



EUROPEAN COMMISSION
Information Society and Media Directorate-General
Audiovisual, Media, Internet
MEDIA Programme and media literacy

Audiovisual Cooperation Programme "MEDIA MUNDUS"

Summary of the results of the public consultation

INTRODUCTION

On 13 December 2007 the European Parliament adopted, in the 2008 budget, a preparatory action "MEDIA International" to focus on relations with third countries' audiovisual markets. This preparatory action provides the opportunity to test further action for structuring and strengthening relations and networks between EU and third countries' audiovisual markets.

In the presence of European Commission President José Manuel Barroso, and on the invitation of Commissioner Reding, Ministers in charge of audiovisual matters in the European Union and the EFTA countries met informally on 19 May 2008, in the context of the Europe Day at the Cannes Film Festival. They adopted a declaration welcoming the initiative of the European Parliament on the "MEDIA International" preparatory action and encouraging the Commission *"to pursue the development of this initiative and to examine the desirability and the possibility of presenting, before the end of the year, a proposal for a support programme to promote cooperation between European audiovisual industry professionals and industry professionals in third countries for the mutual benefit of all participants."*¹

The added value gained by such a preparatory action for the European audiovisual market could lead the Commission to adopt a proposal for a new programme "MEDIA MUNDUS". The new programme would be an important initiative to increase the competitiveness of the audiovisual sector and to contribute to the implementation of the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expression, ratified by the European Community together with 12 Member States on 18 December 2006².

In order to collect input from professionals and other stakeholders at an early stage, the Commission carried out a public consultation between 10 April and 25 June 2008. The consultation followed Commission guidelines³ and was open to any interested party both

¹ See: http://ec.europa.eu/avpolicy/docs/ext/cannes_2008_en.pdf

² See: <http://unesdoc.unesco.org/images/0014/001429/142919e.pdf>

³ See: http://ec.europa.eu/governance/impact/docs/key_docs/sec_2005_0791_en.pdf

within and beyond the boundaries of the European Union. The main tool used to collect input was an online questionnaire (Interactive Policy Making Tool, IPM). The majority of questions were asked on a multiple-choice basis. The last two questions invited the respondents to indicate additional action lines and to give general comments. The questionnaire was available in English, French, German, Portuguese and Spanish.

In total, the Commission received 259 responses. 120 stakeholders made use of the opportunity to give comments and to suggest additional action lines.

The findings of the consultation, which forms part of a broad consultation process, will serve as a basis for the possible design of a future programme "MEDIA MUNDUS". In addition to the online consultation, the Commission organised a Public Hearing in Brussels on 25 June 2006 and contributed to the Conference "Cinéma, Europe, Monde: Quelle politique de coopération cinématographique pour l'UE?" of the French EU Presidency on 8 July in Paris. Moreover, on the invitation of the German Filmförderanstalt, a bilateral informal meeting took place in Berlin on 19 June 2008, where the Commission presented the initiative and discussed its possible action lines with national stakeholders.

This report analyses the responses and contributions received in the context of the online consultation.

RESULTS OF THE PUBLIC CONSULTATION

1. RESPONSES RECEIVED

The Commission received 259 contributions to the online survey. The great majority of respondents replied on behalf of an organisation or as a professional (82.2 %) and only 17.8 % as individuals. More specifically, most of the respondents indicated "producer" as their main field of activity (51.4 %), followed by distributors (15.1 %). The remarkable number of training institutions that contributed to the consultation (12 %) should be noted.

Table 1: Type of organization / profession (respondents could select up to three categories)

Type of respondent	Number of responses	% of responses
Producer	133	(51.4%)
Distributor	39	(15.1%)
Director	35	(13.5%)
Other category	34	(13.1%)
Training Institution	31	(12%)
Government/Public body	24	(9.3%)
Private Consultant/Advisor	22	(8.5%)
Association	22	(8.5%)

Supranational Organisation	17	(6.6%)
Video editor	11	(4.2%)
Sales Agent	11	(4.2%)
Funding Agency	11	(4.2%)
Owner of Cinema	5	(1.9%)
Public broadcaster	4	(1.5%)
VOD Platform	4	(1.5%)
Private Broadcaster	3	(1.2%)
Internet Provider	3	(1.2%)
Technical Industries	2	(0.8%)

A number of replies came from governmental or other public bodies. The public authorities responsible for media affairs and funding agencies of the Member States making a submission are:

Beauftragter der Bundesregierung für Kultur und Medien - Germany;
 Bundesministerium für Unterricht, Kunst und Kultur – Austria;
 Centre Nationale de la Cinématographie (CNC) – France;
 Danish Film Institute - Denmark;
 Department for Culture, Media and Sport – UK;
 Dutch Institute for Filmeducation - Netherlands;
 Flemish Community of Belgium, Department of Culture, Youth, Sports and Media - Belgium;
 Malta Film Commission - Malta;
 Ministry for Education, Culture, Youth and Sport - Malta;
 Ministère de la Communauté française, Centre du Cinéma et de l'audiovisuel – Belgium;
 The Swedish Film Institute - Sweden;
 UK Film Council – UK

Most of the responses came from stakeholders in the EU (83.8 %), whereas 16.2 % were received from organisations, professionals and individuals established outside the EU. All continents are represented.

Table 2: Geographical coverage:

Country	Number of responses
Argentina	1
Austria	6
Belgium	8
Benin	1
Bosnia and Herzegovina	3
Brazil	4

Country	Number of responses
Bulgaria	6
Chile	1
China	1
Cyprus	4
Czech Republic	2
Denmark	1

Dominican Republic	1
Finland	7
France	29
Georgia	1
Germany	34
Ghana	1
Greece	3
Hungary	1
India	2
Indonesia	3
Ireland	1
Israel	1
Italy	14
Latvia	1
Lithuania	3
Luxembourg	2
Malta	12
Moldova	1
Morocco	1
Nepal	1
Netherlands	6

Nicaragua	1
Norway	4
Poland	4
Portugal	3
Romania	2
Serbia	2
Slovakia	1
Slovenia	1
South Africa	1
Spain	14
Swaziland	1
Sweden	23
Switzerland	1
Syria	1
Taiwan	2
Turkey	3
United Kingdom	17
USA	4
Others	11
TOTAL	259

2. METHODOLOGY

The online consultation was divided into different question groups according to the possible action lines of the possible future programme: training, distribution, promotion, dubbing and subtitling, co-production, support for the development of cinema networks. These categories were chosen for several reasons. Firstly, within the MEDIA 2007 programme and its predecessors, the Commission has gained positive experience with some of the proposed action lines, which have also been verified in the evaluation of these programmes. Secondly, the action lines of the preparatory action "MEDIA International" were taken as an inspiration for the creation of the questionnaire. Finally, already prior to the drafting of the questionnaire, discussions with stakeholders had taken place, and proposals, for example relating to co-productions, were made. However, the suggestions contained in the questionnaire did not and do not prejudice the form and content of any possible future proposal by the European Commission.

Within the different categories the respondents had the possibility to agree (strongly) or to disagree (strongly) with the potential impact of the proposed measures on improving networking of professionals, increasing cultural diversity, improving access to foreign markets, increasing and facilitating co-productions and making the audiovisual sector more competitive. The option "no opinion" was always given. Furthermore, the respondents were asked to rank the above-

mentioned action lines with regard to their impact on cultural diversity and competitiveness of the audiovisual sector, to indicate additional action lines; they were given the opportunity to make comments.

3. OUTCOMES OF THE CONSULTATION

In general, all proposed action lines received a positive feedback. Several stakeholders explicitly welcomed the initiative in their comments. It is significant that the majority of respondents agreed and even strongly agreed that all proposed action lines would contribute to achieving the above- listed objectives. This indicates a wide consensus on the importance of such an initiative and on enhancing cooperation with third countries' audiovisual markets.

3.1. Feedback on the possible action lines of a new programme

3.1.1. Training

"The objective is to build, through training measures, a deeper understanding of the operating conditions, legal framework and systems of financing of the audiovisual markets in all the countries participating in the proposed project." Respondents were asked to decide whether the following measures would endorse the above-mentioned objective:

- *"A training course or joint training with particular reference to:*
 - *how to establish international co-productions between the third countries and the EU countries participating in the proposed project,*
 - *what are the conditions of production, distribution, exhibition and dissemination of the audiovisual works in all the countries participating in the proposed project"*
- *"EU-funded scholarships for third-country nationals participating in European film schools, as well as scholarships for EU-nationals studying at film schools throughout the world"*

The objective of including an action line on training measures in a possible future "MEDIA MUNDUS" programme received very positive feedback.

The tables show clearly that the great majority of respondents agreed or even strongly agreed that training measures have an important impact on increasing cultural diversity and competitiveness. Regarding the two sub-action lines, scholarships for third-country nationals were slightly more controversial. The tables show a tendency to disagree with the influence of scholarships on competitiveness and market shares. 20.9 % of the stakeholders disagreed that scholarships would improve access to foreign markets for professionals. These responses mainly came from professionals, but also some governmental authorities or other public institutions shared this opinion.

Improves networking and the exchange of good practices between professionals	Number of requested records	% requested records
Strongly agree	165	(63.7%)
Agree	89	(34.4%)
No opinion	4	(1.5%)
Disagree	1	(0.4%)
Strongly disagree	0	(0%)
Contributes to greater cultural diversity	Number of requested records	% requested records
Agree	119	(45.9%)
Strongly agree	111	(42.9%)
Disagree	18	(6.9%)
No opinion	9	(3.5%)
Strongly disagree	2	(0.8%)
Improves access to foreign markets	Number of requested records	% requested records
Agree	125	(48.3%)
Strongly agree	101	(39%)
Disagree	19	(7.3%)
No opinion	13	(5%)
Strongly disagree	1	(0.4%)
Facilitates and increases co-productions between third countries and EU Member States	Number of requested records	% requested records
Strongly agree	117	(45.2%)
Agree	113	(43.6%)
Disagree	19	(7.3%)
No opinion	9	(3.5%)
Strongly disagree	1	(0.4%)
Makes the audiovisual sector more competitive	Number of requested records	% requested records
Agree	112	(43.2%)
Strongly agree	81	(31.3%)
No opinion	32	(12.4%)
Disagree	31	(12%)
Strongly disagree	3	(1.2%)

Table 3b: Training: EU-funded scholarships for EU nationals and third-country nationals

Improves networking and the exchange of good practices between professionals	Number of requested records	% requested records
Strongly agree	129	(49.8%)
Agree	108	(41.7%)
Disagree	17	(6.6%)
No opinion	4	(1.5%)
Strongly disagree	1	(0.4%)
Contributes to greater cultural diversity	Number of requested records	% requested records
Strongly agree	129	(49.8%)
Agree	114	(44%)
Disagree	11	(4.2%)
No opinion	4	(1.5%)
Strongly disagree	1	(0.4%)

Improves access to foreign markets	Number of requested records	% requested records
Agree	110	(42.5%)
Strongly agree	75	(29%)
Disagree	51	(19.7%)
No opinion	20	(7.7%)
Strongly disagree	3	(1.2%)
Facilitates and increases co-productions between third countries and EU Member States	Number of requested records	% requested records
Agree	120	(46.3%)
Strongly agree	90	(34.7%)
Disagree	28	(10.8%)
No opinion	18	(6.9%)
Strongly disagree	3	(1.2%)
Makes the audiovisual sector more competitive	Number of requested records	% requested records
Agree	101	(39%)
Strongly agree	63	(24.3%)
No opinion	50	(19.3%)
Disagree	39	(15.1%)
Strongly disagree	6	(2.3%)

3.1.2. Distribution

Respondents were asked to give feedback on a possible future action line focussing on distribution. Suggested measures were: *"The stimulation of the conclusion of agreements between distributors/exporters/rights-holders of EU countries and distributors/exporters/rights-holders of third countries (via, for example, events, co-production markets), to ensure and promote the exclusive first release of their respective films on the territory/territories of their partner(s)".*

The vast majority of respondents indicated that measures on distribution improve the exchange of good practices, increase cultural diversity, improve access to foreign markets, facilitate co-production and would make the audiovisual sector more competitive. The results of all five questions in this question group are very similar. An average of 44.6 % of the respondents agreed, and an average of 42.4 % strongly agreed that the suggested measures regarding distribution would have an impact on these fields. The highest "disagree" rate (10.9 %) was achieved on the question as to whether these distribution measures would make the audiovisual sector more competitive. However, 77.2 % still agreed (strongly) that that would be the case.

Table 4: Distribution

Improves networking and the exchange of good practices between professionals	Number of requested records	% requested records
Agree	121	(46.7%)
Strongly agree	119	(45.9%)
No opinion	11	(4.2%)
Disagree	7	(2.7%)
Strongly disagree	1	(0.4%)
Contributes to greater cultural diversity	Number of requested records	% requested records
Strongly agree	118	(45.6%)
Agree	110	(42.5%)
No opinion	18	(6.9%)
Disagree	12	(4.6%)
Strongly disagree	1	(0.4%)
Improves access to foreign markets	Number of requested records	% requested records
Strongly agree	128	(49.4%)
Agree	111	(42.9%)
No opinion	11	(4.2%)
Disagree	8	(3.1%)
Strongly disagree	1	(0.4%)
Facilitates and increases co-productions between third countries and EU Member States	Number of requested records	% requested records
Agree	115	(44.4%)
Strongly agree	104	(40.2%)
No opinion	21	(8.1%)
Disagree	17	(6.6%)
Strongly disagree	2	(0.8%)
Makes the audiovisual sector more competitive	Number of requested records	% requested records
Agree	120	(46.3%)
Strongly agree	80	(30.9%)
No opinion	31	(12%)
Disagree	25	(9.7%)
Strongly disagree	3	(1.2%)

3.1.3. Promotion

With a view to drafting possible action lines on promotion, respondents were invited to give their opinion on the following measures: *"Raising of public awareness through the support of information and advertising campaigns for the release of films from Europe and third countries covered by a mutual distribution agreement"* and *"supporting the promotion and broadcasting of films on TV"*.

The tables show a similar picture as the results of the previous questions. Between approx. 66 % (potential impact of promotion measures for films on TV on the improvement of networking) and approx. 90 % (potential impact of promotion campaigns for films on cultural diversity) of the respondents agreed strongly that such an action line would positively influence the audiovisual sector. Some 20.5 % stakeholders disagreed when asked if a focus on the promotion and broadcasting of films on TV would improve networking and exchanges between professional and expressed the highest

percentage of disapproval in that question group. In general, an action line that targets the promotion on TV received slightly lower results than the promotion of films for cinema exhibition.

Table 5a: Promotion: Raising awareness

Improves networking and the exchange of good practices between professionals	Number of requested records	% requested records
Agree	106	(40.9%)
Strongly agree	92	(35.5%)
Disagree	35	(13.5%)
No opinion	24	(9.3%)
Strongly disagree	2	(0.8%)
Contributes to greater cultural diversity	Number of requested records	% requested records
Strongly agree	121	(46.7%)
Agree	113	(43.6%)
Disagree	12	(4.6%)
No opinion	10	(3.9%)
Strongly disagree	3	(1.2%)
Improves access to foreign markets	Number of requested records	% requested records
Strongly agree	121	(46.7%)
Agree	99	(38.2%)
Disagree	22	(8.5%)
No opinion	14	(5.4%)
Strongly disagree	3	(1.2%)
Facilitates and increases co-productions between third countries and EU Member States	Number of requested records	% requested records
Agree	107	(41.3%)
Strongly agree	83	(32%)
Disagree	42	(16.2%)
No opinion	25	(9.7%)
Strongly disagree	2	(0.8%)
Makes the audiovisual sector more competitive	Number of requested records	% requested records
Agree	104	(40.2%)
Strongly agree	94	(36.3%)
Disagree	28	(10.8%)
No opinion	27	(10.4%)
Strongly disagree	6	(2.3%)

Table 5b: Promotion: Promotion and broadcasting of films on TV

Improves networking and the exchange of good practices between professionals	Number of requested records	% requested records
Agree	95	(36.7%)
Strongly agree	76	(29.3%)
Disagree	53	(20.5%)
No opinion	31	(12%)
Strongly disagree	4	(1.5%)
Contributes to greater cultural diversity	Number of requested records	% requested records

Strongly agree	119	(45.9%)
Agree	112	(43.2%)
Disagree	15	(5.8%)
No opinion	10	(3.9%)
Strongly disagree	3	(1.2%)
Improves access to foreign markets	Number of requested records	% requested records
Agree	114	(44%)
Strongly agree	104	(40.2%)
Disagree	19	(7.3%)
No opinion	19	(7.3%)
Strongly disagree	3	(1.2%)
Facilitates and increases co-productions between third countries and EU Member States	Number of requested records	% requested records
Agree	106	(40.9%)
Strongly agree	78	(30.1%)
Disagree	39	(15.1%)
No opinion	29	(11.2%)
Strongly disagree	7	(2.7%)
Makes the audiovisual sector more competitive	Number of requested records	% requested records
Agree	105	(40.5%)
Strongly agree	83	(32%)
No opinion	37	(14.3%)
Disagree	28	(10.8%)
Strongly disagree	6	(2.3%)

3.1.4. Dubbing and Subtitling

In the next category the Commission proposed a future action line on dubbing and subtitling of feature films and TV films and asked for feedback. Some respondents were critical in their comments of the questionnaire not distinguishing between dubbing on the one hand and subtitling on the other. From their perspective, subtitling is more likely to increase cultural diversity and therefore should be ranked higher than dubbing. However, the majority of stakeholders still agreed on the positive impact of these actions.

Table 6a: Dubbing and subtitling of feature films:

Improves networking and the exchange of good practices between professionals	Number of requested records	% requested records
Agree	97	(37.5%)
Strongly agree	72	(27.8%)
Disagree	47	(18.1%)
No opinion	38	(14.7%)
Strongly disagree	5	(1.9%)
Contributes to greater cultural diversity	Number of requested records	% requested records
Strongly agree	117	(45.2%)
Agree	105	(40.5%)
Disagree	18	(6.9%)
No opinion	16	(6.2%)
Strongly disagree	3	(1.2%)

Improves access to foreign markets	Number of requested records	% requested records
Strongly agree	125	(48.3%)
Agree	101	(39%)
No opinion	17	(6.6%)
Disagree	14	(5.4%)
Strongly disagree	2	(0.8%)
Facilitates and increases co-productions between third countries and EU Member States	Number of requested records	% requested records
Agree	105	(40.5%)
Strongly agree	80	(30.9%)
Disagree	35	(13.5%)
No opinion	34	(13.1%)
Strongly disagree	5	(1.9%)
Makes the audiovisual sector more competitive	Number of requested records	% requested records
Agree	104	(40.2%)
Strongly agree	81	(31.3%)
No opinion	38	(14.7%)
Disagree	31	(12%)
Strongly disagree	5	(1.9%)

Table 6b: Dubbing and subtitling of TV films:

Improves networking and the exchange of good practices between professionals	Number of requested records	% requested records
Agree	97	(37.5%)
Strongly agree	66	(25.5%)
Disagree	52	(20.1%)
No opinion	39	(15.1%)
Strongly disagree	5	(1.9%)
Contributes to greater cultural diversity	Number of requested records	% requested records
Agree	110	(42.5%)
Strongly agree	109	(42.1%)
Disagree	20	(7.7%)
No opinion	17	(6.6%)
Strongly disagree	3	(1.2%)
Improves access to foreign markets	Number of requested records	% requested records
Strongly agree	113	(43.6%)
Agree	108	(41.7%)
Disagree	19	(7.3%)
No opinion	16	(6.2%)
Strongly disagree	3	(1.2%)
Facilitates and increases co-productions between third countries and EU Member States	Number of requested records	% requested records
Agree	103	(39.8%)
Strongly agree	75	(29%)
Disagree	42	(16.2%)
No opinion	32	(12.4%)
Strongly disagree	7	(2.7%)

Makes the audiovisual sector more competitive	Number of requested records	% requested records
Agree	104	(40.2%)
Strongly agree	72	(27.8%)
No opinion	42	(16.2%)
Disagree	35	(13.5%)
Strongly disagree	6	(2.3%)

3.1.5. Co-Production

Concerning a possible co-production fund, most respondents shared the same view on its potential to contribute to the different objectives. Nearly two thirds (63.3 %) of the stakeholders strongly agreed that co-production improves networking and exchange of good practices between professionals; another 29.3 % agreed on that point. The figures are similar regarding the four remaining objectives (increase of cultural diversity, access to foreign market, conclusion of co-production agreements, competitiveness) and show a notable consensus on the high potential of a co-production fund.

However, in the comments section several respondents expressed their concern about a possible future co-production fund. In order to make an impact, a relatively high budget must be provided. Some governmental organisations argued that a co-production fund would not comply with the principle of subsidiarity and also would not be in line with the principles of MEDIA 2007 and its predecessors (see also 3.4.).

Table 7: Co-Production

Improves networking and the exchange of good practices between professionals	Number of requested records	% requested records
Strongly agree	164	(63.3%)
Agree	76	(29.3%)
Disagree	10	(3.9%)
No opinion	7	(2.7%)
Strongly disagree	2	(0.8%)
Contributes to greater cultural diversity	Number of requested records	% requested records
Strongly agree	143	(55.2%)
Agree	90	(34.7%)
No opinion	13	(5%)
Disagree	11	(4.2%)
Strongly disagree	2	(0.8%)
Improves access to foreign market	Number of requested records	% requested records
Strongly agree	158	(61%)
Agree	80	(30.9%)
No opinion	12	(4.6%)
Disagree	7	(2.7%)
Strongly disagree	2	(0.8%)
Facilitates and increases coproductions between the third countries and the EU Member States	Number of requested records	% requested records

Strongly agree	179	(69.1%)
Agree	65	(25.1%)
No opinion	8	(3.1%)
Disagree	5	(1.9%)
Strongly disagree	2	(0.8%)
Makes the audiovisual sector more competitive	Number of requested records	% requested records
Strongly agree	124	(47.9%)
Agree	83	(32%)
No opinion	29	(11.2%)
Disagree	18	(6.9%)
Strongly disagree	5	(1.9%)

3.1.6. Support for development of cinema networks

The last question group referred to a possible action line on development, and more precisely on *"the support of cinema networks (established in Europe but comprising cinemas from the respective third countries as well) which devote a significant share of their programming to European films in third countries and which commit themselves to programming a similar proportion of films from third countries"*.

As with the other categories, the majority of respondents assessed a positive impact of that action line on the policy objectives of the programme. Remarkably, with respect to the influence on cultural diversity, 55.2 % of the respondents strongly agreed and 34.7 % agreed that such a measure would contribute to greater cultural diversity in the audiovisual field.

Table 8: Support for development of cinema networks

Improves networking and the exchange of good practices between professionals	Number of requested records	% requested records
Agree	110	(42.5%)
Strongly agree	99	(38.2%)
No opinion	28	(10.8%)
Disagree	21	(8.1%)
Strongly disagree	1	(0.4%)
Contributes to greater cultural diversity	Number of requested records	% requested records
Strongly agree	143	(55.2%)
Agree	90	(34.7%)
No opinion	15	(5.8%)
Disagree	10	(3.9%)
Strongly disagree	1	(0.4%)
Improves access to foreign market	Number of requested records	% requested records
Strongly agree	120	(46.3%)
Agree	101	(39%)
No opinion	24	(9.3%)
Disagree	13	(5%)
Strongly disagree	1	(0.4%)
Facilitates and increases co-productions between third countries and EU Member States	Number of requested records	% requested records

Strongly agree	86	(33.2%)
Agree	83	(32%)
Disagree	44	(17%)
No opinion	44	(17%)
Strongly disagree	2	(0.8%)
Makes the audiovisual sector more competitive	Number of requested records	% requested records
Agree	99	(38.2%)
Strongly agree	82	(31.7%)
No opinion	43	(16.6%)
Disagree	31	(12%)
Strongly disagree	4	(1.5%)

3.2. Ranking of the possible action lines

In the next part of the questionnaire, stakeholders were asked to indicate which of the above-mentioned possible action lines would have the strongest potential to strengthen cultural diversity and the competitiveness of the audiovisual sector and to rank the three main action lines by decreasing order of importance. Reflecting the results above, a relative majority of all respondents (98 votes, 38.1 % of the first-position votes and 13.1 % of all votes) considered an action line on production as the most efficient tool to achieve the main objectives of a possible future programme. Also the following rankings are remarkable in light of the weighting of priorities. Second in the ranking for the first position was training (62 votes, 24.1 % of the first-position votes and 8.3% of all votes) followed by distribution (51 votes, 19.8 % of the first-position votes and 6.8 % of all votes). However, distribution received the highest ranking as regards the second most important action line. It achieved 78 votes for the second position (31.0 % of the second-position votes) Only 21 votes for the first position were given to an action line on promotion and even less to support for cinema networks (16 votes, 6.2 % of the first-position votes and 2.1 % of all votes) and dubbing and subtitling (9 votes, 3.5 % of the first-position votes and 1.2 % of all votes). Out of all the 98 respondents who voted for production as the most important action line, almost half of them (43 persons) put distribution at second position.

In brief, it can be concluded that the respondents ranked the potential of the different actions to contribute to cultural diversity and competitiveness as follows: 1. action line on production, 2. action line on distribution and 3. action line on promotion.

Table 3: Ranking of the three main action lines (it was possible to choose less than three)

Action Line	Number of votes for Position 1	Number of votes for Position 2	Number of votes for Position 3	Total number of votes
Training	62	30	36	128 (17.1 %)
Distribution	51	78	51	180 (24.0 %)
Promotion	21	38	60	119 (15.9 %)
Dubbing and Subtitling	9	24	22	60 (7.3 %)
Production	98	54	32	184 (24.6 %)
Cinema networks	16	27	40	83 (11.1 %)

3.3. Additional action lines

The questionnaire offered the opportunity to indicate additional action lines from the point of view of the stakeholders. Although this question was not compulsory, 81 out of 259 of the stakeholders made use of this possibility and provided several new ideas or specified the already proposed action lines. Some respondents also suggested new action lines in the "comments" section of the questionnaire. These proposals will also be taken into account in this part of the evaluation report. The action lines are ranked in the order of the frequency of their reference.

- Development

Several stakeholders encouraged the Commission to consider an additional action line on **development of cinema projects** as well as on training measures that are linked with the development of a concrete project. More precisely, they suggested that an action line on development should focus on support for scriptwriting, the development of a financing plan and the search for suitable partners to accomplish a production. One respondent proposed an online database for international projects in development in order to give professionals around the world the information about ongoing projects that might be interesting for cooperation.

- Festivals

The respondents also underlined the importance of support for international and specialised bilateral **film festivals**, including film markets, and to give European professionals the possibility to attend these festivals in third countries and vice versa. Film festivals are considered to be the first point of contact where distributors, sales agents or other professionals can discover new films from third countries and therefore have a great impact on the circulation of films from third countries in Europe. Besides, film festivals could strengthen the development of networks and increase the exchange of good practices between the professionals, in particular when they are not able to benefit from the networks of film schools and training courses, because they do not attend these institutions.

In this context, respondents often referred to the need for supporting **symposiums, seminars and other joint conferences** of European and third countries' professionals on different topics (e.g. business opportunities in international markets, possibilities of financing). From the point of view of several stakeholders, such events can bring together film-makers and financiers and improve their cooperation. Associations of professionals in the audiovisual sector were considered to be a good starting point for the organisation of these joint seminars.

A number of stakeholders stated that, apart from festivals and seminars, it is important to establish a steady contact point for information in third countries. Therefore it was suggested to build up "**cinematographic agencies**" in key countries, for instance India. These agencies could provide the information on market structure, financing and co-production possibilities to professionals in Europe and in third countries. One respondent mentioned the example of the French **network of audiovisual attachés** based in each embassy's cultural service. These contact points work together hand in hand with French broadcasters, funding and promotion agencies and other institutions that help local media companies to apply for various support schemes in France.

- Training

Regarding training programmes, several stakeholders suggested **to include copyright issues, the use of digital technologies and all aspects of private financing in the schedule of funded training courses.**

- Co - production

With regard to a possible action line on production, some stakeholders suggested focusing on **co-production in the area of animation, short films and documentary** and on **independent productions** in third countries. From their perspective, a possible co-production fund should also include producers that only produce DVD or for distribution through VoD.

- Distribution

In the context of distribution measures, stakeholders proposed to include sales agents as beneficiaries of a funding scheme because they play an increasing role within film financing by providing minimum guarantees for producers. The creation of (formal) networks of distributors and sales agents was considered to be difficult because they tend to organise their actions rather film by film and are not in a position to undertake commitments to further projects. In order to improve the distribution of European and third countries' films, it was suggested that both distributors and producers should have access to funding for measures such as the cost for prints and marketing expenses. Distributors are often reluctant to invest, for example, in dubbing and subtitling of films with uncertain potential. Hence, these costs are borne by the producers if they plan to distribute their film outside national borders.

- Others

Aside from the above-described proposals, the following action lines were suggested: support for the use of digital technologies and online distribution; support for research into the audiovisual market in third countries and harmonisation of technical terms in the audiovisual sector; establishment of a network of casting agents to foster the exchange of actors in Europe and third countries; support for media literacy measures; support for the preservation of films and film archives.

3.4. Comments

The last section of the questionnaire invited respondents to give general comments. 96 of the stakeholders made use of the opportunity. Most of them welcomed the initiative and agreed on the general design of the action lines as well as on the format of the public consultation. Some stakeholders, however, criticised the questionnaire for not being specific enough on the future action lines. Most of the comments that referred to the objectives and the proposed content of the programme are closely linked to the indicated additional action lines and can be categorised as follows: training, festivals, co-production, digital technologies.

- Training

A number of the comments concerning training stressed the significance of such an action line. In order to foster exchange between professionals, grants should not only be given to students but also to young professionals and those who are already well established but need to update their knowledge and their network. Support should also be available for the exchange of professors and for the training of professors. Some existing training programmes that already receive support from the MEDIA 2007 programme (e.g. EAVE, ACE) could serve as a good example. Alternatively, an opening of these programmes for third countries could be considered. One representative of an association of film-makers pointed out that international training programmes bear the risk of encouraging the "emigration of talent" instead of strengthening the establishment of a national film sector.

- Festivals and conferences

As already mentioned above, a considerable number of respondents referred to the importance of support for international film festivals. They were described as "basic research and laboratories" and a meeting point for professionals and their creative ideas.

- Co-Production

The suggestion of the establishment of a co-production fund received controversial comments especially from the governmental side (see also 3.1.5.) As reflected in the question section, several respondents underlined that a co-production fund, on the one hand, is a very successful tool to initiate international cooperation and to increase the number of international co-productions. On the other hand, a co-production fund, regardless of the possible future budget, was considered to be in any case too small to have a

positive effect on the competitiveness of the European sector or to contribute in any way to increasing cultural diversity. Especially public authorities of the Member States expressed their doubts about the consistency of a co-production fund with the principle of subsidiarity.

- Digital technology

A remarkable number of comments referred to the use of digital technology. Digitisation is seen as a mayor challenge in the audiovisual sector and therefore should be incorporated in any action line of a possible new programme. In particular, an action line on digital distribution could complement projects being supported under the MEDIA 2007 programme. Such an action line should always be linked to market analysis regarding the market structure and the way in which people access audiovisual content. It was mentioned that digitisation has the potential to balance the financial and structural deficits in some third countries' audiovisual markets.

A single respondent pointed out that support for the use of digital technologies would also be of great value for the preservation of the film heritage, especially in third countries where the storage of films is particularly difficult.

- Other comments

Regarding the general design of the initiative, one stakeholder considered action lines that are applied "bottom up" and that address practical areas such as dubbing and subtitling to be more efficient than more general and abstract action lines. Public authorities that welcomed the possible new programme and the magnitude of potential benefits also indicated the scale of challenges to which it needs to respond. One major challenge would be to keep the balance between the two objectives: increase competitiveness and increase cultural diversity. In order to realise the potential benefits they stressed the importance of a clear evidence base and the evaluation of any future programme in accordance with clear indicators. Furthermore, there should be consistency with the budget and with other funding programmes such as MEDIA 2007. Moreover, public authorities commented on the issue of a geographical target for a possible new programme. Some would like to see European Neighbourhood Countries covered in order to achieve synergy effects with other programmes. Others indicated that it is essential to develop a differential approach for different countries and markets.

CONCLUSIONS

The main results of the public consultation on the possible future cooperation programme "MEDIA MUNDUS" can be summarised as follows.

- There is strong support for the new initiative to address the increasing internationalisation of the audiovisual sector and to boost the competitiveness and cultural diversity through cooperation and exchange between professionals in Europe and third countries.
- The respondents (strongly) agreed that all proposed action lines will contribute to achieve the principal objectives, i.e. improving networking of professionals, contributing to greater cultural diversity, improving access to foreign markets, facilitating and increasing co-productions and increasing competitiveness of the audiovisual sector.
- In the ranking of possible action lines, co-production achieved the strongest support from the professionals. However, some stakeholders, in particular public authorities, expressed their concern that the money invested could easily evaporate and have only little effect. Action lines on distribution, training and promotion were also considered to be of major importance. An action line on dubbing and subtitling received only few high rankings.
- The stakeholders indicated several additional action lines from their point of view. Most important were action lines on development of film projects, support for festivals and other international and bilateral conferences, establishment of contact and information points in third countries, support for the use of digital technology, support for media literacy measures and support for further research into third countries' audiovisual markets.