dichotomy in the Netherlands in particular.

This trend results in a systematic barrier for filmmakers as it perpetuates a choice between making films that result in commercial success, which can be restrictive, or making films for artistic success and often industry acknowledgement, which can often not be commercially sustainable.

There is also a significant cultural element at play that directly relates to where national audiences' interests lie and how those should be influencing filmmakers, if at all. This feeds into the final key finding listed, which links to importance of the consideration of a film's lifecycle when setting it up for success.

This is a challenge for many countries, the comparable countries included. In Belgium, there is movement across the sector to reframe the concept of commercial filmmaking and bring it into

focus at the development stage of all features – strategizing and producing films that are both commercially and craft driven, at times termed *crossover films*, from their inception stage. Achieving a *crossover status* at the inception of a film is itself challenging, as commercial success cannot be measured until the film has been made. However, it does encourage filmmakers to open up to considerations of audience trends and the overall reception of the final project as opposed to solely focusing on the making of the film. As detailed in the case studies, *Druk* is a key example of this, as the film was conceived with international audiences in mind while still functioning as an arthouse film.

Supporting and Sustaining Creative Talent

The talent driving a project is a key influencing factor in the potential success of a film. The Netherlands has produced notable directorial names over the past decade and the pool continues to show promise, however these creatives come up against more challenges than those from the comparable countries stunting the potential for sustained development and limiting the pipeline of talent.

Through consultations, there was over-arching feedback that there is currently limited support, in terms of financial barriers as well as restricted resources that are readily accessible or provided by industry bodies. Often, following their successes, this results in talent leaving the Dutch industry for other European or, in some cases, American markets that offer more structure and support to further their careers and future projects. Creative talent is a key contributing factor to the overall performance of a market as showcased through the High Excellence listings of the countries – positively influencing admissions and contributing to the quality and reputation of films considered for high level festivals and awards.

The creative talent in the Netherlands is significantly siloed. As showcased in the Top 20 matrix, there are notably commercially successful directors who have established a continuous presence in the industry. These include:

- Johan Nijenhuis - with 8 films listed,
- Will Koopman - with 6 films listed, 2 of which have over 1 million European admissions,
- Joram Lürsen - with 3 films, and
- Pim van Hoeve - with 2 films listed.

All the above listed directors mainly produce market-centric films that fall into the popularised genre grouping mentioned, which includes Family, Youth and Romantic Comedy.

Only in lowering the High Excellence Market Recognition lens to 150,000 admissions, were the following directors listed:

- Rudolf van den Berg,
- Boudewijn Koole,
- Alex van Warmerdam, and
- Martin Koolhoven

The above directors had only one film that met both the Market recognition lens (of equal or above 150,000 European admissions) and the Artistic recognition lens (of a selection or win for the key festivals or awards). In comparison to the four comparable countries, the pipeline of Dutch creative talent appears stunted. There are high levels of talent potential but there is limited support to convert that potential into sustained output of high performing films as well as limited motivation for creative talent to continue to pursue avenues of filmmaking in the Netherlands that may not be commercially viable. To note, the significant creative potential

across the Netherlands is further highlighted through the country's ongoing output of well-crafted and high performing documentaries and animations.

Other countries have equally faced this problem but have leveraged the reputation of their existing pipeline of talent and ensured they have a sustained connection to and involvement in their national industry. Belgium is an example of this as evidenced through the on-going output of films from Luc and Jean-Pierre Dardenne. In addition to that support, it is also needed to bring in and foster new talent, again demonstrated through the sustained support and high-performance output from Belgium's, Lukas Dhont. Additionally, the Danish Screen Mentorship and Support Programme for new and emerging talent is an example – reflected through the recurring talent present in the High Excellence matrix list for Denmark, including *Thomas Vinterberg*, with 3 films, *Lars von Trier*, with 4 films and *Susanne Bier*, with 2 films.

All three case studies further highlight the auteur nature of high performing films for these countries. The partnership between Martin Koolhoven and Els Vandevorst for *Brimstone* is an example of how a wider scope and broader ambition for a project can contribute to a project's performance. Vandevorst was both a creative partner and a driving force behind putting together the resources necessary to feed both her and Koolhoven's ambition for the project.

However, through consultation with industry, it was highlighted that this kind of partnership is lacking across Dutch filmmaking, with the dynamics between the two roles often weighted down by opposing intentions – as directors are often driven by the craft and prioritise the story-telling and producers are often driven by the commercial viability of the finished product.

Prioritising Quality Over Quantity

The Netherlands has a significantly high output of feature films, the most in comparison to the other four comparable markets analysed in this study. Regions such as Denmark and Belgium are producing just over half the amount films year-on-year but, considering the High Excellence benchmarking as a metric of high cumulative performance, the Danish and Belgium markets are showcasing a higher quality of film.

From the consultations, industry insight pointed to funding being distributed across a significantly wide spread of projects but should rather be focused on a more concise content pool with clear and standardised intentions and expectations of development, production, and distribution. This is highlighted below in Table 6 in comparing the outcome of the High Excellence Matrix findings with the total feature films produced by each comparable region in the same period:

Table 6 - Summary of High Excellence Matrix Findings and the Total Films Produced Per Region To-Date

High Excellence Matrix Findings and Feature Film Outputs					
	Denmark	**Sweden**	**Belgium**	**Austria**	**Netherlands**
Films that **met High Excellence Parameters**	14	10	11	5	0
Total Feature Films **Produced Between 2010-2022**	272	360	264	204	487

Source: Olsberg SPI[35]

Although there are exceptions, most often larger budget features result in a more significant return. This is not merely due to production value but can be attributed to investment in areas of the filmmaking process that are often neglected in favour of other budget allocations. The development of a film is an example of a process that is lower in the prioritisation of budgets for many filmmakers, in particular producers who are under pressure to secure a film in production as quickly as possible. However, the stage of development can be tracked as one of the key stages contributing to the eventual high performance of a film.

Brimstone is an example of this as development was highlighted as a fundamental part of producing the film, which contributed to the overall high-range budget of the project. Martin Koolhoven's commitment to development has been further noted through is recent work with upcoming directors and writers, which is focused on concept development, treatments and pitching.

On the other side of development is distribution, which will be further unpacked in the final finding listed as a key stage of filmmaking that is often overlooked. With less productions pulling from the pot (which considers not only funding but also supportive resources – such as advisory services, marketing and PR, and training, for example), a higher level of support is focused on the overall performance of those select films. Festival support is key to ensuring exposure of a country's content as well as a fundamental part of creative talent building as well as fostering ambition and building domestic industry morale.

The Value of Co-productions

Co-productions have appeared throughout this study when tracking higher performing feature films across all five countries. Co-production arrangements between European jurisdictions, for example, can help provide crucial funding support acting as additional sources of financing; enable the contribution of distinguished creative talent from other countries; and in many cases, ensure distribution of films to multiple jurisdictions expanding its reach and reception.

Girl and *Druk* are case studies of films whose success and High Excellence parameters were enabled in part, if not in full, by co-production arrangements. *Girl*, being a co-production between Belgium and the Netherlands, is an example of a film that benefited from additional funding brought in by way of the co-production arrangement. This was especially beneficial to the film not only in ensuring crucial funding support throughout the film's life cycle, but also in supporting the film's relatively new and inexperienced filmmakers.

Another example of a successful co-production is *Druk*, which was co-produced with Sweden and Denmark. *Druk* saw the coming together of renowned and award-winning filmmakers from Denmark, the Netherlands, and Sweden, which contributed significantly to the quality and reputation of the film being made.

[35] All markets' figures sourced from The European Observatory's publications of Focus (Editions for 2013, 2016, 2020 and 2023). The Netherlands figures: Netherlands Film Fund

The Life cycle of a Film

The life cycle of a film goes beyond the wrap of production as films need to be packaged and distributed as well as a strategy laid out and support garnered to ensure the appropriate and effective exhibition of that film. Support for Dutch films across this stage of their life cycle appears to fall short, with films not reaching their full potential or the talent behind high performing films being faced with barriers for continued success.

Consultations revealed that there is a systemic challenge across the Dutch industry in the conceptualisation of films, with some viewing a project's lifespan from development through to the final cut without the films trajectory after production being a consideration that can and should feed into the making, financing, and planning of the film.

In the case of *Girl*, public funding was allocated throughout its lifecycle which allowed the film to develop quickly and to secure impressive results, especially when considering the limited previous track record of its creative team.

Promotional support is key to ensuring adequate exposure for a film. In the case of *Brimstone*, there were 5 Netherlands Film Fund sources of promotional and competition funding support as well as varying industry bodies granting resources and platforms for the film.

Industry support also needs to go beyond funding and aiding in the production of films, as tailor-made support is needed to take the film through its lifecycle and aid in carrying it through the phases of international exhibition and distribution to ensure higher admissions as well as artistic recognition. This has become even more relevant with the uptick in streaming services and the increasingly competitive distribution landscape.

This links back to the first finding in that it highlights the limitations Dutch filmmakers experience through not considering audience appeal and commercial value. With creative talent tending to be inward-looking, this perpetuates the gap between what is viewed as making films for the craft – artistic/arthouse films, or films for the audience – commercial/market films. Considering a project's audience, particularly one that falls into the category of arthouse, presents the opportunity to cultivate audiences and work to introduce new genres into the zeitgeist. It is in this that a film can be given direction and, when combined with a system to support that lifecycle, can garner a significantly higher performance level.

Appendices

Credit: *Dirty God* (2019), Vicky Knight

7. APPENDIX 1 - MARKET CONDITIONS OVERVIEW

For each of the five countries, the following overview provides a contextual snapshot[36] of each of the markets. To do this, three key considerations were made:

- Recurring talent,
- Roles of the main film funding bodies, and
- Key legislative frameworks supporting the sector, including any film production incentive active in the nation.

The purpose of these narratives are to outline each European market at a high-level for readers without scope of the countries and are not fully representative of the depth of each industry, particularly in the case of varied creative talent, for example. These were used as a starting point from which further, quantitative analysis was done for the benchmarking process of the study.

7.1. Netherlands

Some of the key and recurring talent that have recently contributed to the Dutch film industry include **Paul Verhoeven (*Blackbook/Zwartboek*, *Benedetta*)**, Alex van Warmerdam (*Borgman*), Fleur van der Meulen (*Pink Moon*), Sacha Polak (*Dirty God*), Halina Reijn (*Instinct, My Extraordinary Summer with Tess*, and others). Although *Brimstone* (Martin Koolhoven, 2017) was noted as one of the only films to almost meet the High Excellence parameters, in terms of both admissions and artistic recognition, the above reoccurring talent have produced films over the past decade that have received notable artistic international acknowledgement outside of the parameters set out for the High Excellence matrix.

The Netherlands is particularly prolific in terms of number of films produced. In fact, SPI analysis shows that the Netherlands produced **487 feature titles** between 2010 and 2022 – making it the country among those analysed with the highest number of films produced. The key film festivals in the country are International Film Festival Rotterdam (IFFR) and the International Documentary Film Festival Amsterdam (IDFA), and the main education provider for the industry is the Netherlands Film Academy.

The main institute working to grow the film industry sector in the country is the **Netherlands Film Fund (FF)**. The FF provides support to filmmakers across their production journey – from development to production to distribution of features, documentaries, animation films, experimental films and shorts. When considering the investment distributed via the Production incentive for film and television series, as well as the Selective funds for features, the amount invested was EUR 46.9m across the various stages of 329 projects, which included short fiction, debuts and international participation. The total amount spent across all films and activities in 2022 was EUR 80.2m. Beyond the Film Fund, there are a number of alternative film funding opportunities – including private investment opportunities, individual broadcasters, the Abram Tuschinski Fund (ATF) and the NPO-Fonds, The Hubert Bals Fond, IDFA Bertha Fund, VSBfonds, Fonds 21, as well as funding from the VandenEnde Foundation. Additional pressure has however been placed on these sources as a result of the discontinuation and dismantling of other funding programmes over the past decade, including the Rotterdam Media Fund, Dutch Cultural Media Fund and the CoBO fund.

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[36] These are not intended to be comprehensive analyses: the purpose is to provide the reader with some basic information about conditions in each country to assist with understanding the similarities and differences between them

The Specific Cultural Policy Law (Wet op het specifiek cultuurbeleid) defines the **legal framework** for cultural policy and the conditions under which the state is allowed to allocate specific subsidies for the benefit of works of cultural expression, including funding for film development and production. This is also the legal basis for the creation of the FF. As with all the other markets analysed in this study, The Netherlands transposed the EU regulation to dictate a content quota for on-demand AV services. Since November 2020, in fact, on-demand audiovisual media services must offer at least a 30% share of European works in their catalogues, and European works must be given prominence (Article 3:29c of the Media Act). In addition, there is also a proposal before Senate requiring VOD providers to invest 4.5% of their streaming revenues back in the country.

The Netherlands offers a F**ilm Production Incentive** with up to 35% in form of cash rebate to productions. This can be obtained by international productions if at least 75% of the digital production costs for a feature film are spent on parties subject to Dutch taxation, 25% in the case of a feature- length documentary or 10% in the case of a feature-length animated film. In the case of The Netherlands, the cash rebate can also be obtained if no other Dutch state aid is part of the financing of the film's production, however, the film production must be independent. There is a €1.5m per project cap, and a budget of EUR19.25m for film and EUR13m for high-end series. In order to apply, projects must have a minimum total budget of EUR1m for features and animated film productions and EUR250k for feature documentaries. There is also a request of a minimum in-country spend of EUR150k for features and at least 50% of the financing should be committed on application. Eligible applications are ranked based on a points system, a minimum of 75 points out of 210 is required. Applying for only post-production activities is also possible.

7.2. Denmark

Denmark is a country with a strong film industry known for its strong brand and talent. Danish film is renowned and celebrated internationally, thanks to the work of Thomas Vinterberg (*Another Round, The Hunt*), Lars Von Trier (*Breaking the Waves, Europa, Nymphomaniac*), Susanne Bier (*Love is All You Need*), Mikkel Norgaard (*Hemel*), Nicolas Windig Refn (*The Neon Demon, Drive*). The key Danish film festival is the documentary-focused CPH-DOX, and the National Film School of Denmark is the leading institution providing education and professional development for talent nationally.

Between 2020 and 2022, the country produced **272 feature films**, many of which featured in international film festivals. Most notably, *Another Round* (2020) won an Academy Award for *Best International Feature Film* and was nominated in the *Best Director* category.

The main body supporting the industry is the **Danish Film Institute (DFI).** Based in Copenhagen, it supports professionals across projects' lifecycle, by funding development, production and dissemination of works. In terms of production support, the DFI has three main subsidy schemes: the Commissioner Scheme for artistically innovative films, the Market Scheme for films with broad audience appeal, and the Minor Co-production Scheme for international projects with a Danish partner.

As highlighted in DFI's annual report[37], in 2022, the subsidy distributed by the film fund to films for their development, production and distribution was EUR 42.2m. When including investment such as support for festivals, cinemas and audience development, the investment

[37] *Facts and Figures Danish Films in 2022*. Danish Film Institute, 2023. Accessible at: https://www.dfi.dk/files/docs/2023-06/Facts%20and%20Figures%202023_DanishFilmInstitute.pdf

incurred was of EUR 62.7m. The organisation reports that the budget for 2023 is slightly lower than 2022 (EUR 60.2m).

When looking at the total amount spent in 2022 supporting the production of feature fiction films, we notice that the DFI invested 27.1m across 27 productions. Data published also report that in 2022 the average production budget for a Danish feature film was EUR2.9m and the average subsidy allocation was 43%.

Beyond the DFI, Danish filmmakers can receive support from the *Nordisk Film & TV Fond* – a pan-Nordic fund that promotes high-quality audiovisual productions by providing funding in the form of top financing for the production of feature films, television series and creative documentaries in the five Nordic countries. In addition, the country also has three regional film funds providing development and production support: *Vestdanske Filmpulje* (West Danish Film Fund), *FilmFyn* (Funen Film Fund), and the *Copenhagen Film Fund*.

In terms of the **legislative framework** regulating and supporting the film and television sector, Denmark's *Film Act 1997* is the current legal basis used to define the roles of Government and the Film Institute, which is effectively acting in an arm's length body principle. In addition to that, every 5 years, the government lays out a new *Film and Television Agreement*, to set targets, levels of funding, and to adjust to any changes needed in the relationship between the government, DFI, the public service broadcasters (DR and TV2), and streaming services. The current one is the Media Agreement 2022-2025. As many other EU countries, Denmark transposed the EU regulation for on-demand AV services, by requesting that they should at least a 30% share of European works in their catalogues, and that European works must be given prominence. Similarly, Denmark also developed legislation for investment obligations for VOD providers. Currently, all streaming services are required to pay a fixed contribution of 2% of their revenue in Denmark, which will be allocated to support Danish film and TV production. Streaming services that do not invest at least 5% of their revenue in Danish content will be subject to an additional contribution of 3% (Media Agreement 2023-2025).

Denmark currently does not have a national production incentive scheme.

7.3. Sweden

Similarly, to Denmark, Sweden has also managed to become well known internationally for its high-quality film productions. Film directors such as Ruben Ostlund (*The Square, Triangle of Sadness*), Hannes Holm (*A Man Called Ove*), Felix Herngren (*The 100-Year-Old Man Who Climbed Out the Window and Disappeared*) and Alf Sjöberg (*Torment, Miss Julie*) allowed the country to compete for prizes and awards at key international events, such as Cannes, European Film Awards and Academy Awards.

Noteworthy national film festivals are the Uppsala Short Film Festival and the Goteborg International Film Festival, while key institutions providing training for Swedish filmmakers are HDK-Valad, the Stockholm Film School and the Stockholm Academy of Dramatic Arts. Between 2010 and 2022, the country produced **360 feature films** – making Sweden the most active country among those analysed after The Netherlands.

The national organisation supporting the film industry is the **Swedish Film Institute** (SFI), which provides support for development, production and distribution of new features. It also plays a central role in connecting audiences to the Swedish film heritage and preserving it. SFI's annual report[38] shows that in 2022 the organisation supported 16 Swedish feature films though

[38] *Facts and Figures 2022*. SFI, 2023. Accessible at: https://www.filminstitutet.se/contentassets/419b056ac76b4ec698ef1e88417e4d83/facts-and-figures-2022-.pdf

its commissioner or market funding. Data shows that the average budget of these films was of MSEK 30.6 (EUR2.6m). The level of investment allocated to each project is unclear, but data from the annual report highlight that the **total investment** Swedish feature film by SFI in 2022 was of MSEK489 (EUR 41.8m).

Beyond SFI, Sweden has then a number of public bodies and organisations supporting the national film industry. This includes the *Nordisk Film & TV Fond* (also mentioned above), and a number of regional/local film agencies, such as *Film Stockholm*, *Film i Väst, Filmpool Nord*, (which includes *Filmpool Nord Development, Film Arc* and *Swedish Lapland Film Commission*), *Film pa Gotland, Southern Sweden Film Commission, Film i Skåne.*

In terms of the **legislative framework** regulating and supporting the film and television sector, Sweden historically had a structure fairly similar to the Danish system, with national legislation (Government Bill 2015/16:132), regular policy documents or visions dictating direction, and an arm's length relationship with the SFI. Since 2017, the model switched and now the budget responsibility for the film institute is held by the government, which also administers the film incentive. As did Denmark, Sweden also transposed the EU regulation for on-demand AV services, by requesting that they should at least have a 30% share of European works in their catalogues, and that European works must be given prominence. However, the country is yet to establish investment obligations for VOD providers active in Sweden.

Sweden introduced in 2022 a **25% production rebate** for feature films, documentaries, and television series, open to both national and international companies. The amount available per year is 100 million Swedish krona (EUR 8.6m). In order to be eligible for the scheme, productions have to have a total budget of at least 30 million Swedish krona (EUR 2.5m) for feature films, at least 10 million Swedish kronor (EUR 0.8m) for documentary films, at least 10 million Swedish krona per episode for drama series (EUR 0.8m) or at least 5 million Swedish kronor per episode for documentary series. There is no cap on the amount a single company can receive. Calls for funding are currently announced twice a year (May and September). When first introduced in November 2022, the scheme received a high number of applications.

7.4. Belgium

Belgium is a bi-lingual country divided into the Flemish (Dutch speaking) north and the French-speaking south. This linguistical difference translates to a culture that is effectively home to two different traditions – part of which is homed in the Flemish Region, part in the Walloon and Brussels-Capital Regions. Given the relatively small size of the country and its industry, Belgium often collaborates with France and the Netherlands in the production of films that in many cases have reached international recognition – like in the case of Close (2022), nominated for an Academy Award for Best International Feature Film and winner of the Grand Prize of the Festival at the Cannes Film Festival.

Key talent from the Flemish part of Belgium include Adil El Arbi and Bilall Fallah (*Patser*), Michael R. Roskam (*Bullhead*), Stijn Coninx (*Marina*), Felix van Groeningen (*The Broken Circle Breakdown, The Eight Mountains*), Lukas Dhont (*Girl, Close*). Key talent from the French-speaking part include Jean-Pierre and Luc Dardenne (*The Kid with Bike*), Jaco Van Dormael (*The Brand New Testament*), Joachim Lafosse (*The Restless*), Solange Cicurel (*Isn't She Lovely*). Between 2010 and 2022 Belgium produced **264 features**.

This variegated political and cultural richness is reflected by the number of institutes, public bodies and education providers supporting the film sector in the country. Key film schools in the country are LUCA School of Arts, the Royal Institute for Theatre, Cinema & Sound (RITCS). The Royal Academy of Fine Arts of Ghent (KASK), the Institute des Arts de Difussion (IAD), and the Institut national superieur des arts du spectacle (INSAS).

The main institute devoted to the development of film and film culture in the Flemish part of the country is the **Flanders Audiovisual Fund (VAF)**. The institute provides training, promotion and production support for feature films, television series and video games. It annually receives a EUR 12.5m grant of the Flanders government and a minimum of 78% of this annual budget goes to production support.[39] Screen Flanders is a parallel institution administering the Screen Flanders Economic Fund, a pot offering EUR 400k of refundable advances as an economic support to cover audiovisual expenses for productions spending at least EUR 250k in the region. The Region also has a Film Commission providing information and services to incoming productions, and a Cinematek focusing on the preservation and promotion of film.

In the French speaking part of the country, which includes the Walloon and the Brussels-Capital Regions, the key organisation supporting the film sector is the **Cinema and Audiovisual Centre for the Wallonia-Brussels Federation (CFWB/CCA)**. The institute provides support for writing, development, production and postproduction of feature, short and experimental films. In 2022 the Cinema Commission within the CFWB/CCA distributed EUR 12.1 m (the highest amount in the history of the fund) across a total of 186 projects (80 feature films, 31 shorts, 63 documentaries, 12 'film lab'). Support included screenwriting, artistic development, production development, for both major and minor co-productions. In addition, filmmakers active in the region can access support in a number of other sources. This includes the Screen Brussels fund (which distributes up to EUR 500k of refundable advances by way of economic support to cover expenses in the Brussels Capital Region) Wallimage (support productions happening in the Walloon region with up to €400 k) and the TWIST Cluster network (which connects players in the region).

In Belgium, the general **legal framework** for film and audiovisual funding is established by the communities. In the case of Screen Flanders, the legal framework is defined by the Screen Flanders Decree, supplemented by the Ministerial Decree implementing the Screen Flanders Decree. In the Brussel-Capital region, the legal framework for the support provided by Screen Brussels is set by the Screen Brussels Regulation, whereas in Wallonia, the legal framework for the CFWB/CCA is defined by the Decree for support to film and audiovisual works[40]. The country has transposed the EU regulation for on-demand AV services, by requesting that they should at least have a 30% share of European works in their catalogues, and that European works must be given prominence. In addition, the two communities have implemented investment obligations for VOD providers. In the Flanders all streaming services are required to pay either 2% of their revenue in the Flanders or invest an amount that is either a lump sum of EUR 3m or an amount per subscriber. In the French speaking community of Belgium all streaming services are required to pay up to 2.2% of their revenue, with a proportion based on their turnover (higher the turnover, higher the percentage).

In order to incentivise production, Belgium offers a **tax shelter system** for European works and qualifying international co-productions with Belgium or the Belgian Communities. The scheme is a federal investment-driven incentive, with value is dependent on the qualifying expenses made by the producer in Belgium and in the European Economic Area. For an ideal investment, the incentive provides up to 42% of the Belgian expenses to the producer. Allows company that wishes to invest in support of audiovisual works to benefit from a tax saving equal to its payment, plus a return of 5.37%. Investors and production companies must be resident companies or the Belgian establishment of a non-resident company. The maximum amount of

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[39] *Flanders Audiovisual Fund*. Cineregio, 2023. Accessible at: https://www.cineregio.org/members/flanders_audiovisual_fund/

[40] *Mapping of film and audiovisual public funding criteria in the EU*. European Audiovisual Observatory, 2019. Accessible at: https://rm.coe.int/mapping-of-film-and-audiovisual-public-funding-criteria-in-the-eu/1680947b6c

tax sheltered for a single work cannot exceed EUR 7.25m and there are no minimum expenditure thresholds.

7.5. Austria

In the past years Austria has enjoyed a boost to its international production profile thanks to the introduction of an attractive rebate. That said, the national industry is relatively small – mirroring the size of the country. Key recurring talent in Austria includes Michael Haneke (*Amour, Happy End, Funny Games*), Ulrich Seidl (*Dog Days, Faith*), and Andreas Prochaska (*The Dark Valley*). The last productions to receive notable prizes at international competitions were two films by Michael Haneke: *Amour* (2012), which won the Palm d'Or at the 2012 Cannes Film Festival and was nominated Best Foreign Language Film at the Academy Awards, and *The White Ribbon* (2009), which also won the Palm d'Or at Cannes in 2009 and received two nominations at the Academy Awards. Between 2010 and 2022 Austria produced **204 titles**.

The main film institute supporting the sector is the **Austrian Film Institute (Österreichisches Filminstitut or ÖFI**), which provides support for development, production, distribution and training of professionals. In 2022 the Austrian Film Institute distributed EUR 15.7m to 140 projects (incl. animated, documentary and feature films)[41]. This included support for screenwriting and initial development, production development support and production.

Beyond the Austrian Film Institute, at a federal level, there are four more main operating funds in the country[42]. These are: the ORF/Film-Fernsehabkommen operated by the Austrian Broadcasting Corporation ORF; the Bundeskanzleramt distributed by the Federal Chancellery; the Fernsehfonds Austria197 (Austrian Television Fund) set up and managed by the Rundfunk und Telekom Regulierungs-GmbH (Austrian Broadcasting and Telecommunications Regulatory Authority, RTR) providing support with an annual budget of EUR 13.5m; and the Filmstandort Austria (FISA or Film Industry Support Austria) – a subsidy programme created by the Austrian Federal Ministry for Digital and Economic Affairs in order to support the production of cinema films and to provide an ongoing stimulus for Austria as a film location. There is then a high number of local or national funding opportunities managed by provincial authorities and their linked film commissions.

Each film fund in Austria is regulated by **legislation** at federal or state level and supplemented by relevant guidelines. For the Austrian Film Institute, the core legislation lies in the Film Funding Act. As with all the other countries analysed in this study, Austria transposed the EU regulation on content quota for on-demand AV services. That said, the country has not introduced any investment obligations for VOD providers.

Austria has a **production incentive scheme** which provides up to 30% of the eligible expenses in the form of non-repayable grants, plus a 5% bonus in case the production reaches a certain standard of environmental sustainability. Applications can be submitted continuously. There is a EUR 5m cap for film or single episode and EUR 7.5m cap for series or series season. Minimum total production costs apply for Austrian films and series (EUR 1.8m for features and EUR 600k per episode for series), which differ from the minimum qualifying expenditure threshold requested to international and service production companies (EUR €150 for films or series; EUR 80k for documentary films or series; EUR 25k for post-production, animation and digital effects).

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[41] Annual Report 2022. Austrian Film Institute, 2023. Accessible at: https://filminstitut.at/en/institute/annual-reports

[42] *Mapping of film and audiovisual public funding criteria in the EU*. European Audiovisual Observatory, 2019. Accessible at: https://rm.coe.int/mapping-of-film-and-audiovisual-public-funding-criteria-in-the-eu/1680947b6c

8. APPENDIX 2 – HIGH EXCELLENCE MATRIX

The following are summaries of the full matrix, which was assembled for all five countries (Denmark, Sweden, Belgium, Austria and Netherlands). These tables only detail the listings relevant to the High Excellence analysis as the original data set is a robust collection of all feature films from across the time period of the study.[43] As the Netherlands have no films that met the High Excellence parameters, there is no matrix summary included, however the Top 20 matrix for the Netherlands is included in *Chapter 4* (Table 5) for reference.

8.1. Denmark

	Original Title	Producing Country(s)	Year	Director(s)	European Admissions	National Admissions	Festivals	Selection	Award	Awards Nominations/Wins	Nomination	Award
1	*Druk (Another Round)*	DK, SE, NL	2020	Thomas Vinterberg	2 939 686	842 502	Cannes Film Festival - **In Competition**	1	0	European Film Awards - **Best film (won)** Academy Awards - **Best International feature film (won)**	0	2
2	*Jagten (The Hunt)*	DK, SE	2012	Thomas Vinterberg	1 739 067	673 855	Cannes Film Festival - **In Competition**	1	0	European Film Awards - **Best film (nom)** Academy Awards - **Best International feature film (nom)**	2	0
3	*Melancholia*	DK, SE, FR, DE, IT	2011	Lars von Trier	1 637 953	56 687	Cannes Film Festival - **In Competition**	1	0	European Film Awards - **Best European film (won)**	-	1

[43] Lumiere database used for admissions (2010-2022). Lumiere categorises European Admissions as EU27+GB, which includes the listed National EU countries plus the United Kingdom, which was used as the primary source, as well as EU OBS (European Observatory Data), which was used in the case that EU27+GB was not available.

4	*Den skaldede frisør (Love is All You Need)*	DK, SE, FR, DE, IT	2012	Susanne Bier	1 497 936	643 842	None	0	0	European Film Awards - **Best Comedy (won)**	-	1
5	*En kongelig affære (A Royal Affair)*	DK, SE, CZ	2012	Nikolaj Arcel	1 302 872	527 992	Berlinale - **In Competition**	1	0	Academy Awards - Best International feature film (nom)	1	0
6	*Nymphomani ac - Vol I*	DK, DE, FR, BE	2013	Lars von Trier	1 275 684	33 489	None	0	0	European Film Awards - **Best film (nom)**	1	0
7	*Hævnen(In a Better World)*	DK, SE, DE	2010	Susanne Bier	1 208 117	406 435	None	0	0	European Film Awards - Best film (nom) **Academy Awards - Best International feature film (won)**	1	1
8	*Only God Forgives*	DK, FR, TH, US, SE	2013	Nicolas Winding Refn	1 106 665	26 424	Cannes Film Festival - In Competition	1	0	None	0	0
9	*Den skyldige (The Guilty)*	DK	2018	Gustav Möller	879 174	140 674	Sundance Film Festival World Cinema Dramatic Competition - Grand Jury Prize Selection **World Cinema Dramatic Competition - Audience Award**	1	1	European Film Awards - **Selection**	1	0
10	*Retfærdighed ens ryttere (Riders of Justice)*	DK	2020	Anders Thomas Jensen	859 452	605 837	None	0	0	European Film Awards - **Selection**	1	0

11	*Kollektivet (The Commune)*	DK, SE, NL	2016	Thomas Vinterberg	674 500	301 278	Berlinale - **In Competition**	1	0	European Film Awards - **People's Choice Award (nom)**	1	0
12	*Nymphomaniac: Vol. II*	DK, DE, FR	2013	Lars von Trier	556 380	20 051	*Shared with Nymphomaniac - Vol I*	0	0	*Shared with Nymphomaniac - Vol I*	0	0
13	*Dronningen (Queen of Hearts)*	DK, SE	2019	May el-Toukhy	477 669	333 486	Sundance Film Festival **World Cinema Dramatic Competition - Audience Award**	-	1	European Film Awards - **Selection**	1	0
14	*The House That Jack Built*	DK, FR, DE, SE	2018	Lars von Trier	353 509	29 884	None	0	0	European Film Awards - **Selection**	1	0

8.2. Sweden

	Original Title	Producing Country(s)	Year	Director(s)	European Admissions	National Admissions	Festivals	Selection	Award	Awards Nominations/Wins	Nomination	Award
1	*Hundraåringen som klev ut genom fönstret och försvann (The 100-Year-Old Man Who Climbed Out the Window and Disappeared)*	SE	2013	Felix Herngren	4 512 360	681 944	Berlinale - **Special Galas Selection**	1	0	European Film Awards - **People's Choice Award (nom)**	1	0

2	*En man som heter Ove (A Man Called Ove)*	SE, NO	2015	Hannes Holm	2 944 347	1 714 994	None	0	0	European Film Awards - **Best Comedy (won)** European Awards - **People's Choice Award (nom)**	1	1
3	*Triangle of Sadness*	SE, DE, FR, GB, MX, TR, GR, US, DK, CH	2022	Ruben Östlund	2 048 370	143 535[44]*	Cannes Film Festival - **Palme d'Or (win)**	-	1	European Film Awards - **Best film (won)** Academy Awards - **Best picture (nom)**	1	1
4	*The Square*	SE, DE, FR, DK	2017	Ruben Östlund	1 729 000	192 302	Cannes Film Festival - **Palme d'Or (win)**	-	1	European Film Awards - **Best film (won)** European Awards - **Best comedy (won)** Academy Awards - Best foreign language (nom)	1	2
5	*Unge Astrid (Becoming Astrid)*	SE, DK	2018	Pernille Fischer Christensen	909 002	191 013	Berlinale - **Special Galas Selection**	1	0	None	0	0

[44] Data used in High Excellence Matrix collected from Lumiere EU27+1 OBS admissions numbers
**2022 SE national admissions data was not available for 'Walad Min Al Janna'. 2022 SE national admissions data for 'Triangle of Sadness' was sourced from Nordisk Film and TV Fund Annual Admissions for Sweden 2022 (*Annual Admissions Chart.* 2023. Accessible at: https://nordiskfilmogtvfond.com/assets/news/Sweden-2022-Annual-Admissions-Charts.pdf)

6	*Turist (Force Majeure)*	SE, DK, FR, NO	2014	Ruben Östlund	895 731	187 892	Cannes Film Festival - **Un Certain Regard (win)**	-	1	European Film Awards - **Best Film (nom)** European Awards - **People's Choice Award (nom)**	2	1
7	*Borg McEnroe*	SE, DK, FI	2017	Janus Metz	877 637	244 728	None	0	0	European Film Awards - **People's Choice Award (nom)**	1	0
8	*The Nile Hilton Incident*	SE, DK, DE, FR	2017	Tarik Saleh	607 050	45 685	Sundance Film Festival - **World Cinema Grand Jury Prize Dramatic (won)**	-	1	European Film Awards - **Best film (nom)**	1	0
9	*Gräns (Border)*	SE, DK	2018	Ali Abbasi	532 557	138 836	Cannes Film Festival - **Un Certain Regard (win)**	-	1	European Film Awards - **People's Choice Award (nom)**	1	0
10	*Walad Min Al Janna (Boy from Heaven)*	SE, FR, FI, DK	2022	Tarik Saleh	494 556	Not available*	Cannes Film Festival - **Palme d'Or (nom)**	1	0	None	0	0

8.3. Belgium

	Original Title	Producing Country(s)	Year	Director(s)	European Admissions	National Admissions	Festivals	Selection	Award	Awards Nominations/Wins	Nomination	Award

1	*Le tout nouveau testament (The Brand New Testament)*	BE, LU, FR	2015	Jaco van Dormael	2 225 270	297 621	Cannes Film Festival - **Directors' Fortnight (nom)**	1	0	European Film Awards - **European Comedy (nom)** European Film Awards - **People's Choice Award (nom)**	2	0
2	*Le gamin au vélo (The Kid with a Bike)*	BE, FR, IT	2011	Jean-Pierre Dardenne, Luc Dardenne	1 479 242	142 894	Cannes Film Festival - **In Competition Grand Prix (won)**	-	1	European Film Awards - **Best Film (nom)**	1	0
3	*Deux jours, une nuit (Two Days, One Night)*	BE, FR, IT	2014	Jean-Pierre Dardenne, Luc Dardenne	1 174 394	62 127	Cannes Film Festival - **In Competition**	1	0	European Film Awards - **People's Choice Award (nom)**	1	0
4	*The Broken Circle Breakdown*	BE, NL	2012	Felix Van Groeningen	1 045 222	427 135	Berlinale - **Panorama Audience Award (won)**	-	1	European Film Awards - **Best Film (nom)** Academy Awards - **Best International Feature Film (nom)**	2	0
5	*Girl*	BE, NL	2018	Lukas Dhont	952 944	304 605	Cannes Film Festival - **Un Certain Regard (nom)**	1	0	European Film Awards - **Best Film (nom) European Discovery (won)** European Film Awards - **People's Choice Award (nom)**	2	1

6	*Rundskop (Bullhead)*	BE	2011	Michael R. Roskam	566 318	454 681	Berlinale - **Panorama**	1	0	Academy Awards - **Best International Feature Film (nom)**	1	0
7	*Close*	BE, FR, NL	2022	Lukas Dhont	560 031	214 544	Cannes Film Festival - **Palme d'Or 2022 (nom)**	1	0	Academy Awards (Nom) European Film Award (Nom)	2	0
8	*Hasta la Vista! (Come As You Are)*	BE	2011	Geoffrey Enthoven	540 171	253 235	None	0	0	European Film Awards - **People's Choice Award (won)**	-	1
9	*La fille inconnue (The Unknown Girl)*	BE, FR	2016	Jean-Pierre Dardenne, Luc Dardenne	427 930	28 093	Cannes Film Festival - **In Competition**	1	0	None	0	0
10	*L'économie du couple (After Love)*	BE, FR	2016	Joachim Lafosse	341 852	19 132	Cannes Film Festival - **Directors' Fortnight**	1	0	None	0	0
11	*Le jeune Ahmed (Young Ahmed)*	BE, FR	2019	Jean-Pierre Dardenne, Luc Dardenne	267 041	34 608	Cannes Film Festival - **In Competition**	1	0	European Film Awards - **Selection**	1	0

8.4. Austria

	Original Title	Producing Country(s)	Year	Director(s)	European Admissions	National Admissions	Festivals	Selection	Award	Awards Nominations/Wins	Nomination	Award
1	*Wilde Maus (Wild Mouse)*	AT, DE	2017	Josef Hader	549 787	264 742	Berlinale - **In Competition**	1	0	European Film Awards - **Selected**	1	0
2	*Die Wand (the Wall)*	AT, DE	2012	Julian Pölsler	497 371	82 766	Berlinale - **Panorama Ecumenical Jury Prize (Won)**	-	1	None	0	0
3	*Corsage*	AT, LU, DE, FR	2022	Marie Kreutzer	347 442	54 781	Cannes Film Festival - **Un Certain Regard (Nom)**	1	0	European Film Award (Nom)	1	0
4	*Paradis: Amour (Paradise: Love)*	AT, DE, FR	2012	Ulrich Seidl	283 020	48 803	Cannes Film Festival **- In Competition**	1	0	European Film Awards - **Selection**	1	0
5	*Das finstere Tal (The Dark Valley)*	AT, DE	2014	Andreas Prochaska	264 996	155 163	Berlinale - **Berlinale Special Galas Selection**	1	0	None	0	0

9. APPENDIX 3 – ABOUT OLSBERG•SPI

Olsberg•SPI is an international creative industries consultancy, specialising in the global screen sector.

SPI provides a range of expert consultancy and strategic advisory services to public and private sector clients in the worlds of film, television, video games and digital media. Formed in 1992, it has become one of the leading international consultancies in these dynamic creative screen industries.

The firm's expert advice, trusted vision and proven track record create high levels of new and repeat business from a diverse group of companies and organisations, including:

- National governments, including culture and economics ministries
- National film institutes and screen agencies l Regional and city development agencies and local authorities
- Multi-national cultural funds and authorities
- National and regional tourism agencies
- Established studios and streamers
- Independent companies at all points of the screen business value chain
- National and international broadcasters
- Trade associations and guilds
- Training and skills development organisations
- Publishers and conference organisers.

With expertise in all areas of the fast-moving global creative sector, SPI offers a wide range of services, including:

- Analysis and strategic advice for building healthy and sustainable national and regional industries, and recommendations for public policies to support this
- Mapping and assessment of physical infrastructure, services, and workforce
- Delivering economic impact studies of whole sector activity or of incentives
- Advice on the creation of fiscal incentives for screen productions
- Helping businesses and governments interpret the strategic implications of digital media innovations
- Business development strategies for content companies
- Feasibility studies, marketing, and business strategies for small and large-scale studio facilities
- Evaluations of publicly funded investment schemes
- Acquisition and divestment advice for owners or managers of SMEs
- International cost comparisons for small and large film and television productions
- Strategic advice on inward investment and exports for national and regional public bodies
- Analysing and explaining the links between growth in tourism and a nation's film and television output
- Providing strategic advice for screen commissions, including business and marketing plans
- Keynote speakers at industry events.

Further information on SPI's work can be found at www.o-spi.com and within the SPI Company Brochure.

Please **contact Emma Openshaw** on emma@o-spi.com for further information about this study.

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The strategy consultancy for the creative industries