



Interim evaluation of the Creative Europe Programme and ex-post evaluation of the Culture, MEDIA 2007 and MEDIA Mundus programmes

Final Report

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Creative Europe Programme
and ex-post evaluation of the
Culture, MEDIA 2007 and
MEDIA Mundus programmes**

Final Report

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The core evaluation

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Executive summary

Introduction

This report sets out the key findings from the interim evaluation of the Creative Europe Programme and the ex-post evaluation of the three predecessor programmes: Culture, MEDIA 2007, and MEDIA Mundus. These evaluations were commissioned by the Directorate General for Education and Culture of the European Commission (DG EAC) in 2016 and delivered between May 2016 and August 2017. The evaluation of Creative Europe and predecessor programmes aimed to:

- assess the relevance, coherence, effectiveness, efficiency, sustainability, and EU added value (hereafter the evaluation criteria) of Creative Europe and predecessor programmes;
- assess the contribution of Creative Europe to smart, sustainable and inclusive growth in the new Commission priorities and sector strategies; and
- assess the long-term results and impact of the predecessor programmes.

The subjects of the evaluation

Creative Europe is the current seven-year programme (2014-2020) supporting the cultural and creative sectors (CCS)¹. Creative Europe has two general objectives: safeguarding cultural and linguistic diversity and strengthening the competitiveness of these sectors; and four specific objectives: supporting the capacity of European CCS to operate transnationally and internationally, promoting circulation of cultural and creative works and professionals, strengthening financial capacity of sector's SMEs, and fostering innovation and audience development through policy cooperation².

The Creative Europe Programme brings together the predecessor programmes (Culture, MEDIA, and MEDIA Mundus) which were implemented under the 2007-2013 multiannual financial framework, and both simplifies and expands on these previous programmes.

The Programme is composed of three strands: the MEDIA Sub-programme (replacing the previous MEDIA and MEDIA Mundus programmes), the Culture Sub-programme, and the Cross-sectoral Strand (which covers transversal aspects of the Programme). Creative Europe's scope is broader than that of the predecessor programmes, with a greater range of both sectors and operators eligible to participate. The changes from the predecessor programmes reflect both the evolution of the CCS and the changing policy priorities of the European Commission. Greater emphasis is now put on the economic contributions of the CCS, resulting in a stronger emphasis in the programme on:

- Economic development and job creation;
- Competitiveness of the CCS;
- New management and business models;
- Audience development as a streamlined priority; and
- Digital solutions, notably for circulation of works.

The method of approach to the evaluation

The evaluation used an analytical framework to assess the performance of Creative Europe and the predecessor programmes against each of the evaluation criteria. The

¹ Its mandate is based on the TFEU Article 166 on training policy, Article 167 on culture and Article 173 on industrial policy.

² Articles 3 and 4 of the Regulation 1295/2013 establishing the Creative Europe Programme.

analytical framework was made up of 78 evaluation questions with associated judgment criteria, indicators and means of verification.

The method of approach for the evaluation combined a variety of data collection and assessment methods including programme data analysis, desk research, stakeholder consultations, interviews, surveys with programme beneficiaries and an open public consultation (OPC). The approach included six focused evaluations (FEs) covering 10 of the Programme's key schemes.

In addition, two notes set out further detailed analysis. First, a review of the MEDIA level playing field (LPF) provisions and their impact. Second, a critical review of the existing monitoring and evaluation indicators³ and setting out a proposed operational Programme Monitoring Framework (PMF) for the Creative Europe Programme.

The strengths and limitations of this approach are detailed in Section 2.4.

Evaluation findings

The findings of the evaluation are organised according to the six evaluation criteria.

Relevance of the programmes

Creative Europe addresses the CCS's main challenges. Access to public and private funding is the major challenge for the CCS, especially because of increased competition brought about by globalisation and the digital shift.

The Cultural and Creative Sector Guarantee Facility (CCS GF) is seen by financial intermediaries as an opportunity to enter the sector and/or to develop existing lines of business at a lower risk. This will ultimately lead to better access to finance for CCS entities and the development of their capacity, thus potentially generating growth and employment.

Creative Europe responds to both the ongoing and emerging needs of the audiovisual and culture sectors. The context for the CCS has changed dramatically in the last decade, with radically different patterns of consumption and increased competition because of globalisation. The main needs of continued relevance to the European CCS are capacity building, professionalisation, audience development and access to finance.

Overall, *emerging* needs have been captured and partially addressed by Creative Europe, building on lessons learned from the 2007-2013 MEDIA and Culture Programmes. These emerging needs mainly relate to the continued impact of digital technologies.

Creative Europe is also relevant to the changing priorities of the sectors, to the strategies pursued by the Member States and to EU policy priorities.

Internal coherence of the programmes

Creative Europe provides a set of actions to support the audiovisual and cultural sectors and is internally coherent across the MEDIA and the Culture Sub-programmes. The MEDIA Sub-programme delivers coherent coverage of the different stages of the value chain, and the Culture Sub-programme provides a largely coherent response to the wide range of needs across the cultural sector.

In line with the Creative Europe Regulation⁴, the Programme takes into account the specific nature of the different sectors through tailor-made approaches within two independent sub-programmes and the Cross-sectoral Strand. The Cross-sectoral Strand was designed to improve the internal coherence of Creative Europe and to provide a

³ Article 18 of the Regulation 1295/2013 establishing the Creative Europe Programme.

⁴ Whereas, paragraph 19 of the Regulation 1295/2013 establishing the Creative Europe Programme.

coherent response to pan-sectoral needs. However, the internal coherence of the Programme could be further improved by focusing more on cross-sectoral activities.

External coherence of the programmes

Creative Europe's overall objectives and priorities are consistent and complementary with those of national policies and programmes, thus respecting the principle of subsidiarity. The transnational nature of Creative Europe provides a distinctive offer that is rarely matched by national funding, which tends to focus on domestic activities. This transnational focus is highly valued by stakeholders and beneficiaries as a unique element of Creative Europe.

Creative Europe is largely consistent with other EU priorities, funding, and support mechanisms relevant to the audiovisual and cultural sectors, including both sector-specific opportunities and general financing, business, and economic support for SMEs. The MEDIA Sub-programme is complementary to other EU funding through its support for audiovisual projects and activities, which contrasts with other generic business and economic support. Culture Sub-programme support is increasingly integrated with other EU funding opportunities; for example cultural projects and activities are eligible for other forms of EU funding without a specific 'cultural' focus.

Creative Europe sits alongside a range of overlapping policies and programmes at the international level but avoids duplication because of the overall shortage of funding.

Effectiveness of the programmes

The predecessor programmes made a significant contribution to the priorities of the Lisbon strategy that aimed to make the EU 'the most competitive and dynamic knowledge-based economy in the world'. The predecessor programmes contributed €1.15 billion in funding to around 7,300 businesses and organisations in the CCS, resulting in the creation of an estimated 8,000 jobs⁵. However, the predecessor programmes could have done more to contribute to the strategic objectives of 'putting the citizen first' and tapping into 'new' technologies.

Similarly, ***the Creative Europe Programme delivers on strategic EU priorities***. The Programme is making an important contribution towards the EU2020 employment target and the priorities of the current Commission: stimulating investment for the purpose of job creation; and a deeper and fairer internal market with a strengthened industrial base. Between 2014 and 2016, Creative Europe contributed €544 million in funding to around 2,600 businesses and organisations in the CCS, resulting in the creation of an estimated 3,000 jobs.

Both Creative Europe and the predecessor programmes contributed to EU sectoral strategies. Under Creative Europe, the MEDIA Sub-programme is increasingly contributing to the Digital Single Market Strategy (DSMS)⁶ as actions with a digital focus are expanding in both scope and scale. The MEDIA training, distribution, and development schemes contributed to developing capacity in the audiovisual sector for both the use of digital technologies and distribution of audiovisual works across Europe and beyond.

Moreover, the MEDIA Sub-programme has helped the European audiovisual industry to adapt to the *acquis communautaire*. It provides for measures accompanying the

⁵ This amounted to €769 million in financial support for Media, €364 million for Culture and €14 million to MEDIA Mundus. 2800 entities in the audiovisual sector benefited from the support and 4,500 in the cultural sector.

⁶ The strategy has three pillars: (i) 'improving access to digital goods and service across the EU'; (ii) 'creating an environment where digital networks and services can prosper'; and (iii) 'supporting the use of digital as a driver for growth'.

copyright reforms, for example through support to catalogues of European films, support to licensing hubs, support to a more efficient use of subtitling and an Animation Action Plan. Also, the new scheme "Promotion of European Works Online" supports the industry's adaptation to the proposed provisions of the future AVMS Directive on a quota of European works for VOD services and obligation to make such works prominent.

The Culture Sub-programme also contributes to the objectives of the DSMS. This contribution includes the creation of new online goods and attracting online audiences as well as enabling the use of digital technology to promote cultural works; increasing the level of digital activity of cultural networks and organisations; and supporting relevant capacity building and the use of digital promotion approaches. However, there is an opportunity to better recognise the contributions of both sub-programmes to the DSMS.

The MEDIA and Culture Sub-programme's greatest contribution to the European Agenda for Culture is to the first two of the Agenda's three key objectives, namely (i) cultural diversity and intercultural dialogue; and (ii) culture as catalyst for creativity⁷. However, the contribution of the MEDIA programmes to the European Agenda for Culture could have been greater as MEDIA's relevance to the Agenda also requires further recognition.

The predecessor programmes delivered on most of their general and specific objectives. For example, the predecessor MEDIA Programme contributed to:

- a total of 492 million admissions for films distributed with the support of the Programme;
- the development of over 3,000 European audiovisual titles that led to the production of 1,460 audiovisual works, around 850 of which made it to market; and
- improving the skills of around 8,800 audiovisual professionals, contributing to their innovation and competitiveness.

The predecessor MEDIA Programme could have been more effective in anticipating market developments, including the digital shift, and in addressing market imbalances.

The predecessor Culture Programme contributed to:

- reaching an estimated 8.8 million people through Cooperation projects alone;
- increasing the transnational circulation of artists and other professionals by supporting mobility experiences of around 214,500 cultural players;
- increasing the transnational circulation of European cultural and creative works by, for example, contributing to 3,200 literary translations and at least 2.9 million books sold;
- building the capacity and networks of cultural operators for transnational work through support for around 261,000 cultural players and 4,550 cultural operators.

The predecessor Culture Programme was moderately successful in preserving and promoting cultural and linguistic diversity, enhancing innovation and creativity in European CCS, promoting intercultural dialogue and understanding, audience development and enhancing competitiveness of supported operators. The predecessor Culture Programme could have been more effective in strengthening the financial standing of cultural operators and promoting their work with underrepresented groups.

The MEDIA Mundus was effective in improving European and third countries professionals' knowledge of audiovisual markets, but less so in facilitating access to films from third countries to European markets.

Creative Europe is delivering on most of its general and specific objectives, effectively balancing the general objectives of diversity and competitiveness.

⁷ The final objective is (iii) culture in the EU's international relations.

Overall, it has been effective in preserving and promoting cultural and linguistic diversity and strengthening the competitiveness of the European CCS.

The positive discrimination provisions (i.e. 'level playing field' provisions) of the Creative Europe MEDIA Sub-programme are more effective in balancing the diversity and competitiveness considerations than those of the predecessor Programme. The positive discrimination provisions under Creative Europe have mostly favoured medium production capacity countries (PCC) to the detriment of high PCC. The low PCC have also benefited from these provisions, but to a lesser extent. This variation is because of the significantly weaker capacity of low PCC, when compared to medium PCC, in accessing MEDIA Sub-programme support. A revised set of "level playing field" measures was adopted in 2017 in agreement with the Programme Committee in order to avoid unintended consequences⁸.

Under Creative Europe, MEDIA support has helped companies experience moderate growth by scaling up their operations' size, portfolios, and partnerships. The MEDIA programmes have made a greater contribution in shaping new and reinforcing existing transnational partnerships.

Under Creative Europe, the Culture Sub-programme has been balanced in its support for different cultural sub-sectors. The prioritisation of economic objectives over artistic and social considerations has raised concerns. Compared to the predecessor Programme, the average size of supported projects more than doubled. However, the orientation of the programme focused on competitiveness and thus the number of operators was reduced by one-third. Nevertheless, the Sub-programme supported a range of different cultural sectors, irrespective of whether they had a marked industrial dimension. Finally, activities supported by the Culture programmes contribute to the creation of a 'European cultural space' and through it to their general objective of promoting diversity. For instance, most of the Culture programmes' schemes include a specific focus on audience development, aiming to bring European cultural works to non-national and new audiences.

The specific objective of providing access to finance for SMEs in the CCS will likely be facilitated by the CCS GF. The CCS GF started to operate two years after the start of the Creative Europe programme as the budget was only available from 2016. It is likely that this postponement has had a negative impact on the access to finance of SMEs in the audiovisual and cultural sectors in Europe and hence on the achievement of this specific objective. However, since 2016 the implementation of the CCS GF has been very effective as indicated by the full allocation of the guarantees to financial intermediaries, exhausting the funds available to support CCS GF in 2016 and 2017.

The MEDIA and Culture predecessor programmes were effective in delivering their key outputs, results and impacts. The impact of MEDIA Mundus was less so.

Creative Europe's Sub-programmes are on course to deliver their intended outputs, outcomes and impacts. Some aspects of the operational effectiveness of the schemes (e.g. reaching wider audiences, ensuring geographical coverage, and/or further increasing the impact on the employment) could be improved. The Cross-sectoral Strand of Creative Europe delivered some of its outputs, results, and impacts but delays in the implementation of the CCS GF and under-spend on transnational policy cooperation measures means that the effectiveness of implementation can be improved. The latter could be enhanced by implementing the Performance Monitoring Framework for the current Programme (developed as part of this evaluation).

Efficiency of the programmes

⁸ An updated LPF note is expected which will reflect the compromise proposed in the WP 2018.

The size and range of the audiovisual and cultural sectors at European level and the geographical areas covered by the Programmes is significant. The budget of Creative Europe and its predecessor programmes were therefore not enough to create a major impact of a European scale and/or at sectoral level. This is especially the case for the predecessor Culture Programme and its successor Sub-programme which must service a greater range of sub-sectors. For instance, the size of the CCS sector in Europe represented approximately €560 billion (or 4.5 percent) of the EU GDP in 2014 and employed 8.5 million workers (3.8 percent of the total European workforce). In comparison, €1.1 billion were channelled to the CCS sector by the three predecessor programmes over the period 2007 to 2013. The reduced number of schemes under the current Programme compared to the predecessor programmes is an indication of improved focus. Similarly, the financial support allocated to the predecessor Desks and Creative Europe Desks (CEDs) was considered crucial and should be maintained at current levels although the evaluation did find opportunities to increase efficiency.

The cost effectiveness of the programmes was satisfactory and improved from one programming period to another. The efficiency of most of the schemes reviewed has improved and or remained stable, with a few exceptions. An increase in the cost per project usually resulted in greater outputs and/or more significant outcomes or impacts.

Shortcomings mainly relate to the governance and management of the Programme implementation. Bringing together the Culture and Media programmes under a comprehensive framework did not fully deliver its intended benefits. For instance, efficiencies in the management costs of the Programme did not fully materialise as the number of staff full-time equivalents dedicated to the Creative Europe Programme slightly increased compared to the predecessor programmes, together with similar increases in the yearly operational and administrative costs.

Sustainability of the programmes

The sustainability of the results lies primarily in the continuation of partnerships that were started under Creative Europe and the predecessor programmes. Under both MEDIA and Culture, collaboration between project partners is continued in some form beyond the projects' lifecycle. Under MEDIA, sustainability is also found in the intention and capability of organisations to continue European co-production, i.e. a sustained interest in (co)producing or distributing works with a European dimension. When compared to Culture, MEDIA projects did not as frequently lead to continued collaboration between partners or to other forms of follow-up. This difference can in part be explained by the specific nature of some MEDIA schemes focussing less on developing cooperation between project partners, and more on the delivery of a specific project.

The sustainability of the impacts also comes through the exchange of learning during the implementation of projects and the dissemination of the results. These exchanges result in the development of new skills and competencies, use of supported projects' results across the sector, and consequently lead to the professionalization of the sector as well as higher capacity of its operators to work internationally and transnationally. This was the case across programmes but especially for the Culture Sub-programme and predecessor programme.

EU added value of the programmes

The main EU added value comes from the strong international dimension of the programmes. Only a few other international funds support transnational cooperation and those that do are of significantly smaller scale. Most *supported* activities would have been significantly reduced in scope and size or would not have happened without the funding provided by Creative Europe and the predecessor programmes. The significance of the funding in the supported activities differs widely by programme and by scheme:

- For MEDIA, most supported activities are typically part of a wider value chain from developing to distributing content. The funding therefore contributes to one or a few specific steps in the value chain. These activities would have been implemented in some form anyway, but to a more limited extent in terms of geographic coverage, quality of the audiovisual works supported or size of audiences reached. MEDIA support is also unique in promoting (co)productions that have a potential to appeal to cross-border audiences.
- For Culture, the activities funded are less closely embedded in existing processes, although they can generally be closely aligned with the general objectives and activities of the organisation. For example, a Cooperation Project produced a new model for skills development in orchestras based on transnational learning that, while building on the existing activities of participating organisations, was a standalone initiative. This type of activity is very unlikely to have taken place without the EU funding.

Elements of EU added value of the programmes are:

- The creation of international networks and cross-border partnerships, which constitute the main and the most durable structuring elements⁹ of Creative Europe;
- Transnational networks also increase the capability of CCS operators overall¹⁰ and especially for those working in niche fields and in Member States where such capabilities are less developed;
- The support of organisations in taking (calculated) risks, which allows them to focus on operating with a European dimension;
- The reputational effect for programmes' beneficiaries that increases the potential interest of partners and financial intermediaries and their trust in supported projects. This reputational aspect was also reported to facilitate access to additional funding.

Recommendations

The headline recommendations generated by the evaluation are organised according to the main evaluation criteria and address the main opportunities and challenges for the Programme, as presented in the previous section. Section 4 of the report provides additional context and details for these recommendations.

Relevance of the programmes

- Prioritise the development of transmedia projects to ensure continued relevance of the audiovisual offer in light of changing consumption patterns;
- Adjust level playing field provisions to make them more relevant to audiovisual market dynamics;
- Extend the scope of support for the European video games industry;
- Ensure that the Culture sub-programme is relevant to the development needs of cultural operators;
- Provide more flexible support to cultural operators to respond to change;
- Ensure that the Literary Translation scheme supports linguistic diversity; and,
- Make better use of the Cross-sectoral Strand.

Coherence of the Programmes

⁹ Note that there is some evidence of structuring effects over time, although the fragmented sector makes this hard to achieve.

¹⁰ The creation of long-lasting international partnerships and collaborations were successful in securing repeat funding which in turn has helped the companies in these partnerships to grow and scale up their operations.

- Maximise the mutual information about policy agendas;
- Develop a more coherent response across the MEDIA Sub-programme to changing technologies and business models in the audiovisual sector;
- Ensure there is sufficient awareness of and clarity around complementary opportunities within the sub-programmes and other EU funding sources; and,
- Ensure coherence with international and national funding sources.

Effectiveness of the programmes

- Enhance the design of the current Creative Europe Programme;
- Increase the mainstreaming of the sectors' strategies across the whole of the Creative Europe Programme;
- Strengthening the focus on audiences;
- Consider ways to improve the impact of the Cross-sectoral Strand;
- Concerning MEDIA, further reduce the imbalances in the nationality of the beneficiaries of programme funding through positive discrimination; and,
- Implement the Programme monitoring activities and related reporting and fine-tune the framework according to changing markets and policy priorities.

Efficiency of the programmes

- Target budgetary allocations on the most efficient schemes;
- Improve application procedures and the Creative Europe Desks (CEDs) function.

Sustainability of the programmes

- Consider strengthening mechanisms to disseminate the results of funded projects so as to improve the sustainability of their impacts;
- Review how to enhance the exploitation of supported outputs.

EU Added Value of the programmes

- Capitalise on the partnerships and networks developed through supported projects, and which are core to EU added value

Abstract

The interim evaluation of the Creative Europe Programme and the ex-post evaluation of the three predecessor programmes: Culture, MEDIA 2007 and MEDIA Mundus assesses their relevance, coherence, effectiveness, efficiency, sustainability and EU added value, as well as the long term results and impact of predecessor programmes. It considers the context of the implementation of the programmes also reflecting on their contribution to smart, sustainable and inclusive growth, on the new Commission priorities, including the Digital Single Market Strategy and the European Agenda for Culture. In sum, the programmes have been relevant to the current emerging needs of the Creative and Cultural Sectors linked to the globalisation and digitalisation; are mostly internally coherent; are externally coherent with the Member States' policies, EU and other international interventions; are effective and efficient in generating their expected results; somewhat generate somewhat sustainable impacts and bring significant EU added value mostly by supporting transnational cooperation in the sector. The recommendations are to enhance the design of the current and future programme, flexadapt it to upcoming challenges, communicate on other sources of funding available, target the budgetary allocation on the most efficient schemes, strengthen the dissemination of project results and capitalise on the partnerships and networks developed through the supported projects.

Summary statement

- Creative Europe design suffers from unclear definition and hierarchy of its objectives, of the desired impact of the level playing field provisions and holistic links to EU strategies. On this basis it is recommended to reduce the number of objectives, establish clear objectives relevant for the whole of the CCS and EU strategies as well as provide a definition of the level playing field and EU added value of the Programme.
- The measurement of the Programme's performance and monitoring practices at Programme level are currently very limited. It is recommended to implement the Programme monitoring activities and related reporting mechanisms as soon as possible, and fine-tune the framework developed according to changing markets and policy priorities.
- The bringing together of the Culture and MEDIA programmes within a comprehensive framework did not fully result in increased efficiencies in Programme management. It is recommended to mainstream Programme management practices and increase the frequency of the governance related activities for the steering of the Programme.
- The Programme is not responsive enough to new and emerging needs of the CCS. Therefore it is recommended to identify early and support areas where the Programme could continue retaining its EU added value.
- The Creative Europe Programme could be more effective in relation to audience development priorities of both sub-programmes. It is recommended to rebalance Creative Europe sub-programmes' schemes performance in terms of financial support for creative and cultural sub-sectors (supply side) and support stimulating demand for European non-national cultural and creative works (demand side).
- Programme beneficiaries lack access to funding and awareness of other EU funding streams for their sector. It is recommended to (1) rely on the communication activities of the Programme to raise awareness of other funding available from other EU funded programmes (2) align the Programme funding with other EU interventions (3) continue to implement the CCS GF.
- Cross-sector synergies within the activities of the Programme are not exploited systematically. Consequently it is recommended to increase inter-services dialogue, strategic and operational planning between the DGs responsible for the Programme and reinforcing the links between the activities supported by the Programme and all its specific objectives. In addition, increasing the volume of activities under the Cross-sectoral Strand's transnational policy cooperation strand could also contribute to raising awareness of the Programme results, potential synergies and cooperation opportunities provided by Creative Europe.
- The level of financial support may be inadequate to some small operators in the sector and across Member States' territories. It is recommended to target budgetary allocations on the most efficient schemes and on schemes with the highest EU added value i.e. promoting the scaling up of operators, capitalising on the advantages of international co-production and learning, with an emphasis for some schemes on cultural diversity and others on promoting competitiveness of the CCS.
- The main added value of Creative Europe and its predecessors comes from the strong international dimension of the programmes, with few other equivalent in

Europe. It is therefore recommended to capitalise on the partnerships and networks developed through supported projects.

Document de synthèse

1 Introduction

Ce rapport présente les principales conclusions de l'évaluation intermédiaire du programme Europe créative et de l'évaluation ex post des trois programmes précédents: Culture, MEDIA 2007 et MEDIA Mundus. Ces évaluations ont été commandées par la direction générale de l'éducation et de la culture de la Commission européenne (DG EAC) en 2016, et livrées entre mai 2016 et août 2017. L'évaluation d'Europe créative et des programmes précédents visait à:

- évaluer la pertinence, la cohérence, l'efficacité, l'efficience, la durabilité et la valeur ajoutée européenne (ci-après les critères d'évaluation) d'Europe créative et des programmes précédents;
- évaluer la contribution d'Europe créative à une croissance intelligente, durable et inclusive ainsi qu'aux nouvelles priorités et aux stratégies sectorielles de la Commission; et
- évaluer les résultats et l'impact à long terme des programmes précédents.

2 Les sujets d'évaluation

Europe créative est le programme de sept ans en vigueur (2014-2020) en faveur des secteurs de la culture et de la création (SCC)¹¹. Europe créative a deux objectifs généraux: sauvegarder la diversité culturelle et linguistique et renforcer la compétitivité de ces secteurs, et quatre objectifs spécifiques: soutenir la capacité des SCC européens à opérer à l'échelle transnationale et internationale, favoriser la circulation des œuvres culturelles et créatives et la mobilité des professionnels concernés, renforcer la capacité financière des PME du secteur et favoriser l'innovation et l'élargissement du public visé grâce à l'appui de la coopération politique¹².

Le programme Europe créative regroupe les programmes précédents (Culture, MEDIA et MEDIA Mundus) mis en œuvre sous l'égide du cadre financier pluriannuel 2007-2013, offrant une version à la fois simplifiée et élargie de ces programmes.

Le programme est composé de trois volets: le sous-programme MEDIA (qui remplace les programmes précédents MEDIA et MEDIA Mundus), le sous-programme Culture et le volet intersectoriel (qui couvre les aspects transversaux du programme). Europe créative a une portée plus large que les programmes précédents, étant ouvert à davantage de secteurs et d'opérateurs. Les changements par rapport aux programmes précédents reflètent à la fois l'évolution des SCC et les changements de priorités de la Commission européenne. On accorde aujourd'hui une plus grande importance aux apports économiques des SCC. Le programme met donc davantage l'accent sur:

- le développement économique et la création d'emplois;
- la compétitivité des SCC;
- les nouveaux modèles de gestion et d'activité;
- l'élargissement du public visé en tant que priorité bien définie; et
- les solutions numériques, notamment pour la circulation des œuvres.

¹¹ Son mandat est fondé sur l'article 166 du TFUE relatif à la politique de formation ainsi que sur l'article 167 portant sur la culture et sur l'article 173 concernant la politique industrielle.

¹² Articles 3 et 4 du règlement n° 1295/2013 établissant le programme Europe créative.

3 L'approche méthodologique utilisée pour l'évaluation

Un cadre analytique a été utilisé pour évaluer les performances d'Europe créative et des programmes précédents au regard de chaque critère d'évaluation. Ce cadre analytique comportait 78 questions d'évaluation assorties de critères de jugement, d'indicateurs et de moyens de vérification.

L'approche méthodologique utilisée pour l'évaluation combine diverses méthodes de collecte et d'évaluation des données, notamment l'analyse des données du programme, la recherche documentaire, les consultations avec les parties prenantes, les entretiens, les sondages auprès des bénéficiaires du programme et une consultation publique ouverte. Elle comprend six évaluations ciblées couvrant 10 actions clés du programme.

En outre, deux notes présentent une analyse détaillée supplémentaire. Premièrement, un examen des dispositions du programme MEDIA relatives aux conditions de concurrence équitables et de l'impact de ces dispositions. Deuxièmement, un examen critique des indicateurs de suivi et d'évaluation existants¹³ et l'établissement d'un cadre opérationnel de suivi du programme pour Europe créative.

Les forces et faiblesses de cette approche sont détaillées à la section 2.4.

4 Résultats de l'évaluation

Les résultats de l'évaluation s'articulent autour de six critères.

Pertinence des programmes

Europe créative répond aux principaux défis des SCC. L'accès aux financements publics et privés constitue une difficulté majeure dans ces secteurs, notamment en raison de la concurrence accrue engendrée par la mondialisation et le passage au numérique.

Le mécanisme de garantie en faveur des secteurs de la culture et de la création est perçu par les intermédiaires financiers comme une occasion d'entrer dans le secteur et/ou de développer des branches d'activité existantes à moindre risque. Au bout du compte, cela facilitera l'accès au financement pour les entités des SCC et leur permettra de renforcer leurs capacités, ce qui pourrait générer croissance et emploi.

Europe créative répond aux besoins actuels et émergents des secteurs de l'audiovisuel et de la culture. Le contexte dans ces secteurs a considérablement changé au cours des dix dernières années, avec l'émergence de schémas de consommation radicalement différents et d'une concurrence accrue en raison de la mondialisation. Les principaux besoins toujours d'actualité dans les SCC européens sont: le renforcement des capacités, la professionnalisation, l'élargissement du public visé et l'accès au financement.

Dans l'ensemble, les besoins *émergents* ont été identifiés et partiellement pris en compte par Europe créative grâce aux enseignements tirés des programmes MEDIA et Culture 2007-2013. Ces besoins émergents sont principalement liés à l'impact continu des technologies numériques.

Europe créative reflète également les changements de priorités des secteurs concernés, les stratégies poursuivies par les États membres et les priorités politiques de l'UE.

Cohérence interne des programmes

Europe créative propose un ensemble d'actions visant à soutenir les secteurs de l'audiovisuel et de la culture et intègre de façon cohérente les sous-programmes MEDIA et Culture. Le sous-programme MEDIA assure une prise en charge cohérente des différentes étapes de la chaîne de valeur, et le sous-programme Culture fournit une réponse adaptée aux multiples besoins du secteur culturel.

¹³ Article 18 du règlement n° 1295/2013 établissant le programme Europe créative.

Conformément au règlement d'Europe créative¹⁴, le programme prend en compte la spécificité des différents secteurs par le biais d'approches sur mesure au sein de deux sous-programmes indépendants et du volet intersectoriel. Le volet intersectoriel a été conçu pour améliorer la cohérence interne d'Europe créative et apporter une réponse cohérente aux besoins des différents secteurs concernés. Toutefois, la cohérence interne du programme pourrait encore être améliorée en mettant davantage l'accent sur les activités intersectorielles.

Cohérence externe des programmes

Les objectifs et priorités d'Europe créative sont globalement cohérents et viennent compléter ceux des politiques et programmes nationaux, respectant ainsi le principe de subsidiarité. En raison de son caractère transnational, Europe créative propose des actions différentes et rarement prises en charge par les financements nationaux, qui ont tendance à se concentrer sur les activités domestiques. Cette approche transnationale inédite adoptée par Europe créative est très appréciée des parties prenantes et des bénéficiaires.

Europe créative s'inscrit tout à fait dans le cadre des autres priorités, financements et mécanismes de soutien de l'UE applicables aux secteurs de l'audiovisuel et de la culture, qu'il s'agisse des opportunités sectorielles ou des mesures générales de soutien financier, commercial et économique à l'attention des PME. Le sous-programme MEDIA vient compléter d'autres financements européens par le biais d'un soutien réservé aux projets et activités audiovisuels, qui diffère des mesures globales de soutien économique et commercial proposées par ailleurs. Le soutien du sous-programme Culture est de plus en plus associé à d'autres possibilités de financements européens, c'est-à-dire que les projets et activités culturels peuvent solliciter d'autres formes de financement de l'UE qui ne sont pas spécifiquement axées sur la «culture».

Europe créative côtoie une série de politiques et de programmes qui se chevauchent au niveau international, mais évite les doubles financements en raison de la pénurie générale de fonds.

Efficacité des programmes

Les programmes précédents ont contribué de façon significative à la réalisation des priorités de la stratégie de Lisbonne visant à faire de l'UE «l'économie de la connaissance la plus compétitive et la plus dynamique du monde». Les programmes précédents ont apporté un financement de 1,15 milliard d'euros à quelque 7 300 entreprises et organisations des SCC, débouchant sur la création de 8 000 emplois¹⁵. Cependant, les programmes antérieurs auraient pu contribuer davantage aux objectifs stratégiques consistant à privilégier le citoyen («le citoyen d'abord») et à tirer parti des «nouvelles» technologies.

De même, ***le programme Europe créative répond aux priorités stratégiques de l'UE***. Il contribue de façon importante à la mise en œuvre de l'objectif d'Europe 2020 en matière d'emploi et des priorités de la Commission actuelle: stimuler l'investissement afin de créer de l'emploi, et mettre en place un marché intérieur plus approfondi et plus équitable, doté d'une base industrielle renforcée. Entre 2014 et 2016, Europe créative a fourni 544 millions d'euros de financement à quelque 2 600 entreprises et organisations des SCC, ce qui a débouché sur la création d'environ 3 000 emplois selon les estimations.

14 Considérant 19 du règlement n° 1295/2013 établissant le programme Europe créative.

15 Cela représente un soutien financier de 769 million d'euros pour Media, 364 millions d'euros pour Culture et 14 million d'euros pour MEDIA Mundus. 2 800 entités ont bénéficié de ce soutien dans le secteur audiovisuel et 4 500 dans le secteur culturel.

Tant Europe créative que les programmes précédents ont contribué aux stratégies sectorielles de l'UE. Dans le cadre d'Europe créative, le sous-programme MEDIA contribue de plus en plus à la stratégie pour un marché unique numérique.¹⁶ En effet, les actions axées sur le numérique sont en plein essor, à la fois en termes de portée et d'échelle. Les actions MEDIA en matière de formation, de distribution et de développement ont contribué au renforcement des capacités dans le secteur audiovisuel en ce qui concerne l'utilisation des technologies numériques et la distribution d'œuvres audiovisuelles en Europe et ailleurs.

De plus, le sous-programme MEDIA a aidé l'industrie audiovisuelle européenne à s'adapter à l'acquis communautaire. Il prévoit des mesures d'accompagnement des réformes du droit d'auteur, par exemple en soutenant les catalogues de films européens, le soutien aux plateformes d'octroi de licences, le soutien à une utilisation plus efficace du sous-titrage et un plan d'action sur l'animation. En outre, le nouveau programme "Promotion des œuvres européennes en ligne" soutient l'adaptation de l'industrie aux dispositions proposées de la future Directive SMAV sur un quota d'œuvres européennes pour les services de VSD et l'obligation de faire de tels travaux.

Le sous-programme Culture contribue également aux objectifs de la stratégie pour un marché unique numérique. Cette contribution comprend la création de nouveaux produits en ligne et l'attraction d'un public en ligne, ainsi que l'utilisation de la technologie numérique pour promouvoir les œuvres culturelles; l'augmentation du niveau d'activité numérique des réseaux et organisations culturels; et un soutien au renforcement des capacités requises et à l'utilisation des méthodes de promotion numérique. Il serait cependant possible de reconnaître davantage les contributions des deux sous-programmes à la stratégie pour un marché unique numérique.

Les sous-programmes MEDIA et Culture ont principalement contribué aux deux premiers des trois objectifs clés de l'agenda européen de la culture, à savoir (i) la diversité culturelle et le dialogue interculturel; et (ii) la culture en tant que catalyseur de la créativité¹⁷. Cependant, la contribution des programmes MEDIA à l'agenda européen de la culture aurait pu être plus importante, mais il faudrait prendre davantage conscience de leur utilité pour l'agenda.

Les programmes précédents ont rempli la plupart de leurs objectifs généraux et spécifiques. Par exemple, le programme MEDIA précédent a contribué à:

- générer au total 492 millions d'entrées pour les films distribués avec le soutien du programme;
- développer plus de 3 000 titres audiovisuels européens qui ont permis de produire 1 460 œuvres audiovisuelles, dont environ 850 ont été commercialisées; et
- améliorer les compétences d'environ 8 800 professionnels de l'audiovisuel, au profit de l'innovation et de la compétitivité.

Le programme MEDIA précédent aurait pu anticiper de manière plus efficace l'évolution du marché, en particulier le passage au numérique, et mieux corriger les déséquilibres du marché.

Le programme Culture précédent a contribué à:

- atteindre environ 8,8 millions de personnes grâce aux seuls projets de coopération;

¹⁶ La stratégie s'articule autour de trois piliers: (i) améliorer l'accès aux biens et services numériques dans toute l'Europe; (ii) créer un environnement propice au développement des réseaux et services numériques; et (iii) maximiser le potentiel de croissance de l'économie numérique.

¹⁷ Le dernier objectif est (iii) la culture dans les relations internationales de l'UE.

- accroître la circulation transnationale des artistes et autres professionnels en soutenant les expériences de mobilité d'environ 214 500 acteurs culturels;
- accroître la circulation transnationale des œuvres culturelles et créatives européennes en contribuant, par exemple, à 3200 traductions littéraires et à la vente d'au moins 2,9 millions de livres;
- renforcer les capacités et les réseaux des opérateurs culturels pour le travail transnational en soutenant quelque 261000 acteurs culturels et 4550 opérateurs culturels.

Le programme Culture précédent a modérément réussi à préserver et promouvoir la diversité culturelle et linguistique, à renforcer l'innovation et la créativité dans les SCC européens, à promouvoir le dialogue et la compréhension interculturels ainsi que l'élargissement du public visé et à améliorer la compétitivité des opérateurs bénéficiant d'un soutien. Le programme Culture précédent aurait pu renforcer davantage la position financière des opérateurs culturels et mieux promouvoir leur travail avec les groupes sous-représentés.

Si le programme MEDIA Mundus a permis d'améliorer les connaissances des professionnels européens et des pays tiers en matière de marchés audiovisuels, il s'est avéré moins efficace pour faciliter l'accès aux films de pays tiers sur les marchés européens.

Europe créative réalise la plupart de ses objectifs généraux et spécifiques, en assurant un équilibre judicieux entre les objectifs généraux de diversité et de compétitivité. Globalement, le programme a permis de préserver et de promouvoir la diversité culturelle et linguistique et de renforcer la compétitivité des SCC européens.

Les dispositions relatives à la discrimination positive (c'est-à-dire aux conditions de concurrence équitable) du sous-programme MEDIA d'Europe créative permettent d'assurer un meilleur équilibre entre les questions de diversité et de compétitivité que celles du programme précédent. Dans Europe Créative, les dispositions relatives à la discrimination positive favorisent surtout les pays à capacité de production moyenne au détriment des pays à forte capacité de production. Les pays présentant une faible capacité de production ont également bénéficié de ces dispositions, mais dans une moindre mesure. Cette variation est due au fait que les pays à faible capacité de production ont beaucoup plus de difficulté que les pays affichant une capacité de production moyenne pour accéder au soutien du sous-programme MEDIA. Une révision de l'ensemble des mesures de conditions de concurrence équitables a été adoptée en 2017 en accord avec le Comité du Programme afin d'éviter des conséquences imprévues¹⁸.

Dans le cadre d'Europe créative, le soutien de MEDIA a aidé les entreprises à se croître, à augmenter le volume de leurs opérations, à développer leurs portefeuilles et leurs partenariats, mais de façon modérée. Les programmes MEDIA ont davantage contribué à façonner de nouveaux partenariats transnationaux et à renforcer les partenariats existants.

Dans le cadre d'Europe créative, le soutien du sous-programme Culture a été rééquilibré entre les différents sous-secteurs culturels. La priorité accordée aux objectifs économiques au détriment des considérations artistiques et sociales a suscité des inquiétudes. Par rapport au programme précédent, la taille moyenne des projets soutenus a plus que doublé. Cependant, le nombre d'opérateurs a été réduit d'un tiers en raison de l'orientation du programme, axé sur la compétitivité. Le sous-programme a néanmoins soutenu une grande variété de secteurs culturels, qu'ils aient ou non une dimension industrielle marquée. Enfin, les activités soutenues par les programmes

¹⁸ Une note mise à jour du LPF devrait refléter le compromis proposé dans le document WP 2018.

Culture contribue à la création d'un «espace culturel européen» et, à travers cet espace, à leur objectif général de promotion de la diversité. Par exemple, la plupart des actions des programmes Culture mettent un accent particulier sur l'élargissement du public visé. Il s'agit de faire connaître les œuvres culturelles européennes au-delà du territoire national et de conquérir de nouveaux publics.

Le mécanisme de garantie en faveur des SCC devrait faciliter l'objectif spécifique visant à offrir un accès au financement aux PME appartenant à ces secteurs. Ce mécanisme a commencé à fonctionner deux ans après le lancement du programme Europe créative car le budget n'était disponible qu'à partir de 2016. Il est probable que ce report ait eu un impact négatif sur l'accès au financement des PME dans les secteurs de l'audiovisuel et de la culture en Europe, et donc sur la réalisation de cet objectif spécifique. Cependant, depuis 2016, la mise en œuvre du mécanisme a été très efficace comme l'indique le fait que le montant total des garanties ait été alloué aux intermédiaires financiers et que les fonds disponibles pour financer le mécanisme en 2016 et 2017 soient épuisés.

Les programmes MEDIA et Culture précédents ont été efficaces, comme en témoignent leurs principales réalisations, leurs résultats et leurs impacts. Néanmoins, MEDIA Mundus a eu un impact plus limité.

Les sous-programmes d'Europe créative en cours cherchent à livrer les produits, les résultats et les effets prévus. Certains aspects de l'efficacité opérationnelle des actions (concernant, par exemple, l'élargissement du public visé, la couverture géographique et/ou l'impact sur l'emploi) pourraient être améliorés. Le volet intersectoriel d'Europe créative a livré certains de ses produits, résultats et impacts, mais les retards dans la mise en œuvre du mécanisme de garantie en faveur des SCC et la sous-utilisation des mesures de coopération politique transnationale laissent entrevoir des améliorations possibles dans l'efficacité de la mise en œuvre. On pourrait notamment mettre en place le cadre de suivi des performances du programme pour le programme actuel (élaboré dans le cadre de cette évaluation).

Efficiences des programmes

Le programme couvre une multitude et une très grande variété de secteurs audiovisuels et culturels au niveau européen et une surface géographique considérable. Le budget d'Europe créative et des programmes précédents n'était donc pas suffisant pour créer un impact majeur à l'échelle européenne ou au niveau sectoriel. C'est notamment le cas du programme Culture précédent et du sous-programme qui lui a succédé, qui couvrent une plus grande variété de sous-secteurs. En effet, en 2014, les SCC en Europe représentaient environ 560 milliards d'euros (ou 4,5 % du PIB de l'UE) et employaient 8,5 millions de travailleurs (3,8 % de la main-d'œuvre européenne totale). En comparaison, les trois programmes antérieurs ont affecté 1,1 milliard d'euros à l'ensemble des SCC au cours de la période 2007-2013. Le nombre réduit d'actions dans le cadre du programme actuel par rapport aux programmes précédents indique un meilleur ciblage. De même, le soutien financier alloué aux bureaux précédents et aux bureaux d'Europe créative a été jugé crucial et devrait être maintenu au niveau actuel. Cependant, l'évaluation a révélé des possibilités de gains d'efficacité.

La rentabilité des programmes a été satisfaisante et a augmenté d'une période de programmation à l'autre. L'efficacité de la plupart des actions examinées s'est améliorée ou est restée stable, à quelques exceptions près. L'augmentation du coût par projet a généralement accru le nombre de réalisations et/ou généré des résultats ou des impacts plus importants.

Les lacunes concernent principalement la gouvernance et la gestion de la mise en œuvre du programme. Le regroupement des programmes Culture et Médias au sein d'un même cadre global n'a pas donné tous les résultats escomptés. Par exemple, les économies

prévues dans les coûts de gestion du programme ne se sont pas entièrement matérialisées puisque le nombre d'ETP affectés au programme Europe créative a légèrement augmenté par rapport aux programmes précédents. Des augmentations similaires ont été constatées dans les coûts opérationnels et administratifs annuels.

Durabilité des programmes

La pérennité des résultats réside principalement dans la poursuite des partenariats initiés dans le cadre d'Europe créative et des programmes précédents. Avec MEDIA et Culture, la collaboration entre les partenaires des projets se poursuit d'une manière ou d'une autre au-delà du cycle de vie des projets. Avec MEDIA, la durabilité se retrouve également dans l'intention et la capacité des organisations de poursuivre la coproduction européenne, c'est-à-dire dans l'intérêt soutenu pour la (co)production ou la distribution d'œuvres de dimension européenne. Cependant, par rapport aux projets Culture, les projets MEDIA ont moins souvent débouché sur une collaboration continue entre les partenaires ou sur d'autres formes de suivi. Cette différence peut s'expliquer en partie par la nature spécifique de certaines actions MEDIA, qui se concentrent moins sur le développement de la coopération entre les partenaires du projet et davantage sur la réalisation d'un projet spécifique.

La durabilité des impacts passe aussi par les échanges d'apprentissage lors de la mise en œuvre des projets et par la diffusion des résultats de cet apprentissage. Ces échanges se traduisent par le développement de nouvelles qualifications et compétences et par l'utilisation des résultats des projets soutenus dans l'ensemble du secteur, ce qui entraîne une professionnalisation du secteur et renforce la capacité des opérateurs à travailler à l'échelle internationale et transnationale. Cela a été le cas pour tous les programmes, mais plus particulièrement pour le sous-programme Culture et le programme précédent.

Valeur ajoutée européenne des programmes

La principale valeur ajoutée attribuable à l'UE provient de la forte dimension internationale des programmes. Seuls quelques autres fonds internationaux soutiennent la coopération transnationale, et ils sont beaucoup plus modestes. La plupart des activités *bénéficiant d'un soutien* auraient vu leur taille ou leur portée réduite de manière significative ou n'auraient jamais vu le jour sans les financements fournis par Europe créative et les programmes précédents. L'importance du financement dans les activités soutenues est très différente en fonction du programme et de l'action concernés:

- Pour MEDIA, la plupart des activités ayant bénéficié d'un soutien font généralement partie d'une chaîne de valeur plus vaste allant du développement à la distribution de contenu. Le financement contribue donc à une ou plusieurs étapes spécifiques de la chaîne de valeur. Ces activités auraient été mises en œuvre sous une forme ou une autre, mais de façon plus modeste en ce qui concerne leur portée géographique, la qualité des œuvres audiovisuelles soutenues ou la taille du public touché. MEDIA offre aussi un soutien unique à la promotion de (co)productions susceptibles de plaire à un public transfrontalier.
- Dans le cas de Culture, les activités financées ne sont pas aussi étroitement intégrées aux processus existants, bien qu'elles soient généralement étroitement alignées sur les activités et les objectifs généraux de l'organisation. Par exemple, un projet de coopération a produit un nouveau modèle de renforcement des compétences dans les orchestres basé sur l'apprentissage transnational qui, tout en s'appuyant sur les activités existantes des organisations participantes, constituait une initiative autonome. Ce type d'activité peu très difficilement se produire sans le financement de l'UE.

La valeur ajoutée européenne des programmes réside dans les éléments suivants:

- la création de réseaux internationaux et de partenariats transfrontaliers, qui constituent les éléments structurants principaux et les plus durables d'Europe créative;
- l'aptitude des réseaux transnationaux à renforcer aussi les capacités de l'ensemble des opérateurs des CSC20, en particulier de ceux qui travaillent dans des créneaux particuliers et dans des États membres où ces capacités sont moins développées;
- le soutien à la prise de risques (calculés) pour les organisations, ce qui leur permet de se concentrer sur un fonctionnement à dimension européenne;
- l'effet des programmes sur la réputation des bénéficiaires, qui augmente l'intérêt potentiel des partenaires et des intermédiaires financiers et leur confiance dans les projets soutenus. Cet aspect lié à la réputation faciliterait également l'accès à des financements supplémentaires.

Recommandations

Les grandes recommandations issues de l'évaluation s'articulent autour des principaux critères d'évaluation et abordent les principales opportunités et les principaux défis du programme tels que présentés dans la section précédente. La section 4 du rapport fournit le détail de ces recommandations.

Pertinence des programmes

- Donner la priorité au développement de projets transmédias pour assurer la pertinence de l'offre audiovisuelle à la lumière de l'évolution des modes de consommation;
- Ajuster les règles de concurrence équitable pour les rendre plus pertinentes à la dynamique du marché audiovisuel;
- étendre la portée du soutien à l'industrie européenne des jeux vidéo;
- Veiller à ce que le sous-programme Culture soit adapté aux besoins de développement des opérateurs culturels;
- Fournir un soutien plus souple aux opérateurs culturels pour répondre au changement;
- Veiller à ce que le programme de traduction littéraire soutienne la diversité linguistique; et,
- Mieux utiliser le volet transsectoriel.

Cohérence des programmes

- Maximiser l'échange d'information sur les agendas politiques respectifs;
- Développer une réponse plus cohérente à travers le sous-programme MEDIA à l'évolution des technologies et des modèles commerciaux dans le secteur audiovisuel;
- Veiller à ce que les opportunités complémentaires au sein des sous-programmes et d'autres sources de financement de l'UE soient suffisamment connues et claires; et,
- Assurer la cohérence avec les sources de financement internationales et nationales.

Efficacité des programmes

- Améliorer la conception du programme Creative Europe actuel;

19 Notez qu'il existe des signes indiquant des effets de structuration progressive, même si la fragmentation du secteur entrave ce phénomène.

20 La mise en place de collaborations et de partenariats internationaux durables a permis de garantir le renouvellement des financements, ce qui a aidé les entreprises prenant part à ces partenariats à se développer et à intensifier leurs opérations.

- Accroître l'intégration des stratégies sectorielles dans l'ensemble du programme Europe créative;
- Renforcer l'accent sur les publics;
- Envisager des moyens d'améliorer l'impact du volet transsectoriel;
- Concernant MEDIA, réduire davantage les déséquilibres dans la nationalité des bénéficiaires du financement du programme par les règles de concurrence équitable ;
- Mettre en œuvre les activités de suivi du programme et les rapports connexes et affiner le cadre de suivi en fonction de l'évolution des marchés et des priorités politiques.

Efficiences des programmes

- Destiner les allocations budgétaires aux actions les plus efficaces afin de générer les impacts souhaités;
- Améliorer la conception des systèmes de gestion, de gouvernance et de suivi des programmes ainsi que le fonctionnement des bureaux d'Europe créative.

Durabilité des programmes

- Renforcer les mécanismes de diffusion des résultats des projets financés afin de rendre leurs impacts plus durables;
- Concevoir une stratégie pour mieux tirer parti des réalisations ayant bénéficié d'un soutien.

Valeur ajoutée européenne des programmes

- Capitaliser sur les partenariats et les réseaux développés à travers des projets soutenus, et qui sont essentiels à la valeur ajoutée Européenne du programme.

Résumé

L'évaluation intermédiaire du programme Europe créative et l'évaluation ex post des trois programmes précédents, Culture, MEDIA 2007 et MEDIA Mundus, évaluent la pertinence, la cohérence, l'efficacité, l'efficience, la durabilité et la valeur ajoutée européenne de ces programmes, ainsi que les résultats et impacts à long terme des programmes précédents. Ces travaux prennent en compte le contexte de mise en œuvre des programmes et analysent également leur contribution à une croissance intelligente, durable et inclusive ainsi que les nouvelles priorités de la Commission, notamment la stratégie pour un marché unique numérique et l'agenda européen de la culture. En résumé, les programmes se sont avérés adaptés aux besoins émergents des secteurs de la création et de la culture concernés par la mondialisation et le passage au numérique; ils présentent dans l'ensemble une bonne cohérence interne; leur cohérence externe avec les politiques des États membres, les actions de l'UE et les autres interventions internationales est satisfaisante; ils font preuve d'efficacité et d'efficience dans la production des résultats attendus; ils génèrent des impacts relativement durables et apportent une valeur ajoutée européenne significative, principalement en soutenant la coopération transnationale dans le secteur. Il est recommandé d'améliorer la conception du programme actuel et futur, de l'adapter aux défis à venir, d'assurer une bonne communication à propos des autres sources de financement disponibles, de destiner les allocations budgétaires aux actions les plus efficaces, de renforcer la diffusion des résultats des projets et de tirer parti des réseaux développés dans le cadre des projets soutenus.

Exposé sommaire

- Europe créative présente quelques problèmes de conception. On observe en effet un manque de clarté dans la définition et la hiérarchisation des objectifs, de l'impact souhaités des dispositions relatives aux conditions de concurrence équitable et des liens holistiques avec les stratégies de l'UE. Par conséquent, il est recommandé de réduire le nombre d'objectifs, d'établir des objectifs clairs et pertinents pour l'ensemble des stratégies des SCC et de l'UE et de définir des conditions de concurrence équitable et la valeur ajoutée européenne du programme.
- La mesure des performances et les pratiques de suivi au niveau du programme sont actuellement très limitées. Il est recommandé de mettre en œuvre dès que possible les activités de suivi du programme et les mécanismes de rapport connexes, et d'affiner le cadre élaboré en fonction de l'évolution des marchés et des priorités politiques.
- Le fait de regrouper les programmes Culture et Médias au sein d'un même cadre global n'a pas vraiment amélioré l'efficacité dans la gestion du programme. Il est recommandé d'intégrer les pratiques de gestion du programme et d'augmenter la fréquence des activités liées à la gouvernance pour le pilotage du Programme.
- Le programme n'offre pas une réponse suffisante aux besoins nouveaux et émergents des SCC. Par conséquent, il est recommandé d'identifier et de soutenir au plus tôt les domaines dans lesquels le programme pourrait maintenir sa valeur ajoutée européenne.
- Le programme Europe créative pourrait être plus efficace concernant l'élargissement du public visé par les deux sous-programmes. Il est recommandé de rééquilibrer les performances des actions des sous-programmes d'Europe créative en révisant le soutien financier destiné aux sous-secteurs créatifs et culturels (côté offre), et de stimuler la demande d'œuvres culturelles et créatives européennes non nationales (côté demande).
- Les bénéficiaires du programme ont du mal à accéder aux financements et ne sont pas toujours au courant des autres sources de financement européen dans leur secteur. Il est recommandé (1) de recourir aux activités de communication du programme pour faire connaître les financements que proposent d'autres programmes financés par l'UE, (2) d'aligner les financements des autres interventions réalisées à tous les niveaux de gouvernance sur Europe créative, (3) de continuer à mettre en œuvre le mécanisme de garantie en faveur des SCC.
- Les synergies intersectorielles dans le cadre des activités du programme ne sont pas exploitées de façon systématique. Par conséquent, il est recommandé d'accroître le dialogue interservices, la planification stratégique et opérationnelle entre les DG responsables du programme et de renforcer les liens entre les activités soutenues par le programme et tous ses objectifs spécifiques. En outre, l'augmentation du volume d'activités dans le cadre de la coopération politique transnationale du volet intersectoriel pourrait également contribuer à faire connaître les résultats du programme, les synergies potentielles et les possibilités de coopération qu'offre Europe créative.
- Le niveau de soutien financier peut être insuffisant pour certains petits opérateurs du secteur et dans les territoires des États membres. Il est recommandé de destiner les allocations budgétaires aux actions les plus efficaces et présentant la plus forte valeur ajoutée européenne, c'est-à-dire les actions qui visent à promouvoir l'expansion des opérateurs et à tirer parti des avantages de l'internationalisation de la coproduction et

de l'apprentissage, en mettant l'accent sur la diversité culturelle, pour certaines, et sur la promotion de la compétitivité des SCC, pour d'autres.

- La principale valeur ajoutée d'Europe créative et des programmes précédents provient de la forte dimension internationale des programmes, assez inédite en Europe. Il est donc recommandé de tirer parti des partenariats et des réseaux développés dans le cadre des projets ayant bénéficié d'un soutien.

Zusammenfassung

1 Einführung

Dieser Bericht fasst die Kernfeststellungen der Zwischenevaluation des Programms Kreatives Europa sowie der Ex-Post-Evaluation der drei Vorläuferprogramme zusammen: Kultur, MEDIA 2007 und MEDIA Mundus. Diese Evaluationen wurden 2016 von der Generaldirektion Bildung und Kultur der Europäischen Union (DG EAC) in Auftrag gegeben und zwischen Mai 2016 und August 2017 vorgelegt. Die Evaluationen des Programms Kreatives Europa und der Vorläuferprogramme dienen folgenden Zwecken:

Beurteilung der Relevanz, Kohärenz, Wirksamkeit, Effizienz, Nachhaltigkeit und des EU-Mehrwertes (nachstehend als Evaluationskriterien bezeichnet) des Programms Kreatives Europa und der Vorläuferprogramme;

Beurteilung des Beitrages des Programms Kreatives Europa zu einem intelligenten, nachhaltigen und integrativem Wachstum, den neuen Prioritäten und sektoralen Strategien der Kommission; sowie

Beurteilung der langfristigen Ergebnisse und Auswirkungen der Vorläuferprogramme.

2 Gegenstand der Evaluation

Das Programm Kreatives Europa ist das aktuelle siebenjährige Programm (2014-2020) zur Förderung der kulturellen und kreativen Sektoren (CCS)²¹. Das Programm Kreatives Europa hat zwei allgemeine Ziele: Wahrung der kulturellen und sprachlichen Vielfalt und Stärkung der Wettbewerbsfähigkeit dieser Sektoren, sowie vier spezifische Ziele: Förderung der Fähigkeit der europäischen Kultur- und Kreativsektoren, länderübergreifend und international zu arbeiten, Förderung der Zirkulation kultureller und kreativer Werke und Künstler, Stärkung der Finanzkraft der sektoralen KMU und Förderung von Innovation und Publikumsentwicklung durch politische Kooperation²².

Das Programm Kreatives Europa vereint die Vorläuferprogramme (Kultur, MEDIA und MEDIA Mundus), die unter dem mehrjährigen Finanzrahmen 2007-2013 eingerichtet wurden und dient sowohl der Vereinfachung, als auch der Erweiterung dieser bisherigen Programme.

Das Programm setzt sich aus drei Bereichen zusammen: dem Unterprogramm MEDIA (welches die bisherigen Programme MEDIA und MEDIA Mundus ersetzt), dem Unterprogramm Kultur und dem sektorübergreifenden Bereich (welcher sektorübergreifende Aspekte des Programms abdeckt). Der Umfang des Programms Kreatives Europa ist größer als jener der Vorläuferprogramme, sowohl hinsichtlich der Größe der Sektoren, als auch hinsichtlich der teilnahmeberechtigten Einrichtungen. Die Veränderungen gegenüber den Vorläuferprogrammen reflektieren sowohl die Entwicklung des Kultur- und Kreativsektors, als auch die veränderten politischen Prioritäten der Europäischen Kommission. Die wirtschaftlichen Beiträge des Kultur- und Kreativsektors stehen mehr im Vordergrund und führen innerhalb des Programms zu einer stärkeren Betonung von:

- Wirtschaftlicher Entwicklung und Schaffung von Arbeitsplätzen;
- Wettbewerbsfähigkeit des Kultur- und Kreativsektors;
- neue Management- und Geschäftsmodelle;
- Publikumsentwicklung als neu ausgerichtete Priorität; und
- digitale Lösungen, insbesondere für die Zirkulation von Werken.

²¹ Das Mandat des Programms beruht auf Artikel 166 AEUV zur Politik der beruflichen Bildung, Artikel 167 AEUV zur kulturellen Entfaltung und Artikel 173 zur Industriepolitik.

²² Artikel 3 und 4 der Verordnung 1295/2013 zur Einrichtung des Programms Kreatives Europa.

3 Methodischer Ansatz für die Evaluation

Die Evaluation hat zur Beurteilung der Performance des Programms Kreatives Europa und der Vorläuferprogramme anhand jedes der Evaluationskriterien einen analytischen Rahmen verwendet. Der analytische Rahmen bestand aus 78 Evaluationsfragen sowie entsprechenden Beurteilungskriterien, Indikatoren und Verifizierungsmethoden.

Der methodische Ansatz für die Evaluation kombinierte eine Reihe von Datenerfassungs- und -bewertungsmethoden, einschließlich Programmdatenanalyse, Sekundärforschungen, Stakeholder-Konsultationen, Befragungen, Umfragen unter Programmbegünstigten und einer öffentlichen Konsultation (OPC). Der Ansatz beinhaltete sechs fokussierte Evaluationen (FEs) zu 10 der wesentlichen Programmsysteme.

Darüber hinaus werden zusätzliche detaillierte Analysen in zwei Anhängen erläutert. Erstens eine Betrachtung der MEDIA-Wettbewerbsbedingungen und deren Auswirkungen. Zweitens eine kritische Betrachtung der vorhandenen Monitoring- und Evaluationsindikatoren²³ sowie die Darstellung eines vorgeschlagenen Programm-Monitoring-Rahmens (PMF) für das Programm Kreatives Europa.

Die Stärken und Grenzen dieses Ansatzes sind unter Ziffer 2.4 erläutert.

4 Evaluationsergebnisse

Die Ergebnisse der Evaluation sind anhand von sechs Evaluationskriterien strukturiert.

Relevanz der Programme

Das Programm Kreatives Europa begegnet den wesentlichen Herausforderungen des Kultur- und Kreativsektors. Der Zugang zu öffentlicher und privater Finanzierung stellt die größte Herausforderung für den Kultur- und Kreativsektor dar, insbesondere aufgrund des mit der Globalisierung und der digitalen Verschiebung einhergehenden gestiegenen Wettbewerbs.

Die Bürgerschaftsfazilität für den Kultur- und Kreativsektor (CCS GF) wird von den Finanzmittlern als Chance gesehen, in den Sektor vorzustoßen und/oder vorhandene Geschäftszweige mit einem geringeren Risiko auszubauen. Dies wird letztlich zu einem besseren Zugang zu Finanzierungen für die Akteure des Kultur- und Kreativsektors und zu einer verbesserten Entwicklung ihrer Fähigkeiten führen und damit potenziell Wachstum und Beschäftigung erzeugen.

Das Programm Kreatives Europa begegnet sowohl den vorhandenen, als auch den aufkommenden Bedürfnissen der audiovisuellen und kulturellen Sektoren. In den letzten zehn Jahren hat sich der Kontext für den Kultur- und Kreativsektor aufgrund radikal veränderter Verbrauchsmuster und einem durch die Globalisierung bedingten gestiegenen Wettbewerb dramatisch gewandelt. Die hauptsächlichen Anforderungen für eine kontinuierliche Relevanz des europäischen Kultur- und Kreativsektors sind: Kapazitätsaufbau, Professionalisierung, Publikumsentwicklung und Zugang zu Finanzierung.

Insgesamt sind durch das Programm Kreatives Europa *aufkommende* Anforderungen erfasst und teilweise angesprochen worden, wobei auf Erkenntnissen aus den MEDIA- und Kulturprogrammen der Jahre 2007-2013 aufgebaut wurde. Diese aufkommenden Anforderungen beziehen sich hauptsächlich auf die anhaltenden Auswirkungen digitaler Technologien.

Das Programm Kreatives Europa ist auch für die veränderten Prioritäten der Sektoren, die von den Mitgliedstaaten verfolgten Strategien und die politischen Prioritäten der EU relevant.

²³ Artikel 18 der Verordnung 1295/2013 zur Einrichtung des Programms Kreatives Europa.

Interne Kohärenz der Programme

Das Programm Kreatives Europa sieht eine Reihe von Maßnahmen zur Förderung der audiovisuellen und kulturellen Sektoren vor und weist hinsichtlich der Unterprogramme MEDIA und Kultur eine interne Kohärenz auf. Das Unterprogramm MEDIA bietet eine kohärente Abdeckung der unterschiedlichen Stadien der Wertschöpfungskette und das Unterprogramm Kultur begegnet den vielfältigen Bedürfnissen des kulturellen Sektors in weitgehend kohärenter Weise.

Übereinstimmend mit der Verordnung „Kreatives Europa“²⁴ berücksichtigt das Programm die spezifischen Eigenschaften der unterschiedlichen Sektoren durch maßgeschneiderte Ansätze innerhalb der beiden unabhängigen Unterprogramme und des sektorübergreifenden Bereichs. Der sektorübergreifende Bereich wurde geschaffen, um die interne Kohärenz des Programms Kreatives Europa zu verbessern und den sektorübergreifenden Bedürfnissen in kohärenter Weise zu begegnen. Die interne Kohärenz des Programms könnte jedoch durch einen stärkeren Fokus auf sektorübergreifende Aktivitäten noch weiter verbessert werden.

Externe Kohärenz der Programme

Die Ziele und Prioritäten des Programms Kreatives Europa weisen insgesamt eine Kohärenz und Komplementarität mit jenen der jeweiligen nationalen Politik und Programme auf und halten daher den Grundsatz der Subsidiarität ein. Der internationale Charakter des Programms Kreatives Europa sorgt für ein unterscheidendes Angebot, das nur selten durch eine nationale Förderung erreicht wird, die in der Regel auf inländische Maßnahmen fokussiert ist. Dieser internationale Fokus wird von Stakeholdern und Begünstigten als einzigartiges Element des Programms Kreatives Europa in hohem Maße geschätzt.

Das Programm Kreatives Europa ist im Wesentlichen kohärent mit anderen für die audiovisuellen und kulturellen Sektoren relevanten EU-Prioritäten, Finanzierungs- und Förderungsmechanismen, einschließlich sowohl der sektorspezifischen Möglichkeiten und der allgemeinen finanziellen, geschäftlichen und wirtschaftlichen Unterstützung von KMU. Das Unterprogramm MEDIA ergänzt die übrige EU-Finanzierung durch seine Förderung audiovisueller Projekte und Aktivitäten, die einen Kontrast zu der übrigen allgemeinen geschäftlichen und wirtschaftlichen Unterstützung bilden. Die Förderung des Unterprogramms Kultur wird zunehmend in andere EU-Finanzierungsmöglichkeiten integriert, d.h. dass kulturelle Projekte und Aktivitäten sich für andere Formen der EU-Förderung ohne einen spezifischen „kulturellen“ Fokus qualifizieren.

Das Programm Kreatives Europa besteht neben einer Reihe sich überschneidender politischer Maßnahmen und Programme auf internationaler Ebene, vermeidet jedoch aufgrund der Gesamtkürzung von Förderungen eine Duplizierung.

Wirksamkeit der Programme

Die Vorläuferprogramme haben einen signifikanten Beitrag zu den Prioritäten der Lissabon-Strategie, deren Ziel es war, die EU „zum wettbewerbsfähigsten und dynamischsten wissensgestützten Wirtschaftsraum der Welt“ zu machen. Die Vorläuferprogramme haben mit € 1,15 Mrd. rund 7.300 Betriebe und Organisationen im Kultur- und Kreativsektor gefördert, wodurch geschätzt 8.000 Arbeitsplätze geschaffen wurden²⁵. Die Vorläuferprogramme hätten indes noch mehr tun können, um zu den

²⁴ In Erwägung von Artikel 19 der Verordnung 1295/2013 zur Einrichtung des Programms Kreatives Europa.

²⁵ Dieser Betrag setzt sich zusammen aus € 769 Mio. finanzieller Förderung für MEDIA, € 364 Mio. für Kultur und € 14 Mio. für MEDIA Mundus. 2.800 Empfänger im audiovisuellen Sektor und 4.500 Empfänger im kulturellen Sektor haben von der Förderung profitiert.

strategischen Zielen, „den Bürger an erste Stelle setzen“ und „neue“ Technologien zu nutzen, beizutragen.

In ähnlicher Weise **erfüllt das Programm Kreatives Europa die strategischen EU-Prioritäten**. Das Programm leistet einen wichtigen Beitrag zum EU2020-Beschäftigungsziel und den Prioritäten der derzeitigen Kommission: Stimulierung von Investitionen zum Zwecke der Schaffung von Arbeitsplätzen; sowie ein tieferer und fairerer interner Markt mit einer gestärkten Industriebasis. Zwischen 2014 und 2016 hat das Programm Kreatives Europa rund 2.600 Betriebe und Organisationen im Kultur- und Kreativsektor mit € 544 Mio. gefördert, wodurch geschätzt 3.000 Arbeitsplätze geschaffen wurden.

Sowohl das Programm Kreatives Europa, als auch die Vorläuferprogramme haben zu den sektoralen Strategien der EU beigetragen. Unter dem Programm Kreatives Europa trägt das Unterprogramm MEDIA zunehmend zur Strategie des digitalen Binnenmarkts (DSMS) bei²⁶, da sich Maßnahmen mit einem digitalen Fokus sowohl dem Umfang, als auch der Größe nach ausweiten. Die Trainings-, Vertriebs- und Entwicklungsprogramme des Sektors MEDIA haben dazu beigetragen, Kapazitäten im audiovisuellen Sektor sowohl für den Einsatz digitaler Technologien, als auch für den Vertrieb audiovisueller Werke in Europa und darüber hinaus zu entwickeln.

Darüber hinaus half das Unterprogramm MEDIA der europäischen audiovisuellen Industrie sich an das *acquis communautaire* anzupassen. Zusätzlich zu den Urheberrechtsreformen stellt es Mittel zur Verfügung, wie zum Beispiel durch die Unterstützung von Katalogen europäischer Filme, die Unterstützung für Lizenzierungszentren, die Unterstützung zur effizienteren Untertitelung und eines Aktionsplans Animation. Auch das neue Programm „Promotion of European Works Online“ unterstützt die zukünftige Anpassung der Industrie an die vorgeschlagenen Bestimmungen der AVMS Richtlinie zur Quote europäischer Werke bei VOD-Anbietern und der Pflicht solche Werke hervorzuheben.

Ebenso trägt das Unterprogramm Kultur zu den Zielen der Strategie des digitalen Binnenmarktes bei. Dieser Beitrag umfasst die Schaffung neuer Online-Angebote und die Gewinnung eines Online-Publikums sowie die Ermöglichung des Einsatzes digitaler Technologien zur Verbreitung kultureller Werke; die Steigerung des Grades digitaler Aktivität kultureller Netzwerke und Organisationen; sowie die Unterstützung eines relevanten Kapazitätsaufbaus und der Verwendung digitaler Vermarktungsansätze. Es besteht jedoch Verbesserungspotenzial hinsichtlich der Wahrnehmung der Beiträge beider Unterprogramme zur Strategie des digitalen Binnenmarktes.

Den größten Beitrag zur europäischen Kulturagenda leisten die Unterprogramme MEDIA und Kultur zu den ersten beiden der drei Kernziele der Agenda, nämlich (i) kulturelle Vielfalt und interkultureller Dialog; sowie (ii) Kultur als Katalysator für Kreativität²⁷. Der Beitrag der Programme des Sektors MEDIA zur europäischen Kulturagenda hätte jedoch bedeutender sein können, da die Relevanz von MEDIA für die Agenda ebenfalls noch einer größeren Wahrnehmung bedarf.

Die Vorläuferprogramme haben die meisten ihrer allgemeinen und spezifischen Ziele erreicht. So hat beispielsweise das Vorläufer-MEDIA-Programm dazu beigetragen,

- insgesamt 492 Millionen Zulassungen für den Vertrieb von Filmen mit der Unterstützung des Programms zu erhalten;

²⁶ Die Strategie ruht auf drei Säulen (i) „Besserer Zugang zu digitalen Waren und Dienstleistungen innerhalb der EU“; (ii) „Optimale Rahmenbedingungen für digitale Netze und Dienstleistungen“; und (iii) „Digitale Wirtschaft als Wachstumsmotor“.

²⁷ Das letzte Ziel ist (iii) Kultur in den internationalen Beziehungen der EU.

- mehr als 3.000 europäische audiovisuelle Titel zu entwickeln, was zur Produktion von 1.460 audiovisuellen Werken geführt hat, von denen es 850 in den Markt geschafft haben; und
- die Kompetenzen von rund 8.800 audiovisuellen Akteuren zu verbessern und damit ihre Innovation und Wettbewerbsfähigkeit zu fördern.

Das Vorläufer-MEDIA-Programm hätte effektiver in der Förderung von Marktentwicklungen sein können, einschließlich der digitalen Verschiebung und der Bewältigung von Marktungleichgewichten.

Das Vorläufer-Kultur-Programm hat dazu beigetragen,

- geschätzt 8,8 Millionen Menschen alleine durch Kooperationsprojekte zu erreichen;
- die internationale Zirkulation von Künstlern und weiteren Fachkräften durch Förderung von Mobilitätserfahrungen von rund 214.500 kulturellen Akteuren zu erhöhen;
- die internationale Zirkulation europäischer kultureller und kreativer Werke zu erhöhen, beispielsweise durch 3.200 literarische Übersetzungen und den Verkauf von mindestens 2,9 Millionen Büchern;
- die Kapazitäten und Netzwerke kultureller Einrichtungen für eine internationale Arbeit durch Unterstützung von rund 261.000 kulturellen Akteuren und 4.550 kulturellen Einrichtungen auszubauen.

Das Vorläufer-Kultur-Programm war mäßig erfolgreich in der Wahrung und Förderung kultureller und sprachlicher Vielfalt, Verbesserung von Innovation und Kreativität im europäischen Kultur- und Kreativsektor, der Förderung des interkulturellen Dialogs und Verständnisses, der Publikumsentwicklung und der Verbesserung der Wettbewerbsfähigkeit geförderter Einrichtungen. Das Vorläufer-Kultur-Programm hätte effektiver in der Stärkung der Finanzkraft kultureller Einrichtungen und der Vermarktung ihrer Werke in unterrepräsentierten Gruppen sein können.

MEDIA Mundus war effektiv in der Erweiterung der Kenntnisse audiovisueller Märkte für Fachkräfte aus Europa und Drittländern, jedoch weniger in der Erleichterung des Zugangs von Drittländern zu Filmen in den europäischen Märkten.

Das Programm Kreatives Europa erreicht die meisten seiner allgemeinen und spezifischen Ziele und wahrt effektiv das Gleichgewicht zwischen den allgemeinen Zielen Vielfalt und Wettbewerbsfähigkeit. Insgesamt war das Programm effektiv in der Wahrung und Förderung kultureller und sprachlicher Vielfalt und der Stärkung der Wettbewerbsfähigkeit des europäischen Kultur- und Kreativsektors.

Die Bestimmungen zur positiven Diskriminierung (d.h. die „Level Playing Fields“-Bestimmungen) des Unterprogramms MEDIA des Programms Kreatives Europa sind effektiver in der Wahrung des Gleichgewichts der Erwägungen zu Vielfalt und Wettbewerbsfähigkeit als jene der Vorläuferprogramme. Die Bestimmungen zur positiven Diskriminierung unter dem Programm Kreatives Europa haben meistens Länder mit mittlerer Produktionskapazität begünstigt, zum Nachteil der Länder mit hoher Produktionskapazität. Die Länder mit geringer Produktionskapazität haben ebenfalls von diesen Bestimmungen profitiert, jedoch in einem geringeren Umfang. Diese Abweichung ist der signifikant schwächeren Kapazität der Länder mit geringer Produktionskapazität im Vergleich zu Ländern mit mittlerer Produktionskapazität bei der Beurteilung der Förderung des Unterprogramms MEDIA geschuldet. Im Jahr 2017 wurde, in enger Abstimmung mit dem Programmkomitee, eine überarbeitete Anzahl von „Level Playing Fields“ Mitteln eingeführt, um unerwünschte Konsequenzen zu vermeiden.

Unter dem Programm Kreatives Europa hat die MEDIA-Förderung Unternehmen dabei geholfen, zu wachsen, den Umfang ihrer Geschäftsbetriebe, Portfolios und Partnerschaften auszuweiten - jedoch nur in mäßigem Umfang. Die MEDIA-Programme

haben einen größeren Beitrag zur Bildung neuer und zur Stärkung vorhandener internationaler Partnerschaften geleistet.

Unter dem Programm Kreatives Europa wurde das Unterprogramm Kultur in seiner Förderung unterschiedlicher kultureller Teilsektoren ausbalanciert. Die Priorisierung wirtschaftlicher Ziele vor künstlerischen und sozialen Erwägungen begegnet Bedenken. Verglichen mit dem Vorläuferprogramm hat sich die durchschnittliche Größe der geförderten Projekte mehr als verdoppelt. Indes ist die Anzahl der Einrichtungen mit der auf Wettbewerbsfähigkeit fokussierten Ausrichtung des Programms um ein Drittel zurückgegangen. Ungeachtet dessen hat das Unterprogramm eine Reihe unterschiedlicher kultureller Sektoren gefördert, unabhängig davon, ob diese eine markante industrielle Dimension aufwiesen. Schließlich tragen die durch die Kulturprogramme geförderten Maßnahmen zur Schaffung eines „europäischen Kulturraumes“ und dadurch zu ihrem allgemeinen Ziel einer Förderung der Vielfalt bei. So beinhalten beispielsweise die meisten der Teilprogramme des Kultur-Programms einen spezifischen Fokus auf Publikumsentwicklung mit dem Ziel, mit europäischen kulturellen Werke ein auswärtiges und neues Publikum zu erreichen.

Das spezifische Ziel des Zugangs zu Finanzierung für KMU im Kultur- und Kreativsektor wird wahrscheinlich durch die Bürgerschaftsfazilität für den Kultur- und Kreativsektor erleichtert. Die Bürgerschaftsfazilität für den Kultur- und Kreativsektor wurde zwei Jahre nach dem Start des Programms Kreatives Europa eingerichtet, da das Budget erst ab 2016 zur Verfügung stand. Es ist wahrscheinlich, dass diese Verschiebung negative Auswirkungen auf den Zugang zu Finanzierung für KMU in den audiovisuellen und kulturellen Sektoren in Europa hatte und damit auf das Erreichen dieses spezifischen Ziels. Gleichwohl war die Implementierung der Bürgerschaftsfazilität für den Kultur- und Kreativsektor seit 2016 sehr effektiv, wie sich an der vollen Zuteilung der Bürgschaften an Finanzmittler und der Ausschöpfung der verfügbaren Mittel zur Unterstützung der Bürgerschaftsfazilität in 2016 und 2017 zeigt.

Die MEDIA- und Kultur-Vorläuferprogramme haben sich im Hinblick auf ihre Kernoutputs, -ergebnisse und -auswirkungen als wirksam erwiesen. Die Auswirkungen von MEDIA Mundus waren weniger effektiv.

Die Unterprogramme des Programms Kreatives Europa werden ihre beabsichtigten Outputs, Ergebnisse und Auswirkungen wahrscheinlich erreichen. Einige Aspekte der operativen Effizienz der Programme (z.B. Erreichen eines breiteren Publikums, Sicherstellung der geografischen Abdeckung und/oder weitere Steigerung der Auswirkungen auf die Beschäftigung) könnten verbessert werden. Der sektorübergreifende Bereich des Programms Kreatives Europa hat einige seiner Outputs, Ergebnisse und Auswirkungen erbracht, jedoch bedeuten Verzögerungen in der Implementierung der Bürgerschaftsfazilität und Etatunterschreitungen im Bereich der internationalen politischen Kooperationsmaßnahmen, dass die Effizienz der Implementierung verbessert werden kann. Letzteres könnte durch Einrichtung des Performance Monitoring-Rahmens für das derzeitige Programm (im Rahmen dieser Evaluation entwickelt) verbessert werden.

Effizienz der Programme

Die Größe und Reichweite der audiovisuellen und kulturellen Sektoren auf europäischer Ebene und die von dem Programmen abgedeckten geografischen Bereiche sind signifikant. Die Budgets des Programms Kreatives Europa und seiner Vorläuferprogramme waren daher nicht ausreichend, um auf europäischer und/oder sektoraler Ebene eine wesentliche Wirkung zu erzielen. Dies gilt insbesondere für das Vorläufer-Kultur-Programm und dessen Nachfolge-Unterprogramm, die ein größeres Feld an Teilsektoren bedienen müssen. So repräsentierte beispielsweise die Größe des Kultur- und Kreativsektors ca. EUR 560 Mrd. (bzw. 4,5 %) des EU-BIP in 2014 mit 8,5 Millionen Beschäftigten (3,8 % der gesamten Erwerbstätigen in Europa). Im Vergleich dazu

wurden dem Kultur- und Kreativsektor im Zeitraum 2007 bis 2013 durch die drei Vorläuferprogramme EUR 1,1 Mrd. zugeführt. Die reduzierte Anzahl der Teilprogramme unter dem derzeitigen Programm gegenüber den Vorläuferprogrammen ist ein Anzeichen für einen verbesserten Fokus. Ebenso wurde die den Vorläufer-Desks und den „Kreatives-Europa“-Desks (CEDs) zugeteilte finanzielle Unterstützung als äußerst wichtig betrachtet und sollte auf dem derzeitigen Niveau beibehalten werden. Gleichwohl hat die Evaluation Möglichkeiten zur Steigerung der Effizienz festgestellt.

Die Wirtschaftlichkeit der Programme war zufriedenstellend und hat sich von einem Programmzeitraum zum nächsten verbessert. Die Effizienz der meisten betrachteten Programme hat sich verbessert oder ist stabil geblieben, mit einigen wenigen Ausnahmen. Eine Steigerung der Kosten pro Projekt führte üblicherweise zu höheren Outputs und/oder signifikanteren Ergebnissen bzw. Auswirkungen.

Defizite betreffen hauptsächlich die Governance und das Management der Einrichtung der Programme. Die Zusammenführung der Kultur- und Mediaprogramme unter einem umfassenden Rahmen hat die beabsichtigten Vorteile nicht vollständig erzielt. So haben sich beispielsweise erwartete Effizienzen in den Managementkosten des Programms nicht vollständig verwirklicht, da die Anzahl der mit dem Programm Kreatives Europa befassten Vollzeitmitarbeiter gegenüber den Vorläuferprogrammen leicht gestiegen ist. Ähnliche Anstiege gab es auch bei den jährlichen operativen und administrativen Kosten.

Nachhaltigkeit der Programme

Die Nachhaltigkeit der Ergebnisse liegt primär in der Fortführung von Partnerschaften, die unter dem Programm Kreatives Europa und den Vorläuferprogrammen begonnen wurden. Sowohl im Unterprogramm MEDIA, als auch im Unterprogramm Kultur wird die Zusammenarbeit zwischen Projektpartnern in irgendeiner Form über die Projektdauer hinaus fortgesetzt. Im Unterprogramm MEDIA zeigt sich Nachhaltigkeit auch in der Absicht und Fähigkeit von Organisationen, eine europäische Co-Produktion fortzuführen, d.h. ein nachhaltiges Interesse an der Co-Produktion oder dem Vertrieb von Werken mit einer europäischen Dimension. Verglichen mit dem Unterprogramm Kultur haben MEDIA-Projekte jedoch nicht ebenso häufig zu einer Fortsetzung der Zusammenarbeit zwischen Partnern oder anderen Formen der Folgeaktivität geführt. Dieser Unterschied kann teilweise durch den spezifischen Charakter einiger der MEDIA-Programme erklärt werden, die weniger auf eine Entwicklung der Kooperation zwischen Projektpartnern, sondern vielmehr auf den Abschluss eines spezifischen Projektes ausgerichtet sind.

Die Nachhaltigkeit der Auswirkungen ergibt sich ferner aus dem Lernaustausch während der Implementierung von Projekten und der Verbreitung der Ergebnisse dieser Lernerfahrungen. Ein solcher Austausch führt zur Entwicklung neuer Fähigkeiten und Kompetenzen, der sektorweiten Nutzung der Ergebnisse des geförderten Projekts und in der Folge zur Professionalisierung des Sektors sowie zu einer verbesserten Fähigkeit seiner Einrichtungen, international und länderübergreifend zu arbeiten. Dies war in allen Programmen der Fall, insbesondere jedoch im Unterprogramm Kultur und dessen Vorläuferprogramm.

EU-Mehrwert der Programme

Der hauptsächliche EU-Mehrwert ergibt sich aus der starken internationalen Ausrichtung der Programme. Nur wenige andere internationale Förderprogramme unterstützen eine länderübergreifende Kooperation und diese sind signifikant kleiner. Die meisten *unterstützten* Aktivitäten wären in Umfang und Größe ohne die Förderung des Programms Kreatives Europa und dessen Vorläuferprogrammen signifikant geringer gewesen oder wären niemals erfolgt. Die Signifikanz der Förderung für die unterstützten Aktivitäten unterscheidet sich stark unter den Programmen und Teilprogrammen:

- Im Bereich MEDIA sind die meisten unterstützten Aktivitäten typischerweise Teil einer erweiterten Wertschöpfungskette von Entwicklungs- bzw. zu

Vertriebsinhalten. Die Förderung trägt daher nur zu einem oder einigen wenigen Schritten der Wertschöpfungskette bei. Diese Aktivitäten wären ohnehin in irgendeiner Weise implementiert worden, jedoch in einem geringeren Umfang hinsichtlich der geografischen Abdeckung, Qualität der geforderten audiovisuellen Werke oder der Größe des erreichten Publikums. Die MEDIA-Förderung ist darüber hinaus einzigartig in der Vermarktung von (Co-)Produktionen, die das Potenzial haben, ein grenzübergreifendes Publikum anzuziehen.

- Im Unterprogramm Kultur sind die geförderten Aktivitäten weniger eng in bestehende Prozesse eingebunden, obwohl sie grundsätzlich eng mit den allgemeinen Zielen und Aktivitäten der Organisation verbunden sein können. So hat beispielsweise ein Kooperationsprojekt ein neues Modell zur Kompetenzentwicklung in Orchestern auf der Grundlage länderübergreifender Lernerfahrungen produziert, das - obwohl es auf den vorhandenen Aktivitäten teilnehmender Organisationen aufbaut - eine eigenständige Initiative darstellte. Diese Art der Aktivität hätte höchstwahrscheinlich ohne die EU-Förderung nicht stattgefunden.

Elemente des EU-Mehrwerts der Programme sind:

- Die Schaffung internationaler Netzwerke und länderübergreifender Partnerschaften, welche die hauptsächlichen und dauerhaftesten strukturierenden Elemente des ²⁸Programms Kreatives Europa bilden;
- Länderübergreifende Netzwerke erhöhen ferner die Fähigkeit der Einrichtungen des Kultur- und Kreativsektors insgesamt²⁹ und insbesondere jener, die in Nischenbereichen und Mitgliedstaaten tätig sind, in denen solche Fähigkeiten weniger entwickelt sind;
- Die Unterstützung von Organisationen bei der Übernahme (kalkulierter) Risiken, die es ihnen erlauben, sich auf eine Tätigkeit mit einer europäischen Dimension zu fokussieren;
- Der Reputationseffekt für die Begünstigten der Programme, der das potenzielle Interesse von Partnern und Finanzmittlern und deren Vertrauen in die unterstützten Projekte erhöht. Dieser Reputationsaspekt wurde auch im Zusammenhang mit einem erleichterten Zugang zu zusätzlicher Förderung bemerkt.

5 Empfehlungen

Die wesentlichen Empfehlungen aus der Evaluation sind nach den hauptsächlichen Evaluationskriterien strukturiert und befassen sich mit den wesentlichen Chancen und Herausforderungen des Programms, wie im vorigen Abschnitt dargestellt. Ziffer 4 des Berichtes liefert Details zu diesen Empfehlungen.

²⁸ Es ist darauf hinzuweisen, dass es Anzeichen für Strukturierungseffekte über die Zeit gibt, auch wenn diese aufgrund des fragmentierten Sektors schwer erzielt werden können.

²⁹ Die Schaffung dauerhafter internationaler Partnerschaften und Kooperationen war erfolgreich bei der Sicherung einer Wiederholungsförderung, die im Gegenzug den Unternehmen dieser Partnerschaften dabei geholfen hat, zu wachsen und ihre Geschäftsbetriebe auszuweiten.

Relevanz der Programme

- Die Entwicklung von Transmedia-Projekten sollte priorisiert werden, um eine kontinuierliche Relevanz des audiovisuellen Angebotes angesichts sich verändernder Verbrauchsmuster zu gewährleisten;
- Die „Level Playing Field“-Bestimmungen sollten angepasst werden, sodass diese die Dynamiken des audiovisuellen Marktes besser widerspiegeln;
- Der Umfang der Förderung für die europäische Videospielebranche sollte erhöht werden;
- Es sollte sichergestellt werden, dass das Programm für die Entwicklungsbedürfnisse kultureller Einrichtungen relevant ist;
- Die Implementierung der von kulturellen Einrichtungen geführten Projekte sollte flexibler gestaltet werden, um es ihnen zu ermöglichen, sich Veränderungen besser anzupassen;
- Es sollte sichergestellt werden, dass die literarischen Übersetzungsprojekte sprachliche Vielfalt fördern; und
- Die Nutzung sektorübergreifender Projekte sollte verbessert werden.

Interne Kohärenz der Programme

- Maximierung der gegenseitigen Information bezüglich politischer Agenden,
- Entwicklung einer kohärenteren und anpassungsfähigeren Reaktion im Unterprogramm MEDIA auf sich verändernde Technologien und Geschäftsmodelle im audiovisuellen Sektor,
- Sicherstellung ausreichender Klarheit und Bewusstseins bezüglich komplementärer Chancen innerhalb der Unterprogramme und anderer EU-Förderungsquellen,
- Es sollte sichergestellt werden, dass die Kohärenz mit internationalen und nationalen Förderquellen beibehalten wird.

Wirksamkeit der Programme

- Die Gestaltung (d.h. Definitionen, Hierarchie von Zielen, Budgetzuteilung) der derzeitigen und zukünftiger Programme sollte verbessert werden;
- Die Ausrichtung innerhalb des gesamten Programms Kreatives Europa an den Strategien der Sektoren sollte verbessert werden;
- Der Publikumsfokus sollte verstärkt werden,
- Möglichkeiten, die Wirkung sektorübergreifender Maßnahmen zu verbessern, sollten berücksichtigt werden,
- Im Unterprogramm MEDIA sollten die durch positive Diskriminierung induzierten Ungleichgewichte bezüglich der Nationalitäten von Programmförderungsempfängern weiter abgebaut werden, und
- Die Monitoring-Maßnahmen des Programms und das damit verbundene Reporting sollten schnellstmöglich implementiert werden, und das Rahmenprogramm sollte auf sich verändernde Märkte und politische Prioritäten abgestimmt werden.

Effizienz der Programme

- Budgetzuteilungen sollten an den effizientesten Maßnahmen ausgerichtet werden;
- Die Bewerbungsverfahren sollten verbessert werden, ebenso die Funktion der CEDs.

Nachhaltigkeit der Programme

- Die Mechanismen zur Verbreitung der Ergebnisse geförderter Projekte sollten gestärkt werden, um die Nachhaltigkeit ihrer Auswirkungen zu verbessern;
- Es sollte eine Strategie zur Verbesserung der Verwertung der geförderten Outputs entwickelt werden.

EU-Mehrwert der Programme

- Kapitalisierung der durch geförderte Projekte entwickelten Partnerschaften und Netzwerke, die ein Kernelement des EU-Mehrwerts darstellen.

Kurzdarstellung

Die Zwischenevaluation des Programms Kreatives Europa sowie die Ex-Post-Evaluation der drei Vorläuferprogramme: Kultur, MEDIA 2007 und MEDIA Mundus beurteilt deren Relevanz, Kohärenz, Wirksamkeit, Effizienz, Nachhaltigkeit und EU-Mehrwert sowie die langfristigen Ergebnisse und Auswirkungen von Vorläuferprogrammen. Sie berücksichtigt den Kontext der Implementierung der Programme, betrachtet darüber hinaus deren Beitrag zu einem intelligenten, nachhaltigen und integrativem Wachstum - den neuen Prioritäten der Kommission - einschließlich der Strategie des digitalen Binnenmarktes und der europäischen Kulturagenda. Im Ergebnis waren die Programme relevant für die derzeit mit der Globalisierung und Digitalisierung verbundenen aufkommenden Bedürfnisse der Kreativ- und Kultursektoren; sind im Wesentlichen intern kohärent; sind extern kohärent mit der Politik der Mitgliedstaaten, den Interventionen der EU und anderen internationalen Interventionen; sind wirksam und effizient in der Generierung ihrer erwarteten Ergebnisse; erzeugen gewisse nachhaltige Auswirkungen und liefern einen signifikanten EU-Mehrwert, hauptsächlich durch die Förderung einer länderübergreifenden Kooperation in dem Sektor. Die Empfehlungen dienen der verbesserten Gestaltung des derzeitigen und zukünftigen Programms, der Anpassung an zukünftige Herausforderungen, der Kommunikation anderer verfügbarer Förderungsquellen, der Ausrichtung der Budgetzuteilungen an den effizientesten Maßnahmen, der Stärkung der Verbreitung von Projektergebnissen und der Kapitalisierung der durch die geförderten Projekte entwickelten Partnerschaften und Netzwerke.

Zusammenfassende Feststellung

- Die Gestaltung des Programms Kreatives Europa leidet unter einer unklaren Definition und Hierarchie seiner Ziele, der gewünschten Auswirkung der Bestimmungen zur Wettbewerbsfähigkeit und ganzheitlichen Verbindung mit den EU-Strategien. Auf dieser Grundlage wird empfohlen, die Anzahl der Ziele zu reduzieren, eindeutige Ziele zu etablieren, die für den gesamten Kultur- und Kreativsektor und die EU-Strategien relevant sind, sowie eine Definition der Wettbewerbsbedingungen und des EU-Mehrwerts des Programms vorzugeben.
- Die Messung der Performance des Programms und die Monitoring-Verfahren auf Programmebene sind derzeit sehr begrenzt. Es wird empfohlen, die Monitoring-Maßnahmen des Programms und das damit verbundene Reporting schnellstmöglich zu implementieren und den Rahmen auf sich verändernde Märkte und politische Prioritäten abzustimmen.
- Die Zusammenführung der Kultur- und Mediaprogramme unter einem umfassenden Rahmen hat nicht vollständig zu einer erhöhten Effizienz im Programmmanagement geführt. Es wird empfohlen, die Verfahren des Programmmanagements einheitlich auszurichten und die Häufigkeit governancebezogener Aktivitäten zur Lenkung des Programms zu erhöhen.
- Das Programm kann neuen und aufkommenden Bedürfnissen des Kultur- und Kreativsektors nicht ausreichend begegnen. Daher wird empfohlen, Bereiche, in denen das Programm seinen EU-Mehrwert weiterhin beibehalten kann, frühzeitig zu identifizieren und zu unterstützen.
- Das Programm Kreatives Europa könnte im Hinblick auf die Prioritäten der Publikumsentwicklung beider Unterprogramme wirksamer sein. Es wird empfohlen, die Durchführung der Maßnahmen der Unterprogramme des Programms Kreatives Europa im Hinblick auf eine finanzielle Unterstützung kreativer und kultureller Teilsektoren (Angebotsorientierung) und eine Unterstützung der simulierten Nachfrage nach europäischen auswärtigen kulturellen und kreativen Werken (Nachfrageseite) auszubalancieren.
- Den Programmbegünstigten fehlt es an Zugang zu Finanzierung und Kenntnis anderer EU-Förderprogramme für ihren Sektor. Es wird empfohlen, (1) auf die Kommunikationsmaßnahmen des Programms zu vertrauen, um das Bewusstsein für weitere verfügbare Förderungen aus anderen EU-Förderprogrammen zu erhöhen, (2) die Programmförderung anderer Interventionen auf allen Governance-Ebenen mit dem Programm Kreatives Europa abzustimmen und (3) die Implementierung der Bürgerschaftsfazilität fortzuführen.
- Sektorübergreifende Synergien innerhalb der Aktivitäten des Programms werden nicht systematisch genutzt. Daher wird empfohlen, den Dialog zwischen den Angeboten sowie die strategische und operative Planung zwischen den für das Programm zuständigen Generaldirektoraten zu verbessern und die Verbindungen zwischen den durch das Programm geförderten Aktivitäten und allen seinen spezifischen Zielen zu stärken. Darüber hinaus könnte auch eine Erhöhung des Umfangs der Aktivitäten im Teilbereich der länderübergreifenden politischen Kooperation des sektorübergreifenden Bereiches dazu beitragen, das Bewusstsein für die Programmresultate und die durch das Programm Kreatives Europa geschaffenen potenziellen Synergien und Kooperationsmöglichkeiten zu erhöhen.
- Die Höhe der finanziellen Förderung ist eventuell für einige kleinere Einrichtungen des Sektors und in den Gebieten der Mitgliedstaaten unzureichend. Es wird empfohlen, die Budgetzuteilungen an den effizientesten Maßnahmen sowie an Maßnahmen mit dem

höchsten EU-Mehrwert auszurichten, d.h. eine Vergrößerung der Einrichtungen zu fördern, die Vorteile internationaler Co-Produktionen und Lernerfahrungen zu kapitalisieren, wobei einige Maßnahmen den Schwerpunkt auf kulturelle Vielfalt und andere auf die Förderung der Wettbewerbsfähigkeit des Kultur- und Kreativsektors legen sollten.

- Der hauptsächliche Mehrwert des Programms Kreatives Europa und dessen Vorläuferprogrammen ergibt sich aus der starken internationalen Ausrichtung der Programme, wobei nur wenige weitere vergleichbare Programme in Europa vorhanden sind. Es wird daher empfohlen, die durch geförderte Projekte entwickelten Partnerschaften und Netzwerke zu kapitalisieren.

1 Introduction

This Final Report is the fourth deliverable of the Interim evaluation of the Creative Europe Programme and ex-post evaluation of the Culture, MEDIA 2007 and MEDIA Mundus programmes, an assignment being undertaken by ICF Consulting Services Limited (ICF) and its partners BOP Consulting and Technopolis, on behalf of the Directorate General Education and Culture of the European Commission (DG EAC).

In line with the methodology agreed with the Inception report, this Final Report builds on the findings of:

- the relevant programmes' applications and contextual data;
- the interviews with key informants of the study;
- the MEDIA and Culture surveys;
- the six focused evaluations (FEs); and
- the findings of the open public consultation (OPC).

The findings and recommendations of this report are organised around the evaluation criteria and questions defined by the Tender Specifications.

This report is structured as follows:

- The remainder of Section 1 offers sectors' definitions, outlines programmes' and policy context and presents the programmes under evaluation.
- Section 2 presents the method statement, including an overview of the data collection tasks completed, the strengths and limitations of the method.
- Section 3 presents the findings of the study, based on the triangulation of data from the data collection exercises, including the findings of the OPC.
- Section 4 proposes recommendations per evaluation criteria based on the findings of this evaluation.

It is accompanied by four annexes:

- Annex 1: Intervention logics of Creative Europe and its predecessor programmes;
- Annex 2: Detailed presentation of the outputs, results and impacts of selected MEDIA and Culture schemes;
- Annex 3: Detailed presentation of the efficiency assessment of selected MEDIA and Culture schemes; and
- Annex 4: List of key informant interviews undertaken.

1.1 Definition of cultural and creative sectors

The definition of the 'cultural and creative sectors' (CCS) used as a basis for this evaluation is set out in the Regulation establishing the Creative Europe Programme³⁰ as follows³¹:

- All sectors whose activities are based on cultural values and/or artistic and other creative expressions, whether those activities are market- or non-market-oriented, whatever the type of structure that carries them out, and irrespective of how that structure is financed.

³⁰ Regulation (EU) No 1295/2013 of the European Parliament and of the Council: Establishing the Creative Europe Programme (2014 to 2020) <http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32013R1295&from=EN>

³¹ Note that defining and measuring the cultural and creative sectors has long been a challenge, constrained by a lack of comprehensive data. Particular challenges include cross-country comparisons (due to widely differing sector footprints) as well as accounting for changing business models and types of enterprise.

- Activities including the development, creation, production, dissemination and preservation of goods and services which embody cultural, artistic or other creative expressions; and related functions (e.g. education, management).
- Sub-sectors including inter alia architecture, archives, libraries and museums, artistic crafts, audiovisual (including film, television, video games and multimedia), tangible and intangible cultural heritage, design, festivals, music, literature, performing arts, publishing, radio and visual arts.

Following the structure of the Creative Europe MEDIA and Culture Sub-programmes, this evaluation and the following report divides the CCS into audiovisual and culture sectors, each including the individual sub-sectors as outlined above.

For analysis purposes, the following categorisation of Culture sub-sectors was used for the purposes of this study: Visual arts; Cultural heritage; Design and applied arts and architecture; Literature, books and reading; Performing arts: music and opera; Performing arts: theatre, street arts, circus arts and puppetry; and Performing arts: dance.

1.2 Overarching context of the CCS

Despite the economic crisis the creative and cultural sectors have grown steadily over the evaluation period (2007-2016). The combined Gross Value Added (GVA – a measure of economic productivity) of the cultural and AV sectors increased from €163,500 million to €178,000 million between 2007 and 2014 (EU28), an increase of 9 percent.³² Over roughly the same period, the number of workers in cultural employment grew from 5.4 million in 2008 to 6.4 million in 2015 (EU28)³³ – with the sectors thus increasingly representing a major source of employment.³⁴ The sectors are characterised by a high level of fluidity and self-employment, so these statistics are likely to underestimate overall employment in the sectors.³⁵

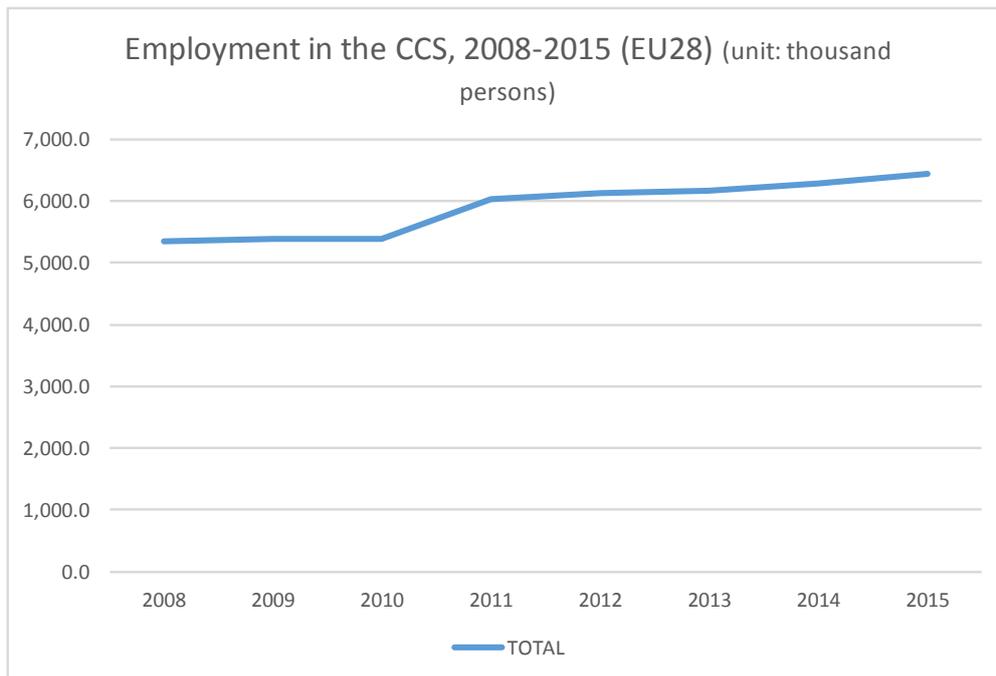
³² Eurostat data that best matches the evaluation period (2007-2016, as specified in Section 2.2). GVA for the cultural sector grew from €96,479 million in 2007 to €108,096 million in 2014 (note that this includes: creative, arts and entertainment activities; libraries, archives, museums and other cultural activities; and gambling and betting). GVA for the AV sector grew from €67,015 million to €69,823 million in the same period (including: motion picture, video, TV programme production, programming and broadcasting activities).

³³ Eurostat data – employment data only available from 2008 onwards. Jobs in motion picture/ TV programme production (and related activities) increased by 6 percent; those in creative arts and entertainment by 7 percent. Highest in Luxembourg (5.2 percent), Sweden (4.1 percent), Finland (3.9 percent), Netherlands (3.9 percent), and Denmark (3.8 percent). (Eurostat (2015) *Cultural employment by NACE Rev. 2 activity* [cult_emp_n2]. Last update: 07-11-2016.)

³⁴ Stumpo and Manchin (2015) *The resilience of employment in the Culture and Creative Sectors (CCSs) during the crisis, prepared for the European Expert Network on Culture*. See also Eurostat (2016) *Cultural Statistics: 2016 edition* for a similar analysis of employment in the cultural sector post 2008.

³⁵ The sector includes many potential workers (e.g. between contracts or temporarily active in other sectors) and self-employed. Idea Consulting estimated that, in 2009, in EU27, 520,500 self-employed persons work in the 'creative, arts and entertainment activities' (section 90-92). (Creative Skills Europe (2016) *Trends and skills in the European audiovisual and live performance sectors, for the European Skills Council for employment and training in the Audiovisual and Live Performance sectors* & Idea Consulting (2013) *Survey on access to finance for cultural and creative sectors*).

Figure 1. Employment in the CCS, 2008-2015 (EU28)



With this growth, the CCS are recognised as having shown ‘a certain degree of resilience during the years of the economic crisis’. This growth has been fuelled by a consistent increase in consumer spend on cultural products across the European Union and beyond.³⁶

1.2.1 A fragmented market being reshaped by digital technologies

The CCS sub-sectors are characterised by their culturally fragmented markets, the impact of digital technologies and changing consumer behaviours. Three key characteristics have shaped the context for the CCS.

First, the European CCS market is highly fragmented.³⁷ This fragmentation is in part cultural; many CCS products (such as films, books, artworks, or plays) are made for and sold to specific cultural contexts, which may be defined by national or linguistic boundaries. For example, a play or film may need to be translated to reach new markets. Furthermore, transnational business operations across this fragmented market result in financial, administrative, or regulatory difficulties.³⁸

Second, the digital shift is dramatically changing the way content is produced, distributed, and consumed. It provides new mechanisms for production; lowers the cost of distribution; enables new types of connections between audiences and creative and cultural players; detaches consumption from location; and gives control to audiences over their selection of what to watch or listen to.³⁹ Hence, this has changed consumer

³⁶ PwC / Strategy & Business (2016) Special Report: Global Entertainment and Media Outlook 2016–2020

³⁷ ECORYS (2010) *Interim Evaluation of the Culture Programme 2007-13* p14; European Commission (2011) *Impact Assessment, Accompanying the document Regulation of the European Parliament and of the Council establishing a Creative Europe Framework Programme* (SEC(2011) 1399 final)

³⁸ Utrecht School of the Arts (2010) *The Entrepreneurial Dimension of the Cultural and Creative Industries*; ECORYS (2010) *Interim Evaluation of the Culture Programme 2007-13* p14; European Commission (2011) *Impact Assessment, Accompanying the document Regulation of the European Parliament and of the Council establishing a Creative Europe Framework Programme* (SEC(2011) 1399 final).

³⁹ See e.g. BOP Consulting for Crafts Council (2012) *Craft in an Age of Change*; Nesta (2013) *Digital broadcast of theatre: Learning from the pilot season*; ESSnet-CULTURE (2012) *Final Report* (p.398; 400-401; 405-406).

behaviour, as well as raising concerns about piracy and challenging existing business models in the CCS.⁴⁰ The combined effect is leading to a significant increase in online cultural participation⁴¹ and opportunities for existing and new CCS players to enter the digital space.⁴²

Third, this digital technology has also increased global access to cultural goods and, as a corollary, has opened up new international markets for European producers, 'enabling [them] to capture a share in the emerging markets for the products and services of the future'.⁴³ However, the fragmentation and thus small size of European cultural markets impairs their capacity to promote themselves internationally.⁴⁴ At the same time, global access has led to an increase in international competition through increased platform consolidation, with a few large companies dominating global sales of cultural goods (especially in the AV sector). First mover advantage and benefits of scale for such platforms may present further challenges to cultural and linguistic diversity, by limiting small independent players' access to the international market.⁴⁵

The impact of these characteristics for the audiovisual (AV) and the culture sector are detailed below.

1.2.2 The context specific to the audiovisual sector

Overall, watching TV or going to the cinema remain hugely popular pastimes in the EU. Watching or listening to a cultural programme on TV remains the most frequently mentioned cultural activity in the EU, while cinema attendance remains among the most popular 'out-of-doors' activities.⁴⁶

1.2.2.1 The European AV sector is dominated by a few Member States

Overall, the structure of the AV sector in the EU is highly fragmented. AV enterprises tend to be small – with an average of 2.3 employees in motion picture, video, and television production enterprises; and 1.9 employees in post-production enterprises.⁴⁷

The European AV sector is dominated by the sectors of a small number of high production capacity countries (PCCs). For example, in 2013, around 50 percent of TV programming and broadcasting enterprises were operating from five high production countries⁴⁸; similarly, the United Kingdom, France and Germany accounted for 64 percent of the revenues of the rapidly expanding video-on-demand (VOD) market.⁴⁹

⁴⁰ Booz & Company for Creative England (2013). *The Digital Future of Creative U.K: The Economic Impact of Digitization and the Internet on the Creative Sector in the U.K. and Europe*

⁴¹ Over half of Europeans now use the internet for cultural purposes (56 percent; 30 percent at least once a week). A minority use it to create their own cultural content. (Special Eurobarometer 399 (2013). *Cultural Access and Participation – SUMMARY* (pp.9-10))

⁴² As ESSnet points out, technological innovations have stimulated the production of information among e.g. heritage institutions (p.404). Substantial industry data shows how spending on digital products has led to recent increases in demand for these products. (PwC (2012). *Global Media Outlook*)

⁴³ Directorate-General (DG) for Internal Market, Industry, Entrepreneurship and SMEs, Digital transformation (https://ec.europa.eu/growth/industry/digital-transformation_en, accessed May 2017)

⁴⁴ See e.g. European Commission, DG Education & Culture (2010) *Information Note on the Public Consultation on a Future European Union Culture Programme*

⁴⁵ Further impacted by the costs of developing on-line platforms, and the preference of ICT providers to negotiate with a limited number of large companies. Particularly relevant in the audiovisual and music sectors. (EAO (2015) *Yearbook*; European Commission. (2011). p.17)

⁴⁶ TV/Radio: for 72 percent, 'at least once in the last year'. However, it is registering the steepest decline among all activities between 2007 and 2013 (from 78 percent to 72 percent). Cinema: 52 percent. This was the only activity that recorded a small increase of 1 percent between 2007 and 2013. Special Eurobarometer 399. (2013).

⁴⁷ Eurostat, *Annual Detailed Enterprise Statistics for Services*, accessed 27 June 2016.

⁴⁸ Eurostat data shows that in 2013, there were 130,000 enterprises operating in motion picture, video, and TV programme production, sound recording and music publishing, registering a growth of 16 percent since 2011. 52 percent of these

A1.1.1.1 European film distribution is hindered by a lack of relevant funding and the strong competition from vertically integrated US conglomerates

There was some growth in public film funding in Europe between 2010 and 2014, to €2.45 billion. Despite this, overall there has been a decrease in available financing for films in Europe, suggesting that other funding sources, such as broadcaster investment, pre-sales or fiscal incentives, are decreasing.⁵⁰ Generally, this has resulted in smaller budgets, rather than fewer films being produced. Indeed, there has been a considerable increase in the production of films in Europe between 2011 and 2015 (1,547 to 1,643), including both fiction (1,096 to 1,127) and feature documentaries (451 to 516).⁵¹

However, this increase is not reflected in film and AV market revenue figures⁵² or viewing/ admission figures, the latter of which highlight the dominance of the US film market in Europe. In the EU, as in most global markets, US-controlled conglomerates hold significant market power in the production and distribution steps of the value chain: *'What makes these majors so powerful is the fact that they are vertically integrated with activities spanning production and distribution, thus controlling the most important components of the global audiovisual industry'*.⁵³

In contrast to the dominance of these conglomerates, European enterprises – particularly those producing or distributing independent films – are only able to capture a slice of the value chain. With such control over distribution, the US majors can commit significant resources to production and marketing⁵⁴, build audience awareness, reduce and/or spread risks over several films, and reinvest profits in new projects.⁵⁵

For independent films, the small slice of the value chain available is further diminished by the difficulty in securing enough resources to aggressively market their product. This means that these films are worth less to exhibitors, irrespective of the quality of the films themselves, and so are less likely to be shown. Further exacerbating this, a 2014 communication from the European Commission highlighted an imbalance between production, distribution and consumption in the European film sector – reflected in a lack of film policies supporting distribution. It found that while there are *'substantially more European than US and Canadian productions, European films are distributed on a smaller scale and have difficulties to reach a wider audience in non-domestic markets, including*

enterprises were based in the five high production capacity countries (Germany, France, the UK, Spain and Italy). European Audiovisual Observatory, press release 5-April-2016

⁴⁹ 52 percent of these enterprises were in France, Germany, Italy, Spain, United Kingdom, and research has suggested that these industries tend to cluster geographically. (Caroline Chapain, Phil Cooke, Lisa De Propriis, Stewart MacNeil, and Juan Mateos-Garcia, *Creative Clusters and Innovation: Putting Creativity on the Map* (Nesta 2010).) See also: EAO, *The development of the European market for on-demand audiovisual services*, March 2015

⁵⁰ The decrease in available financing is based on a sample of five countries, Portugal, Spain, France, Italy and the Netherlands. Overall, the EAO's identification of the financing structure of a 'typical European film' highlights the importance of public funding: 40-60 percent direct public funding; 10-20 percent broadcaster investments; 5-15 percent pre-sales; 10 percent fiscal incentives; 10 percent producer's equity; and an unknown amount of funding from other sources.

⁵¹ EAO (2016) *Background on the AF and film sector*. Note these figures are provisional.

⁵² Only provided as cumulative figure. While in nominal terms revenue has increased from €102 - €106 billion between 2010 and 2014, in real terms revenue has decreased from 102 to 98 bn Euro over the same period. (EAO (2016) *Background on the AF and film sector*).

⁵³ Ivana Katsarova (2014) *European Parliamentary Research Service, 'Briefing: An Overview of Europe's Film Industry'*, pp. 545,705.

⁵⁴ E.g. via strategies of control that help manage this "risk-ridden environment", such as "formatting strategies", which include the star system (i.e. the selection and creation of film stars), as well as the use of genres and film sequels (Joint Research Centre of the European Commission (2012). *Statistical, Ecosystems and Competitiveness Analysis of the Media and Content Industries: The Film Sector*, p.26; Katsarova (2014)).

⁵⁵ Katsarova (2014)

within the EU'. A recent EAO study also found that European films get less promotional space than US films on TVOD landing pages.⁵⁶

As a result, this imbalance is reflected in the comparative distribution and consumption statistics of American versus European films, both in cinema and on TV. In 2012, US productions captured 65 percent of admissions in the EU; while admissions to non-national EU films on the EU market lay at 12 percent.⁵⁷ More recent data from the EAO highlights a renewed strength of US blockbusters in 2015, following a reduction in the previous two years, while admissions for EU films dropped again after a small peak (since 2011) in 2014, both in terms of national and non-national admissions.⁵⁸ Overall, the market share of European films dropped from 34 percent to 26 percent between 2014 and 2015 alone.⁵⁹

There have been some successes, such as in exports of European films. 45 percent of European films are released outside their domestic market (including 20 percent outside Europe), and European films selling over 40 percent of their total admissions abroad (with almost half of this outside Europe). The US is the largest market for European films (accounting for 35 million non-national admissions), followed by Canada (15 million). However, few European films become major hits internationally – of around 1 500 films produced per year, an average of only 26 sell more than 1 million tickets abroad.⁶⁰

Lastly, the dominance of US product is also reflected in distribution figures for European TV, where an average of only 30 percent of fiction content tends to be European, with public channels scheduling more European content than private channels. Online meanwhile, less than 50 percent of European films released in cinemas are available online, while 87 percent of US films are.⁶¹

1.2.2.2 Opportunities come from new ways of engaging with audiences through digital technology

Despite considerable fluctuations, cinema attendance in the EU in 2015 was at its highest since 2006, reaching 976.5 million. Growth in audiences were recorded in almost all member states (an increase of 7.4 percent since 2005).⁶² Together with an increase in average ticket prices, this has resulted in an even higher growth of box office revenues (14 percent) from 2005 to 2015.⁶³

Alongside these encouraging figures, further future growth in the sector is likely to be supported by digital technology.⁶⁴ To date, the adoption of digital technology has been

⁵⁶ Based on samples in Germany, France and the UK (EAO, Background on the AF and film sector, July 2016. Note that these numbers are provisional.)

⁵⁷ European Commission (2014). *European film in the digital era. Bridging cultural diversity and competitiveness*. p.1-7 The report argued that European film policies on support to production are not matched with supporting distribution; the proportion of funding going to distribution as opposed to creation was particularly small among national (7.4 percent for distribution, 70.4 percent for creation) and sub-national funds (3.5 percent for distribution, 70.4 percent for creation).

⁵⁸ National admissions (i.e. in the film's own country) dropped from 213m in 2011 to 170m in 2015 after a peak of 221m in 2014; non-national admissions increased from 62m in 2011 to 99m in 2012, but then dropped again to 85m in 2015.

⁵⁹ EAO (2016) *Background on the AF and film sector*, p.19. Note these figures are provisional

⁶⁰ EAO (2016) *Background on the AF and film sector*

⁶¹ EAO (2016) *Background on the AF and film sector*, pp 40, 42

⁶² At the same time, the number of cinema screens (digital + non-digital) has remained relatively stable. Across all member states, the total number of screens increased from 29,663 to 30,018 from 2005 to 2015 (+1 percent). This figure however hides considerably variations in growth across the member states, with Portugal experiencing the highest growth of 183 percent from 120 to 339; and Hungary seeing the biggest decrease of -27 percent from 485 to 354. Overall, France, Germany, Italy, Spain and the UK have the highest number of screens (UNESCO Institute for Statistics (2017), <http://data.uis.UNESCO.org/>)

⁶³ Following its lowest recorded numbers since 2006 in 2013, of 904.5 million. (EAO (2016) *Background on the AF and film sector*) Note that these figures are provisional.

⁶⁴ This point is made by a number of industry commentators. For example, PWC (2015) *The digital future of creative Europe*

remarkable, both outside and inside the home: the number of European cinema screens grew by 1.6 percent to 37,335 in 2014, with around 93 percent of European cinema screens now digital. In the home, nearly 100 percent of households have digital TV, while new sectors such as VOD are 100 percent digital.⁶⁵

These technologies have changed consumption patterns for both film and TV, resulting in extraordinary growth rates.⁶⁶ VOD services allow audiences to personalise, save, circulate and transport AV content (film & TV) as they choose, and have reduced geographical distances as well as those between different media platforms. At present, films get released in slightly fewer countries in VOD than in cinemas, both in terms of EU and US films; and VOD revenues in 2015 still represented only 3 percent of total revenues in the EU AV market.⁶⁷ However, rising revenue figures indicate the significant appeal for audiences of this new way of consumption. Total pay on-demand revenues in the EU increased by 52 percent from 2014 to 2015, with a compound annual growth rates (CAGR) of 45 percent between 2011 and 2015 (from around €6 million to almost € 3,000 million). Growth was particularly significant for subscription video-on-demand (SVOD) revenues, which experienced a CAGR of 161 percent between 2011 and 2015 (from less than €100 million to around €1,600 million).⁶⁸

Younger audience groups use VOD more than older groups, and in a different way.⁶⁹ For example, behaviour online watching video is relatively similar to the general population, but young viewers use platforms like Facebook more frequently, and these platforms are becoming a key provider of online video content.⁷⁰

These developments are providing new revenue sources, albeit with significant variations across Member States.⁷¹ This includes advertising revenue, with studies predicting an increase in advertising revenue from online compared to TV (though again, the US market is seen as leading the way).⁷² The digital shift has lowered entry costs for distributors, resulting in a significant growth in the number of TV channels available on VOD.⁷³ VOD distribution on the 'open Internet'⁷⁴ has become increasingly accessible (if

⁶⁵ European Audiovisual Observatory (2015) *Trends in Video-on-Demand Revenues*

⁶⁶ According to 2013 research, they are also changing marketing requirement: while for TV, prior knowledge and scheduling are important to choosing a film, with VOD the ability to search by genre and having previously heard of films is more important. Young adults aged 16-25 appear the most sensitive to film advertising across all platforms (European Commission, 2013, *A profile of current and future audiovisual audiences*)

⁶⁷ The largest proportion of revenues came from TV and radio advertising (32 percent), pay-TV revenues (31 percent), and public funding (23 percent). Of all revenue from linear and on-demand pay-revenues, 92 percent came from pay-TV. (EAO (2017). *VOD distribution and the role of aggregators*)

⁶⁸ EAO (2017). *VOD distribution and the role of aggregators* p.12-14

⁶⁹ It is worth noting that the report also found that children and young people go to the cinema more often and watch more films on home video, so it cannot be said with certainty how far their higher usage of VOD compared to adults may be due to changing viewing habits within the population compared to generally higher film consumption levels among younger people compared to adults. (European Commission (2013) *A profile of current and future audiovisual audiences*, p.12-14)

⁷⁰ EAO (2015) *On-demand Audiovisual Markets in the European Union*, p.25

⁷¹ In 2010 to 2014, the UK accounted for 34 percent of VOD revenue, France for 18 percent, and Germany for 12 percent. (Croce and Grece (2015) *Trends in Video-on-Demand Revenues*, 6.)

⁷² IAB Europe in 2016 found that European online advertising more generally grew 13.1 percent to a market value of €36.4 billion in 2015 compared to the €33.3 billion European TV market. More specifically, PWC predicted that global online TV advertising is seeing a 20 percent CAGR compared to a global total TV advertising revenue CAGR of only 4.1 percent in 2019. While the report predicted a CAGR of 5.1 percent and 2.8 percent for global multichannel and terrestrial advertising, global online TV advertising revenue is predicted to see a 19.9 percent growth. The authors suggest that 'as viewing continues to move away from traditional networks towards digital alternatives, so advertisers will consider changing where they allocate their expenditure to reach desired demographic segments'. The report also highlighted the US's ongoing global revenue leadership in TV advertising. (PWC (?) *TV advertising. Key insights at a glance* & IAB Europe (2016) *European Online Advertising surpasses TV to record annual spend of €36.4bn*)

⁷³ Between 2009 and 2015, the number of new television channels grew by 49 percent. (European Audiovisual Observatory (2015) *Trends in Video-on-Demand Revenues*)

⁷⁴ I.e. net neutrality, where internet service providers enable access to all content and applications regardless of the source, i.e. without favouring or blocking particular products or websites. EU rules on net neutrality (open internet) were adopted under

not necessarily profitable) for producers themselves as part of a trend in bypassing intermediaries. The roll-out of broadband networks and the availability of smart TVs similarly present new opportunities for audiovisual service editors to follow a 'self-distribution' model.⁷⁵

However, despite these opportunities, recent data shows the US film market also dominates in this new mode of provision. Growth rates may be, in part, a result of the entry of major new US-based companies. The market for SVOD in the EU has been stimulated since 2012 by the entry of Netflix into national markets, as well as by both demand and supply-side reaction.⁷⁶ In 2015, the EU captured a market share of only around 2 percent of both unique and cumulated titles on TVOD, while the US made up 41 and 59 percent respectively.⁷⁷

Lastly, the rise of VOD and SVOD are also providing new opportunities for the online distribution of cinema films specifically, though with a more visible impact on mainstream rather than on arthouse films, where online business models remain challenging.⁷⁸ EU co-productions also typically do better with online distribution than purely national films.⁷⁹ However, at present, non-purely national EU films⁸⁰ released in EU cinemas again achieve significantly lower presence on VOD services than US films across EU Member States⁸¹, again implying that consumption of EU cinema films via VOD lags behind that of US content.

1.2.3 The context specific to the Culture sectors

1.2.3.1 The culture sector's fragmentation is one of many characteristics making access to finance challenging

As with the AV sector, the culture sector in the European Union suffers from intense cultural⁸² and market fragmentation, resulting from small and specific cultural contexts (e.g. national or linguistic) and leading to challenges in undertaking transnational operations or reaching out to larger non-national EU markets.⁸³

Regulation (EU 2015/2120) in November 2015 under the Digital Single Market, "creating the individual and enforceable right for end-users to access and distribute internet content and services of their choice" and "ensuring that the same provisions apply across Europe" (<http://ec.europa.eu/digital-single-market/en/open-internet-net-neutrality>)

⁷⁵ Partly due to reduced barriers to establishing new operations due to technological developments, e.g. the number of TV channels in the EU grew 49 percent between 2009 and 2015. (European Audiovisual Observatory. (2016). MAVISE Database) See also EAO (2016). *On-demand services and the material scope of the AVMSD.*)

⁷⁶ Demand-side reactions were stimulated by marketing spend which raised awareness of the SVoD services. Supply-side reactions included the launch of new SVoD services by established audiovisual players in response (Christian Grece for EAO (2015) *The SVOD Market In The EU Developments 2014/2015*)

⁷⁷ EAO (2016) *Background on the AF and film sector*

⁷⁸ EAO (2015) *On-Demand Audiovisual Markets*, p.38-39

⁷⁹ Grece, for the EAO (2016), *How Do Films Circulate on VOD Services and in Cinemas in the European Union? A Comparative Analysis*, p.16).

⁸⁰ i.e. co-productions including stakeholders from more than one EU member state

⁸¹ Between 2005 and 2014, 47 percent of EU films released in EU cinemas were available on at least one VOD service. In comparison, 87 percent of US films released during the same period were available on at least one VOD service. On average for all films released on VOD, EU films were available in 2.8 countries. In comparison, US films were available in 6.8 countries. (Grece, *Comparative Analysis*, p.11 and 23).

⁸² See section 1.2.1. Many CCS products (e.g. films, books, artworks, or plays) are made for and sold to specific contexts, which may be defined by national or linguistic boundaries.

⁸³ ECORYS (2010) *Interim Evaluation of the Culture Programme 2007-13*, p.14; European Commission (2011) *Impact Assessment, Accompanying the document Regulation of the European Parliament and of the Council establishing a Creative Europe Framework Programme* (SEC (2011) 1399 final)

Even within the cultural sectors, there is a significant variation in their size, business models, and support requirements.⁸⁴ For example, each of the sub-sectors have different business models. Cultural heritage is frequently reliant on public funding (as they are public goods) although there is strong pressure to earn income or support local economies, such as by attracting tourists.⁸⁵ In contrast, organisations operating in design and applied arts and architecture will typically earn income directly through fees provided for services and receive relatively little state support.⁸⁶

There is also significant diversity in the relationship to audiences. Performing arts: Music and opera audiences will typically include performances in a fixed venue e.g. an opera house. Performing arts: theatre, street arts, circus arts, and puppetry, may have a greater focus on work in public spaces e.g. an open festival. Within these relationships there is also a huge variety; visual arts audiences may engage in a gallery or online or both, using digital to supplement the gallery experience.

These sectors are rarely represented by a single horizontal interest organization but there is typically a plentiful of sub-sector specific interest organizations, some of which compete: culture has no single voice.⁸⁷

In addition, the cultural sector is fragmented in that it is dominated by very small enterprises: according to Eurostat's 2016 Cultural Statistics, in 2013 micro enterprises employing less than 10 persons represented 94 percent of all firms in the wider cultural sector.⁸⁸ This was equally true when looking at specific sub-sectors such as music publishing or recording, and design activities; where the vast majority of enterprises are SMEs, which in turn also employ the majority of people employed in the sub-sector (see Table 1⁸⁹). Such small or medium-sized enterprises generally tend to face more challenges than large organisations in attracting external finance. This is further exacerbated by characteristics that are specific to the cultural sector, such as the lack of tangible assets, the (perceived) lack of business skills, and other specific market conditions (e.g. size of the market, lack of market intelligence).⁹⁰

In part, this means that there is a heavy reliance on public subsidy within the sector⁹¹, at a time when national funds for the cultural sectors have significantly fallen since the economic crisis in 2008. As ECORYS concluded, cultural activities may be seen '*as more expendable in such circumstances than activities that have a more direct effect on economic circumstances*'.⁹²

Such reductions in public funding have likely resulted in new challenges for cultural organisations. Combined with barriers to access to finance, which make it challenging to

⁸⁴ The cultural subsectors defined for this evaluation are: Visual arts; Cultural heritage; Design and applied arts and architecture; Performing arts: Music and opera; Performing arts: theatre, street arts, circus arts, and puppetry; Performing arts: dance; Literature, books, and reading.

⁸⁵ CHCfE Consortium (2015) Cultural Heritage Counts for Europe

⁸⁶ For example, see: <http://designforeurope.eu/news-opinion/eu-survey-shows-strategic-use-design-linked-increased-innovation-and-productivity>

⁸⁷ Heleste, Kupi, and Kosonen for the Northern Dimension Partnership on Culture (2015) Trends and Challenges in Cultural and Creative Industry Policy Development within the Northern Dimension Area

⁸⁸ Idea Consulting (2013). *Survey on Access to Finance for the Cultural and Creative Sectors*, p.6. According to Eurostat statistics on cultural enterprises (article updated March 2017), in all member states except Lithuania, cultural enterprises tend to be smaller than in other sectors of activity; and the prominence of SMEs as a percentage of all enterprises exceeded 99 percent in most countries except Germany. (Eurostat (2016) *Cultural Statistics: 2016 edition*. p.84-85).

⁸⁹ Note that Eurostat only provides information on these sub-sectors, bundled together as presented in the table based on existing statistical classification (NACE)

⁹⁰ Idea Consulting (2013). *Survey on Access to Finance for the Cultural and Creative Sectors*, p.6-7

⁹¹ As above

⁹² ECORYS. (2010). *Interim Evaluation of the Culture Programme 2007-13*, p.3 This reliance on public subsidy is also a result of their role as 'public goods' which have external benefits to communities or economies. For example, investment in culture can be used to address issues around social cohesion.

raise private funds or secure sponsorship, they mean that many organisations are likely to be operating under significant resource constraints. Data on the survival of new businesses suggests that declining budgets since 2008 have led to an increase in business closures, although survival rates vary between sub-sectors.⁹³

1.2.3.2 Consumption patterns have dramatically changed

Overall, audience consumption and participation in cultural products declined between 2007 and 2013, with some variation across the cultural sub-sectors: the steepest decline was recorded in consuming a cultural product on TV or radio (a decline of 6 percent, although it remains the most popular form of participation). Within the performing arts, theatre attendance saw the steepest decline at 4 percent, while 'seeing a ballet, dance performance or opera' remained unchanged. Within the visual arts, 'visiting a museum or gallery' also dropped by 4 percent. The only activity to record a slight increase was cinema attendance, with one percent (see Table 1). '*Individual involvement in performing or producing a cultural or artistic activity*' has also seen a decline overall, in some cases sharp (e.g. filmmaking and dancing saw a significant decline, while singing slightly increased).⁹⁴ The factors behind this decline are considered to include a lack of interest and time as well as money.⁹⁵

Table 1. *Cultural participation patterns by subsector (2007, 2013): At least one visit in the last 12 months*

Sub-sector (with related category name applied by Eurobarometer survey in italics)	2007	2013
Literature, books & reading: Read a book	71%	68%
Cultural heritage: Visited a historical monument/site	54%	52%
Visual arts/Cultural heritage: Visited a museum or gallery	41%	37%
Performing arts – Music and opera: Been to a concert	37%	35%
Literature, books & reading: Visited a public library	35%	31%
Performing arts – Theatre...: Been to the theatre	32%	28%
Performing arts: Seen a ballet, a dance performance or an opera	18%	18%

Source: Special Eurobarometer 399. (2013) *Cultural access and participation*. (p.7).

Cultural consumption is determined by geography and demographics, with more educated and wealthier individuals more likely to engage in cultural activities.⁹⁶ Age and gender also make a significant difference.⁹⁷ Cultural participation further differs widely

⁹³ One indicator is the survival rate of newly born enterprises in the cultural sector. Of enterprises in the libraries and museums sub-sector, only 35 percent survive after five years. Indicatively, one-year survival rates in Spain and Latvia were by far the lowest ever recorded in all sectors. For enterprises working within the category of 'creative, arts and entertainment activities', this figure is slightly higher: around 40 percent survive after five years. Enterprises in the 'films, TV and music' category did best, with just over half (55 percent) surviving after five years. (Eurostat (2016) *Cultural Statistics: 2016 edition*.)

⁹⁴ Special Eurobarometer 399 (2013) *Cultural access and participation*, p.5-6

⁹⁵ **Lack of interest** was the main reason for not going to more concerts (29 percent), visiting a museum or gallery (35 percent), going to the theatre (36 percent), visiting a public library (43 percent) or attending a ballet, dance performance or opera (50 percent). **Lack of time** was the main reason for not going to the cinema (30 percent), watching or listening to a cultural programme on the TV or radio (31 percent), visiting a historical monument or site (37 percent), or reading a book (44 percent). **"Too expensive"** was mentioned as a reason for not going/ going less often, to the theatre (20 percent), the cinema (22 percent), or a concert (25 percent), although it was not given as the main reason for any of these activities. (Special Eurobarometer 399. (2013) *Cultural access and participation*. (p.4-6; 10, 21)).

⁹⁶ Special Eurobarometer 399. (2013). *Cultural access and participation*. (p.5)

⁹⁷ ESSnet-CULTURE. (2012). (p.424)

between Member States, with a recognisable pattern. This is likely to be related to the relative wealth of the Member States and may in part result from the financial and economic crisis. For example, Northern Europe typically has higher patterns of consumption than Southern or Eastern Europe. Indicatively, cost was highlighted as an obstacle to cultural consumption by many respondents, particularly in eastern European countries (Romania, Bulgaria, Hungary) and in some of the countries affected worst by the economic crisis (Greece, Portugal and Spain).⁹⁸

Consumption of non-national cultural products from EU Member States is relatively low. While 'home based' activities such as book reading and listening to a cultural TV/radio programme from another EU country register higher participation (31 percent and 27 percent respectively), those activities which cannot be consumed at home are undertaken less frequently. Among these, most visited a historical site in another country or went to a musical performance from another country; in contrast, the lowest number was registered for attending a theatre performance from another country (4 percent) (see Table 2).⁹⁹

Table 2. Cultural participation in non-national European activities, by subsector (2013): At least one visit in the last 12 months

Sub-sector	2013
(with related category name applied by Eurobarometer survey in italics)	
Cultural heritage: Visited a historical monument/site in another European country	19 %
Literature, books & reading: Read a book from an author another European country	31%
Performing arts – Music...: Been to a musical performance (concert, band) from another European country	13%
Performing arts: Seen a ballet, dance performance or opera from another European country	6%
Performing arts – Theatre...: Been to a theatre performance from another European country	4%
Performing/ visual arts: Attended a live performance, festival, exhibition or cultural activity in another EU country	10%

Source: Special Eurobarometer 399. (2013) *Cultural access and participation*. (p.38).

1.2.3.3 Digital technology creates opportunities to reach new audiences and create new forms of engagement

The digital shift has profoundly changed the way the culture sector produces and distributes cultural products. This shift has challenged existing business models, required the acquisition of new skills in cultural organisations, and enabled new ways of engaging with audiences.

In practice, the magnitude of the impact of digital shift on revenues and business models in the sector remains unclear, save the fact that the culture sector has been profoundly affected. For example, the music sector has moved from a reliance on the sale of physical media (CDs) to digital media (MP3s and streaming services).¹⁰⁰

⁹⁸ Special Eurobarometer 399. (2013). (p.5)

⁹⁹ Special Eurobarometer 399. (2013). (p.5-6)

¹⁰⁰ JRC (2012) Statistical, Ecosystems and Competitiveness Analysis of the Media and Content Industries: A Quantitative Overview

The adoption of digital technology enables new audiences to be reached, and in new ways. For example, cultural centres can launch online art competitions across borders, theatre or music performances can be screened to the remote corners of the country, and organisations can use social media to encourage audience interaction. These developments are not viewed as positive by all players. For example, enabling remote viewing of exhibitions or performances is sometimes seen as providing competition for local live performances.¹⁰¹

In part, this may be because digital technologies provide opportunities and associated benefits that cultural organisations may not yet have the capability to realise. For example, in the UK theatre sector, recent research shows that only 12 percent of theatre organisations were involved in digital screening, while there remained significant concerns around costs, quality, skills and audience displacement.¹⁰²

1.2.3.4 Increasing recognition of societal and economic benefits from supporting culture

Engagement with the culture sectors produces benefits beyond entertainment of an audience or direct economic contribution. Specific benefits to society include supporting civic or community engagement and improving health and well-being, particularly from participation in cultural activities; and a range of indirect economic effects¹⁰³, such as attracting tourism, as an instrument of soft-power, supporting ICT product development, engaging young people in education, or as a mechanism through which to address some social challenges.¹⁰⁴ Exposure to culture may also stimulate creativity in individuals and workers, which is increasingly important in a knowledge-based society.¹⁰⁵

Increased recognition of such effects contributes to policymakers' rationales for providing support to the sector.¹⁰⁶ Recognising the above, a range of initiatives have furthermore been using culture to address immediate societal concerns such as political extremism or inequality. For instance, museums have worked with refugees to help them better integrate in society and to promote a feeling of empathy with their host Member States.¹⁰⁷

1.3 EU Policy Context

The development of the EU's policies for CCS sector support has taken into account the changing economic and technological context set out previously.

Culture is an explicit EC competence since the 1993 Maastricht Treaty.¹⁰⁸ The role of the EU is to complement national action in the culture field by stimulating dialogue and

¹⁰¹ Most evidence suggests that it does not, at least for theatre e.g. AEA Consulting for Arts Council England (2016) *Understanding the Impact of Digital Developments in Theatre on Audiences, Production and Distribution*

¹⁰² BOP Consulting (2016) *Analysis of Theatre in England*, for Arts Council England; European Skills Council for employment and training in the Audiovisual and Live Performance sectors (2016) *Trends and skills in the European audiovisual and live performance sectors*.

¹⁰³ Crossick and Kaszynska for the AHRC (2016) *The Cultural Value Project: Understanding the value of arts & culture*

¹⁰⁴ See KEA European Affairs. (2006). *The Economy of Culture in Europe*; ECORYS. (2010). *Interim Evaluation of the Culture Programme 2007-13*; Oakley et al for Nesta. (2008). *The Art of Innovation*; Lee and Poze. (2014). *Creativity, Cities, and Innovation*; Europe Economics for the European Commission. (2015). *The Economic Review of Design in Europe*

¹⁰⁵ European Commission, DG Education & Culture. (2010). *Information Note on the Public Consultation on a Future European Union Culture Programme*; Warwick Commission (2015) *The Future of Cultural Value*

¹⁰⁶ IRS et al for DG Regio. (2015). *Culture and Tourism: Ex post evaluation of Cohesion Policy programmes 2007-2013, focusing on the European Regional Development Fund (ERDF) and the Cohesion Fund (CF)*

¹⁰⁷ Anny Shaw in The Art Newspaper (15-06-2016) How artists and museums are addressing the refugee crisis

¹⁰⁸ Article 151 of the Maastricht Treaty: *"The Community shall contribute to the flowering of the cultures of the Member States, while respecting their national and regional diversity and at the same time bringing the common heritage to the fore. [...] Action by the Community shall be aimed at encouraging cooperation between*

mutual understanding between Member States, and with third countries and relevant international bodies. Targeted EU programmes thus generally promote cultural activities such as artistic networking and exchanges across Member States territories¹⁰⁹, while other EU funding programmes are directed nationally/regionally to support investment in the CCS sector.¹¹⁰

EU policies have gradually moved toward a broader understanding of culture and creativity and their role in European society and economy. The 2007 European Commission "*Communication on a European Agenda for Culture in a Globalising World*"¹¹¹ recognised the complex value of culture, and how it contributes to other aspects of the society and economy. It sets out Europe's main goals in this field, from fostering cultural diversity and intercultural dialogue; to supporting growth and jobs (in the framework of the Lisbon Strategy) by acting as a catalyst for creativity; to training cultural professionals; to acting as a key element in the EU's international relations. Overall, the CCS are thus increasingly seen as important assets in strengthening the European economy and its competitiveness, visible in a range of successive policy developments, strategies and initiatives.

Some of these specifically aim to address the challenges and opportunities faced by the CCS and are in turn reflected in the activities of Creative Europe.¹¹² In chronological order:

- The 2010 European Commission Green Paper '*Unlocking the potential of cultural and creative industries*'¹¹³ considered the use of policies and instruments at all levels to help unlock the CCS's potential and set out a vision in which CCS companies play a greater role in national/ regional innovation systems and regional development.¹¹⁴
- The improvement of cultural statistics was identified as a priority area in the 2008-2010 Work Plan for Culture. From 2009-2011, ESSnet-Culture was set up to update the methodology for data generation of comparable cultural statistics.¹¹⁵
- A 2012 strategy¹¹⁶ recognised the CCS as catalyst for innovation and element in global competition and soft power and identified a series of actions to face the challenges of digitisation, internationalisation and access to finance.
- A 2014 Work Plan for Culture 2015-2018¹¹⁷ was drafted by the EU Council to address challenges faced by CCS organisations in the context of globalisation and digitisation, with a focus on accessible and inclusive culture; cultural heritage; creative economy and innovation; promotion of cultural diversity; and culture in EU external relations and mobility.
- EU structural funds 2014-2020 make reference to the sector; e.g. the European Social Fund (ESF) mention cultural and creative skills.
- The sector is recognised as relevant to the Digital Agenda for Europe (2010), which supports the distribution of the European digital service infrastructure and

Member States and, if necessary, supporting and supplementing their action [...]." Further confirmed by the Treaty of Lisbon (2007).

¹⁰⁹ Commission staff working document - *Inventory of Community actions in the field of culture* SEC (2007) 570

¹¹⁰ For example, ERDF in the 2007-13 programming period allocated EUR 6,035 million to culture (2.3 percent of overall ERDF allocations). (Irs, Csil, Ciset, BOP Consulting. (2015). *Culture and Tourism: Ex post evaluation of Cohesion Policy programmes 2007-2013, focusing on the European Regional Development Fund (ERDF) and the Cohesion Fund (CF)*)

¹¹¹ European Commission. (2007). *Communication on a European Agenda for Culture in a Globalising World*, Brussels.

¹¹² European Commission. (2012). *Communication on promoting cultural and creative sectors for growth and jobs in the EU*. COM (2012) 537 final

¹¹³ European Commission. (2010). *Green Paper on "Unlocking the potential of cultural and creative industries"*, Brussels.

¹¹⁴ Sörvik, J. & Kleibrink, A. (2015) *Mapping Innovation Priorities and Specialisation Patterns in Europe*. European Commission

¹¹⁵ The European Statistical System network on Culture. ESSnet-Culture (2012) Final Report (p.5; 20; 28)

¹¹⁶ European Commission (2012). *Communication on promoting cultural and creative sectors for growth and jobs in the EU*.

¹¹⁷ Council of the European Union (2014). Draft Conclusion of the of the Council and of the Representatives of the Governments of the Member States, meeting within the Council, on a Work Plan for Culture (2015 - 2018), Brussels

development of a digital single market. The *Digital Single Market Strategy* was endorsed by the European Council in June 2015 as one of the flagship initiatives of EU 2020 to bring the principles of the single market to the digital realm and was followed by the European Parliament motion 'Towards a Digital Single Market Act' in January 2016.

- As a key priority for the EC, the DSMS is built on three pillars – 'improving transnational access to digital goods and services'; 'creating an environment where digital networks and services can prosper'; and 'supporting the use of digital as a driver for growth'. This includes better access to (digital) cultural content, building on Europe's rich cultural diversity.¹¹⁸ Under the DSMS the implementation of a new EU copyright agenda recently began, aiming to bring the principles of the single market to the digital realm and to the use of all online content. It specifically supports cross-border access to online content and usage of copyright materials in education, research and cultural heritage. The DSMS is currently under review.
- In May 2016, a new legislative proposal amending the Audiovisual Media Services Directive (AVMSD) was adopted by the European Commission with the aim to strengthen the promotion of European cultural diversity and to ensure the independence of audiovisual regulators.¹¹⁹ This was followed in June 2016 by the adoption of the *Strategy for international cultural relations*, which further brings culture to the heart of external relations.¹²⁰

1.4 Presentation of the Programmes

1.4.1 Sector funding schemes have adapted to the changing contexts in which they operate, but remain small compared to the CCS' overall size

Over the past years, the European Commission's key funding programmes for the CCS – with a separate focus on the AV sector (MEDIA) and culture sector (Culture) – have adapted to developments within the sector as well as to the changing policy impetus¹²¹, for example by an increasing emphasis on the CCS' economic contributions, and an increasing focus on MEDIA's digital component (see Section 1.6.5). The increasing recognition of the entire Culture and Creative Sector as an asset to strengthen the European economy and its competitiveness is thus visible in the build of the Programmes themselves. The 2006 decision establishing MEDIA 2007 gave the MEDIA 2007 programme a double legal basis with reference to Article 150 (4) 'support to vocational training that supplements and supports member states' actions' and Article 157 (3) 'contribution to the competitiveness of the Community's industry' of the Treaty establishing the European Community; while the Culture Programme was based only on Article 151 (5) 'contributing to the 'flowering of cultures' and a common cultural heritage'. This changed with the 2013 Decision establishing the Creative Europe Programme, which gave the whole programme – i.e. including both the Culture and Media Sub-Programmes – a triple legal basis, referring to Article 166 (4) 'vocational training'; Article 173 (3) 'industrial competitiveness'; and Article 167 (5) 'the flowering of cultures' of the Treaty on the Functioning of the European Union.

¹¹⁸ European Commission (2015). *Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. A Digital Single Market Strategy for Europe* (No. COM (2015) 192 final). Brussels

¹¹⁹ European Commission (2016) Press release: Commission updates EU audiovisual rules and presents targeted approach to online platforms, http://europa.eu/rapid/press-release_IP-16-1873_en.htm

¹²⁰ European Commission (2016) Press release: A new strategy to put culture at the heart of EU international relations, http://europa.eu/rapid/press-release_IP-16-2074_en.htm

¹²¹ Please see the Interim evaluations of the predecessor MEDIA and Culture programmes.

While both the MEDIA and Culture programmes lie under the overall responsibility of DG EAC and the relevant Executive Agency (EACEA¹²²), the MEDIA programme is managed by DG CNECT, while the Culture programme is managed by DG EAC. Operationally, they are supported in this on a national level by the Creative Europe Desks (successors of the MEDIA Desks and Cultural Contact Points under Culture and MEDIA 2007). These are managed by DG EAC with assistance from EACEA and are tasked with providing information about the programme nationally and assisting the local CCS in relation to the programme; supporting the Commission by providing information on the local CCS; and stimulating cross-border cooperation with the CCS.¹²³

In line with the subsidiarity principle, the EU has relatively limited influence over the CCS sector compared to national governments and it makes a commensurately small financial contribution to the funding of the programmes when compared to the sector's overall size. Over the period of 2014 to 2020, Creative Europe is distributing around €208 million per year across the 28 Member States for a total of €1.46 billion. To put this into perspective, the combined Gross Value Added of the cultural and AV sectors amounted to around €178 billion in 2014.¹²⁴ Italy's public cultural expenditure alone for example came to just below €6 billion in 2015, while the eleven EU post-communist countries together spent €7.4 billion on public cultural expenditure in the same year.¹²⁵ Rather than acting as a substitute for national support systems, the programmes have from the beginning focused on providing *additional* support with a particular focus on transnational activities. In doing so, the programmes aim to create a European AV and cultural sector to help the industry become internationally more competitive while addressing structural problems such as the market fragmentation, or lack of scale on a national level.

1.4.2 MEDIA 2007

The MEDIA 2007 programme provided support to the audiovisual sector between 2007 and 2013. It was the continuation of a coherent, long-term financial intervention policy in support of the audiovisual sector that started in 1991 with MEDIA I and was then continued by MEDIA II; MEDIA Plus and MEDIA Training followed (2001-2006).

MEDIA 2007 was adopted in November 2006 with a budget of €755m over seven years. While in its previous iteration an entire programme was devoted specifically to training (MEDIA Training), MEDIA 2007 was developed into a more *integrated programme grouping together various types of support, in both the pre-production and the post-production stages*¹²⁶ and included funding for training. It had three global objectives:

- to preserve and enhance European cultural and linguistic diversity and its cinematographic and audiovisual heritage, guarantee its accessibility to the public and promote intercultural dialogue;
- to increase the circulation and viewership of European AV works in- and outside the European Union, including through greater cooperation between players;
- to strengthen the competitiveness of the European audiovisual sector in the framework of an open and competitive European market favourable to employment, including by promoting links between audiovisual professionals.

¹²² The Education, Audiovisual and Culture Executive Agency, responsible for the management of certain parts of the EU's funding programmes in the fields of education, culture, audiovisual, sport, citizenship and volunteering.

¹²³ As per Regulation No 1295/2013, Article 16

¹²⁴ Eurostat data – GVA by sector. GVA for the cultural sector grew from around €96 billion in 2007 to around €108 billion in 2014 (note that this includes: creative, arts and entertainment activities, libraries, archives, museums and other cultural activities as well as gambling and betting). GVA for the AV sector grew from €67 billion to €70 billion in the same period (including: motion picture, video, TV programme production, programming and broadcasting activities).

¹²⁵ Eurostat data (2009-2014): General government expenditure by function (COFOG) cited in Budapest Observatory (2017).

¹²⁶ Eureval and Media Consulting Group (2010). *Interim Evaluation of MEDIA 2007-13*. Final Report, p.5

Most actions implemented under the previous iterations of the programme remained in place. In addition, MEDIA 2007 introduced new actions in a range of areas across development, distribution and promotion. These reflected the rise of digital technology in the sector; support to DVD and video distribution was discontinued while support to VOD and digital cinematographic distribution (DCD), web communities and open media was introduced. Initial training and the development of interactive works was also supported.

In summary, MEDIA 2007 supported the following schemes, grouped together in Table 3. This shows that overall, €769 million were spent across all schemes between 2007 and 2013; slightly more than the initially allocated budget. Of this, the largest proportion of spend was allocated to Distribution schemes (35 percent); followed by Development schemes (16 percent), Promotion schemes (12 percent) and TV Broadcasting (10 percent).

Table 3. MEDIA 2007: Supported schemes and spend per scheme (million)

MEDIA 2007	Total spent (2007-2013)	% of total budget
Training (continuous; initial)	57,125,472	7.4%
Development (Single Projects; Slate Funding)	125,151,403	16.3%
Distribution (Cinema Automatic; Cinema Selective; VOD; Sales Agents)	271,715,508	35.3%
Promotion (Promo/Access to Market; Festivals; Stands; Promotion outside MEDIA)	89,393,160	11.6%
TV Broadcasting	79,077,724	10.3%
Cinema Networks (Networks; Networks outside MEDIA)	73,531,380	9.6%
i2i-Audiovisual	19,360,060	2.5%
Media desk/antenna	20,817,735	2.7%
Pilot projects	8,388,752	1.1%
Development Interactive and Development New Talent	14,024,361	1.8%
Digitisation of Cinemas	9,620,000	1.3%
European Rendez-vous Cannes	700,000	0.1%
TOTAL	768,905,555	100%

1.4.3 MEDIA Mundus 2011-2013

The MEDIA Mundus programme was introduced in 2011 with a budget of €15 million, following on from MEDIA International, which distributed €8 million between 2008 and 2010. It was managed and implemented by EAC and then EACEA.

The programme's key objective was to increase the competitiveness of the European AV industry to enable Europe to play its cultural and political role in the world more effectively and to increase consumer choice and cultural diversity. The programme particularly aimed to foster cooperation between professionals from Europe and third countries for the broadcasting of AV work, thereby improving access to third-country markets and building trust and long-term working relationships across geographies.

The support to international cooperation projects with professionals from third countries in the AV sector activities pursued three key objectives:

- Information exchange, training and market intelligence – e.g. support for training and information exchange at an international level; training on international conditions for production, distribution and exhibition of AV works; training on new technologies);
- Competitiveness and Distribution – e.g. facilitation of the search for third country partners; support to the organisation of co-production markets; promotion of the

distribution and exhibition of EU films in third countries and of non-EU films within Europe;

- Circulation – e.g. improvement of programming and exhibition conditions for AV works across Europe and third countries as well as improvement of the distribution of third countries' AV works on European distribution channels; organisation of events, particularly for young audiences.¹²⁷

Overall, €13,757,700 were spent on the programme between 2007 and 2013; slightly less than the initially allocated budget.

1.4.4 Culture 2007-2013

As with MEDIA 2007, Culture 2007-2013 built on over a decade of funding activities. Support to the sector was initially separated into three distinct schemes; Kaleidoscope (for performing, visual and applied arts), Ariane (literature) and Raphael (cultural heritage), which ran until 1996, 1997/8 and 2000 respectively. These three schemes were subsequently brought together in one overarching programme: Culture 2000, which ran from 2000 to 2006, and was managed by DG EAC. This *'had a very broad set of objectives, some relating to the promotion and enhancement of culture, cultural diversity and creativity and others relating to the role of culture in achieving socio-economic objectives'*.¹²⁸ Alongside providing support to previously supported actions such as festivals, exhibitions, translations, tours and conferences, Culture 2000 introduced the provision of grants for cultural co-operation projects across a range of artistic and cultural fields.

Based on the experience of the past programmes, Culture 2007-2013 was introduced in December 2006 with a budget of €400 million over seven years.

Culture 2007-2013's general objectives as outlined in Art. 3.1. of its Decision¹²⁹ were:

- Enhancing the cultural area shared by Europeans; and
- Developing cultural cooperation between creators, cultural players and cultural institutions with a view to encouraging European citizenship.
- The specific objectives as outlined in Art 3.2 of the Decision included:
- Promoting the transnational mobility of cultural players;
- Encouraging the transnational circulation of works and cultural and artistic products; and
- Encouraging intercultural dialogue.

The rationale for the support rested on the recognised benefits of linguistic and cultural cooperation to European integration as well as social and economic development, and the recognition that cultural co-operation needs support to ensure that capacity and activities in this area are strengthened. The programme aimed to promote and protect Europe's cultural and linguistic diversity as well as to support intercultural dialogue, transnational cultural co-operation and circulation of works. Compared to the previous periods, several key changes were introduced, including:

- a set of specific objectives: promotion of the transnational mobility of cultural players; encouragement for the transnational circulation of works and cultural and artistic products; and encouragement of intercultural dialogue.

¹²⁷ *Media Mundus audiovisual cooperation programme with professionals from third countries 2011-2013, Summary*. <http://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=LEGISSUM:am0003&from=EN>

¹²⁸ ECORYS. (2010). *Interim Evaluation of the Culture Programme 2007-13*, p.ii

¹²⁹ Decision No 1903/2006/EC of the EU Parliament and of the Council of 12 December 2006 establishing the Culture Programme (2007/2013)

- a different set of activities supported, with some being adapted from previous activities and others representing existing activities previously supported by funding earmarked by the European Parliament (e.g. support for organisations active at the European level in the field of culture).
- enabling of more extensive transnational co-operation in the sector, mobility of artists and circulation of works; the showcasing of cultural diversity.¹³⁰

Under Culture 2007, these objectives were supported through three main funding strands and related schemes:

- Strand 1: Support for cultural actions:
 - Multi-annual co-operation projects (three to five years and involving at least six cultural operators from six countries); co-operation projects aimed at smaller cultural operators (up to two years); co-operation projects between organisations involved in cultural policy analysis)
 - Translations of literary works
 - Various special actions (i.e. cultural cooperation with third countries; European capitals of culture; European prizes; support for co-operation with international organizations; festivals)
- Strand 2: Support for organisations active at European level in the culture field; multi-annual framework partnership agreements or operating grants to support the permanent work programmes of organisations pursuing an aim of general European interest in the field of culture:
 - European Cultural Networks
 - European Cultural Ambassadors
- Strand 3: Support for analysis, collection and dissemination activities
 - e.g. Cultural Contact Points; analysis in cultural cooperation and policy development; maximising impact of projects in cultural cooperation.

Overall, across the Culture Programme, €364.4 million was spent across all schemes between 2007 and 2013; around €36 million less than the initially allocated budget (see Table 2). Of this, by far the largest proportion of spend was allocated to Cooperation Projects (70 percent). By comparison, all other schemes received only small proportions of funding, ranging from 6 percent for the European Cultural Ambassadors scheme to 0.2 percent for 'Support for analysis, collection and dissemination'.

¹³⁰ ECORYS. (2010). *Interim Evaluation of the Culture Programme 2007-13*, p.3

Table 4. Culture Programme 2007: Supported schemes and spend per scheme (million)

Culture Programme 2007-2013	Total spent (2007-2013)	% of total budget
Cooperation Projects (Cooperation Measures; Multi-annual CP; CP between organisations involved in cultural policy)	256,059,335	70.3%
Cultural Bodies of European Interest (Advocacy; Platform; Networks)	16,110,781	4.4%
Literary Translation	17,351,583	4.8%
Special Actions (Cooperation with Council of Europe; ECOC; Annual Prize; EU Presidency)	12,822,969	3.5%
European Cultural Ambassadors (Ambassador; FPA)	20,443,855	5.6%
Festivals (Annual; Multi-annual; FPA; Festival)	14,574,709	4.0%
Support for analysis, collection and dissemination (on creativity; on mobility; mapping of media space; on cultural industries)	740,860	0.2%
Cultural Contact Point	8,975,358	2.5%
Third countries	13,935,635	3.8%
Policy (PAG; SDP)	1,388,355	0.4%
Procurement	1,985,634	0.5%
TOTAL	364,389,075	100%

1.4.5 Creative Europe 2014-2020

Creative Europe is the EU's current seven-year programme supporting the creative and culture sectors. It brings together its three predecessor programmes, Culture 2007-2013, MEDIA 2007-2013 and MEDIA MUNDUS in one overarching financial framework.

DG EAC is the lead coordinator of the overall Programme, which is composed of three strands:

- the MEDIA Sub-programme (replacing MEDIA and MEDIA MUNDUS) – management overseen by DG CNECT with support from EACEA;
- the Culture Sub-programme – management overseen by DG EAC with support from EACEA; and
- a new Cross-sectoral Strand – jointly managed by both DGs, with support from EACEA.

The financial resources of Creative Europe increased by 9 percent to €1.4 billion across 2014-2020 compared to the predecessor programme period. Of this, around 56 percent is earmarked for the MEDIA Sub-programme (€784 million), 31 percent to the Culture Sub-programme (€434 million), and a maximum of 13 percent to the Cross-Sectoral strand (€182m). At the same time, Creative Europe's scope has been broadened both in terms of sector scope¹³¹ (type of operators) and geographical scope, as non-EU countries are now able to participate in the programme based on specific agreements. Greater emphasis is now also put on the CCS' economic contributions, effectively resulting in a stronger focus on elements such as economic development and job creation, competitiveness, new business models, audience development and digital solutions.

Building on the predecessor programmes, the rationale for the Creative Europe programme (as per the Regulation) revolves around the need for continuing support in developing access to finance for the CCS; increasing the scale and competitiveness of SMEs; creating an attractive environment for innovation and creativity at EU level;

¹³¹ Including inter alia architecture, archives, libraries, museums, artistic crafts, audiovisual (film, TV, video games, multimedia), tangible and intangible cultural heritage, design, festivals, music, literature, performing arts, publishing, radio and visual arts (Regulation of the European Parliament and of the Council on establishing the Creative Europe Programme, 2013, Brussels.)

supporting skills development around new production, distribution and business models; and developing comparable data to guide investment in the CCS.

Reflecting this rationale, the programme pursues six objectives (including two general¹³² and four specific objectives) and 15 priorities. Its general objectives (Article 3 of the Regulation) are to:

- safeguard, develop and promote European cultural and linguistic diversity and to promote Europe's cultural heritage; and,
- strengthen the competitiveness of the European cultural and creative sectors, particularly the AV sector, with a view to promoting smart, sustainable and inclusive growth.

Its specific objectives (Article 5) are to:

- support the capacity of the European cultural and creative sectors to operate transnationally and internationally;
- promote the transnational circulation of cultural and creative works and transnational mobility of cultural and creative players, particularly artists, and to reach new and enlarged audiences and improve access to cultural and creative works in the Union and beyond, with a particular focus on children, young people, people with disabilities and under-represented groups;
- strengthen the financial capacity of SMEs and micro, small and medium-sized organisations in the cultural and creative sectors in a sustainable way, while endeavouring to ensure a balanced geographical coverage and sector representation;
- foster policy development, innovation, creativity, audience development and new business and management models through support for transnational policy cooperation.

While the first specific objectives are addressed by the Media and Culture Sub-programmes, the last objective is addressed primarily by the Cross-Sectoral Strand. The 15 priorities further determine the types of actions funded, specific to each of the three Sub-programmes depending on the sector, activities and beneficiaries targeted.

1.4.5.1 MEDIA 2014-2020 Sub-programme

The Media Sub-programme of Creative Europe is designed to support the AV and media sectors, and builds directly on its two predecessor programmes, MEDIA (2007-2013) and MEDIA Mundus (2011-2013).¹³³ As with its predecessor, the MEDIA sub-programme aims to build the capacity of the sector and its players, and to facilitate transnational distribution and circulation. However, with the current programme the political responsibility for the MEDIA Sub-programme was transferred from DG EAC to DG CNECT, with the corresponding change in policy priorities (with the 2015 DSMS). As well, the operating landscape in the audiovisual sector has significantly changed since the start of Creative Europe, with the rapid growth of online consumption.

Overall, bringing together the predecessor MEDIA and MEDIA Mundus programmes into one sub-programme removed the split between the 'European' and 'international' contexts, reflecting the international character and impact of the sector – and in particular new technologies. This means that the European AV sector increasingly works, collaborates and competes within an international market.

¹³² Note that the first general objective has been split into two separate general objectives.

¹³³ See Sections 2.3.2 and 2.3.4 for further detail

More specifically, the MEDIA Sub-programme addresses the general and specific objectives of the Creative Europe programme. Article 9 of the Regulation further operationalises these objectives under seven priorities. These relate to acquisition and improvement of skills and competences of AV professions, increasing capacity of AV operators to develop works with transnational circulation potential, encouraging B2B exchanges to increase the visibility of works on international markets, supporting transnational theatrical distribution and distribution on non-theatrical platforms, audience development for European AV works and promotion of new distribution modes and business models. As its predecessor programme, the Sub-programme supports capacity building and transnational circulation through ongoing support to skills development; the development phase of AV works; distribution through VOD platforms; and international promotion and distribution. However, adaption to changing sector circumstances has resulted in a stronger focus on:

- audience development;
- the development of new business models through the promotion of flexible cross-border distribution models and support to innovative actions (linked to the harnessing of new technologies); and
- support to other sectors, such as video games.¹³⁴

While the predecessor programmes had a greater focus on the supply side of the sector (development and distribution), MEDIA under Creative Europe is also starting to work on the demand side of the AV sector. The scope of MEDIA's digital component has furthermore been widened, reflected in re-naming the 'Support to European VOD services' scheme to 'Online Distribution' in 2015 and 'Promotion of European works online' in 2017. Since then, the scheme has been further adapted from 2017 in line with the DSMS to cover two key objectives: support to innovation and new distribution/promotion models; and increasing European films in catalogues. The allocated budget to the scheme will increase from €5.6 million in 2016 to €9.5 million in 2017. Meanwhile, other activities of the predecessor programme have been discontinued or rebranded.

In summary, Creative Europe MEDIA supports a range of schemes, across which €327 million have so far been spent, as outlined in Table 3. This also highlights the main changes that have been made to the programme schemes between the MEDIA 2007 and current Sub-programme period, including:

- the continuation of support for Development; Distribution Cinema Networks, Promotion and Training;
- the re-branding of two schemes: 'Support to European VOD services' changed to 'Online Distribution'; TV Broadcasting changed to TV Programming;
- the introduction of several new schemes: Audience Development; Development of European Video Games; Support for Selection; Support to international co-production funds;
- the discontinuation of several schemes: i2i-Audiovisual; Media desk/antenna; Pilot projects; Development Interactive and Development New Talent; Digitisation of Cinemas; European Rendez-vous Cannes.

¹³⁴ Previously only addressed through the support to interactive works and in conjunction with AV works

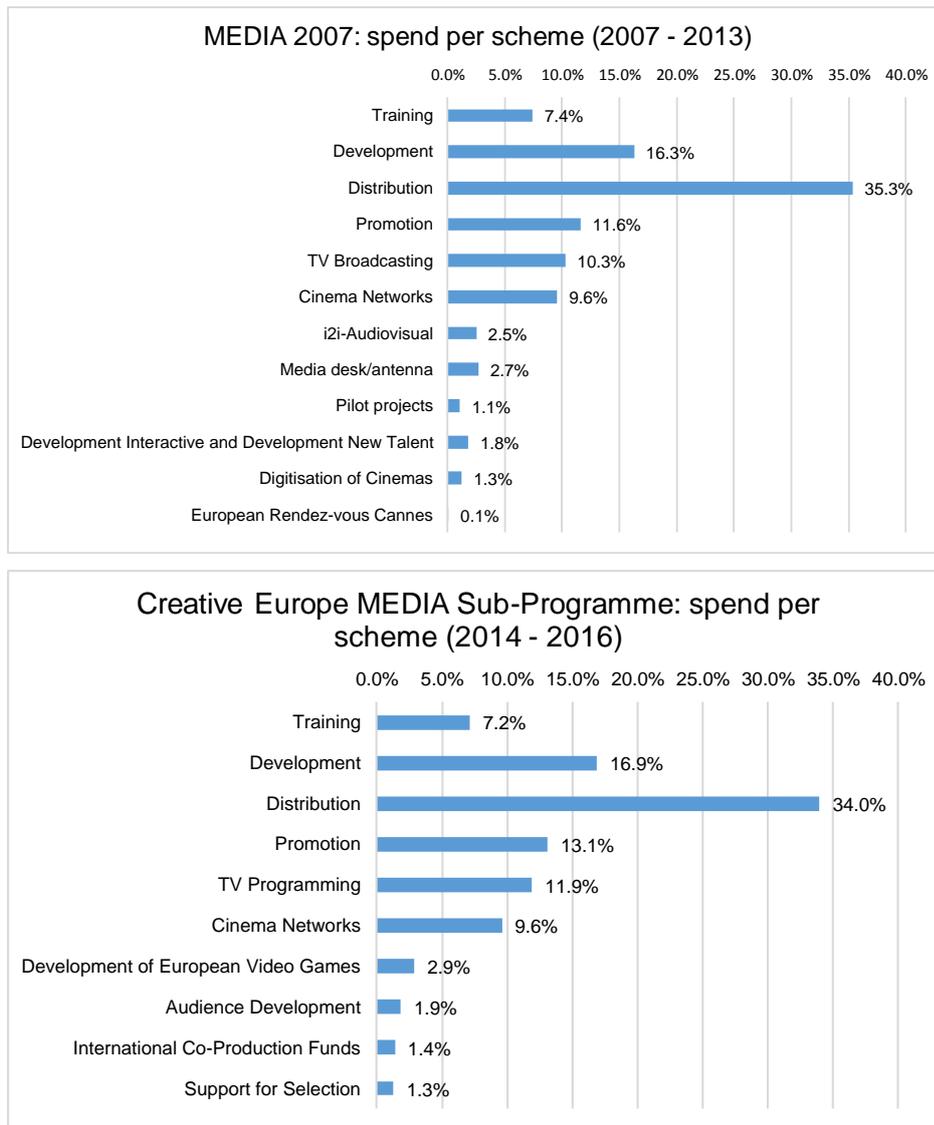
Table 5. Creative Europe MEDIA Sub-programme: Supported schemes and spend per scheme (million)

Media 2014-2020 (2014-2016 data)	Total spent (2014-2016)	% of total budget
Training (capacity building/training; training)	23,391,371	7.2%
Development (Single Projects; Slate Funding)	55,173,278	16.9%
Distribution (Cinema Automatic; Cinema Selective; Online Distribution, Sales Agents)	111,041,769	34.0%
Promotion (Access to Market, Film Festivals, Stands, MED Markets)	42,861,484	13.1%
TV Programming	38,941,174	11.9%
Cinema Networks	31,360,000	9.6%
Development of European Video Games	9,409,191	2.9%
Audience Development	6,049,683	1.9%
International Co-Production Funds (Co-Prod funds; international co-prod funds)	4,531,000	1.4%
Support for Selection (Selection - experts; Support to project selection)	4,202,201	1.3%
TOTAL	326,961,151	100%

Lastly, Figure 2 below provides a visual comparison of the spend per scheme under MEDIA 2007 and the current MEDIA Sub-Programme. This particularly highlights three observations:

- Across both programme periods, Distribution has remained by far the largest scheme, being allocated 35 percent and 34 percent of total spend respectively.
- Similarly, Development, Promotion and TV Broadcasting/ Programming have remained the next three largest schemes (by spend) across both programme periods.
- Development of European Video Games and Audience Development are the largest of the four newly introduced schemes under the current programme. However, compared to the continued schemes, they are relatively small, at 3 percent and 2 percent respectively. This compares in size to discontinued schemes such as Media desk/ antenna (3 percent) and Development Interactive and Development New Talent (2 percent).

Figure 2. Comparison between MEDIA 2007 and Creative Europe MEDIA Sub-programme: spend per scheme



1.4.5.2 Culture 2014-2020 Sub-programme

Creative Europe built on the predecessor Culture Programme to incorporate it as a sub-Programme of Creative Europe 2014-2020. The overriding rationale for the intervention has remained broadly similar across the programme's evolution, aiming to address needs around the preservation and protection of cultural and linguistic diversity, the promotion of Europe's cultural heritage and the development of more attractive framework conditions for creativity and innovation. The main difference lies in the Sub-programme shift towards some new priorities under Creative Europe: audience development, capacity building, new business models and the digital agenda (in line with its now triple legal basis referring to training, industrial support and support to the 'flowering of cultures' as outlined in Section 1.4.1).

The Sub-programme's objectives are reflected in the expected results of Culture 2014-2020, which include, *inter alia*:

- Increased capacity in terms of skills, competences and know-how of CCS sector;

- Increased transnational circulation of cultural and creative works;
- Enhanced international mobility of cultural players;
- New and enlarged audiences reached (especially children, young persons, disabled and other under-represented groups);
- Stimulated cultural diversity; and
- Improved access to cultural and creative works.

In summary, the Creative Europe Culture Sub-programme supports the following schemes, outlined in Table 3. So far, €179 million have been spent across these schemes; with the largest proportion by far (64 percent) going to the Cooperation Project scheme. Key changes to the schemes between the current and previous programming period include:

- the previous 'Cultural Bodies of European Interest' scheme has been rebranded 'Networks', and 'Platforms' have been introduced as a new scheme
- a number of previously-supported schemes have been discontinued, including *inter alia*, the European Cultural Ambassadors scheme; Festivals; and Cultural Contact Points.

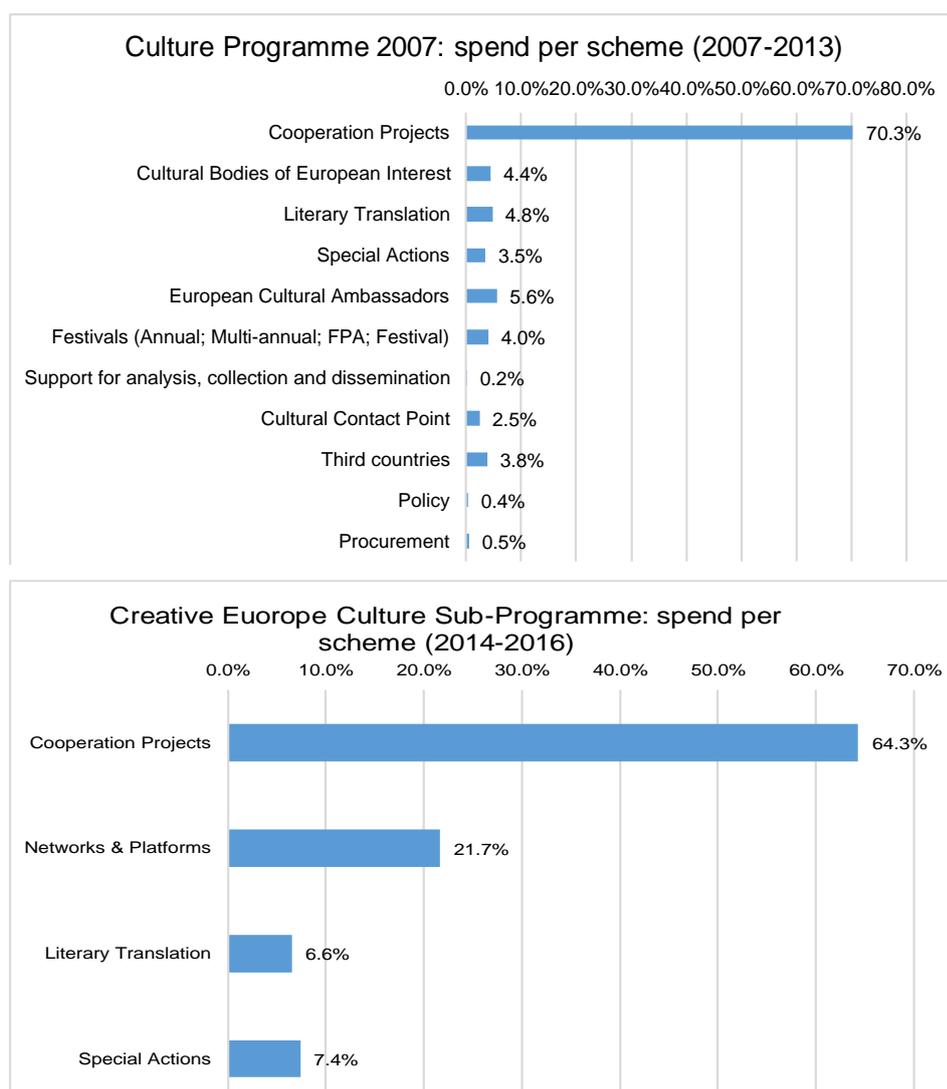
Table 6. *Creative Europe MEDIA Sub-programme: Supported schemes and spend per scheme (million)*

Culture 2014-2020	Total spent (2014-2016)	% of total budget
Cooperation Projects (larger- and smaller-scale)	115,094,654	64.3%
Networks & Platforms	38,794,443	21.7%
Literary Translation (annual; multi-annual; projects; two year projects)	11,719,337	6.6%
Special Actions (Cooperation with international organisations; ECOC; European Heritage Label, EU prize in the field of culture)	13,292,983	7.4%
TOTAL	178,901,417	100%

Lastly, Table 6 allows for comparison of the proportional spend per scheme between the Culture Programme 2007 and the current Culture Sub-Programme. This comparison highlights that:

- across both programming periods, the Cooperation Project scheme has remained by far the most important (in terms of spend), making up 70 percent and 64 percent of total spend respectively;
- a large number of very small schemes (compared to the Cooperation Project scheme) under the predecessor programme have been consolidated into three schemes, each of which have received larger proportions of overall spend under the current programme period;
- Most notably, spend for 'Cultural Bodies of European Interest' under the predecessor programme (4 percent) has been increased to a combined total of 22 percent for Networks and Platforms under the current Sub-programme.

Table 7. Comparison between Culture 2007 and Creative Europe Culture Sub-programme: spend per scheme



1.4.5.3 The Cross-sectoral strand

A new feature of Creative Europe, the Cross-sectoral strand was established with the Regulation 1295/2013 establishing the Creative Europe programme. With a maximum 13 percent allocation of the Creative Europe budget, it is the smallest programme strand.

The Cross-sectoral strand aims to support the objectives of the overall Programme. Its objectives are therefore aligned with the general objectives of the Creative Europe Programme (Article 3 of the Regulation), with the strand expected to contribute specifically to the objectives of:

- supporting the capacity of European CCS to operate transnationally;
- strengthening the financial capacity of SMEs in the CCS;
- fostering policy development, innovation, creativity, audience development and new business/management models through transnational policy cooperation; and
- promoting the transnational circulation/mobility of CC works and players.

- The Cross-sectoral strand is hence designed to provide targeted higher-level support to key identified horizontal sector needs – largely delivered through intermediary bodies – which aims to enhance the professionalisation and sustainability of the CCS environment and with it, the effective implementation of the Programme.

Based on these objectives, the Cross-sectoral strand focuses on three key needs pertinent to *both* the AV and Cultural sector. These make up the interlinking priorities and actions of the strand (Article 15):

- The improvement of access to finance from private sources for CCS organisations; as well as of financial intermediaries' investment readiness and capacity to assess the risk of working with CCS SMEs and their projects through a Guarantee Facility acting as insurance to financial intermediaries.
- The promotion of transnational policy cooperation, to support the exchange of experience and know-how relating to new businesses and management models, through:
 - Transnational knowledge exchange of new business/ management models, among organisations and policy-makers;
 - Collection of market data; studies; analysis of labour, skills and market needs; cultural policies analysis and support for statistical surveying;
 - Contribution fee for EU membership of the European Audiovisual Observatory (EAO) to foster data collection and analysis in the AV sector;
 - Testing new and cross-sectoral business approaches to funding, distributing and monetising creation;
 - Conferences, seminars and policy dialogue, including in the field of cultural and media literacy, incl. promotion of digital networking where appropriate
- Provision of support to the Creative Europe programme at national level, through:
 - Supporting a network of Creative Europe Desks in the member states, which provide information about, promote and offer support in relation to the Creative Europe Programme; stimulate cross-border cooperation; and assist by providing information about the national CCS (Article 16).

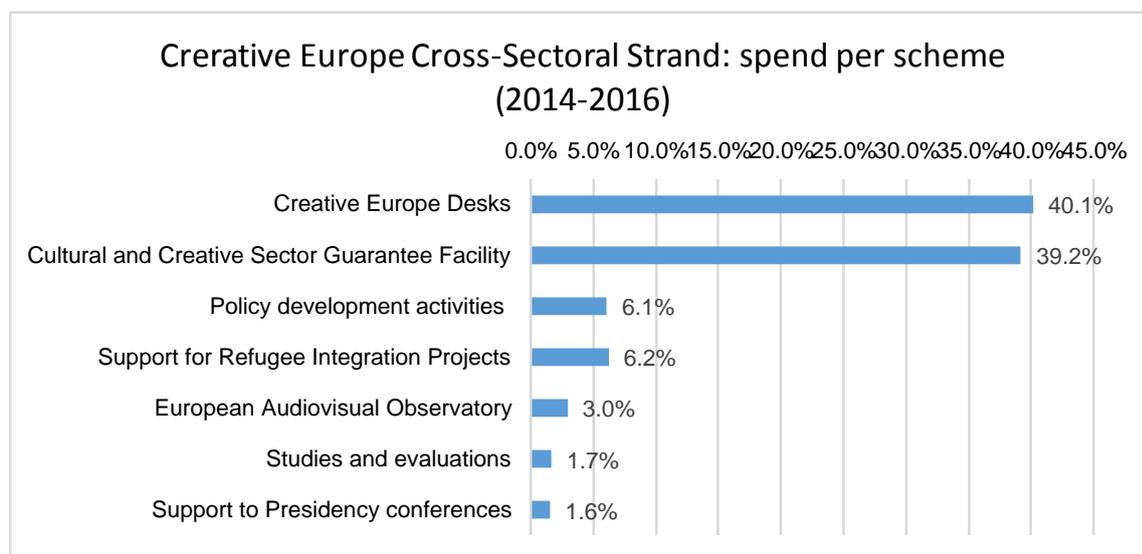
As evidenced in Table 8 and Figure 3 below, overall, so far €38 million have been spent (or, in the case of the Guarantee Facility, earmarked) across the various schemes of the Cross-Sectoral strand – again highlighting its small size compared to the current MEDIA and Culture Sub-Programmes (€327m and €179m spend so far).

The table and graph furthermore highlight the substantial proportion of the strand's budget going to two key schemes: Creative Europe Desks and the Guarantee Facility so far together make up 80 percent of the total spend allocated under the strand, thus leaving only 20 percent (around €7.8 million) for the remaining seven schemes.

Table 8. Creative Europe Cross-Sectoral Strand: Supported schemes and spend per scheme

Cross-Sectoral Strand	Total spent (2014-2016)	% of total budget
Communication and valorisation activities	610,000	1.6%
Creative Europe Desks	15,156,378	40.1%
Cultural and Creative Sector Guarantee Facility	14,800,000	39.2%
European Audiovisual Observatory	1,114,886	3.0%
Organisation of the STARTS Prize	200,000	0.5%
Policy development activities (peer learning, structured dialogue, support to innovation in the CCS)	2,304,299	6.1%
Studies and evaluations	635,031	1.7%
Support for Refugee Integration Projects	2,352,965	6.2%
Support to Presidency conferences	593,211	1.6%
TOTAL	37,766,771	100%

Figure 3. Comparison between Culture 2007 and Creative Europe Culture Sub-programme: spend per scheme



There are some gaps in the analysis. In particular, the performance of the industry in terms of distribution and audiences for non-national films is not discussed.

2 Methodological approach

2.1 Objectives of the evaluation and study design

This evaluation concerns four programmes. It provides a mid-term evaluation of the current Creative Europe Programme 2014-2020 and ex-post evaluations of the three predecessor programmes: Culture programme 2007-2013, MEDIA programme 2007-2013 and MEDIA Mundus 2011-2013.

The evaluation covers the period from 2007 to 2016.

2.1.1 Objectives of the evaluation

The purpose of this evaluation is to assess:

- The effectiveness of measures implemented under the four programmes, against the programme objectives, including the overarching EU targets, priorities and objectives¹³⁵;
- The long-term results of the Culture programme, MEDIA programme and MEDIA Mundus, including the impacts resulting from cumulative support to actions continued under the current Creative Europe programme;
- The sustainability of activities and elements of the programme, including the potential further development of actions and/or scope for simplification;
- The efficiency and cost-effectiveness of the measures supported by the programmes;
- The EU added value of the programmes in terms of promoting transnational cooperation in CCS and contributing to citizens knowledge of other European cultures, promotion of cooperation among CCS players simulating long-term responses their key challenges, fostering economies of scale and critical mass, creating leverage effect for additional funds and ensuring a more level playing field in European CCS;
- The programmes' internal and external coherence, including complementarities between the actions supported, current programme fields and other EU funding instruments; and
- The continued relevance of the Creative Europe Programme's general and specific objectives against current needs and problems faced by the creative and audiovisual (AV) industries.

The evaluation also develops recommendations on the monitoring mechanism and key performance indicators¹³⁶ for the Programme.

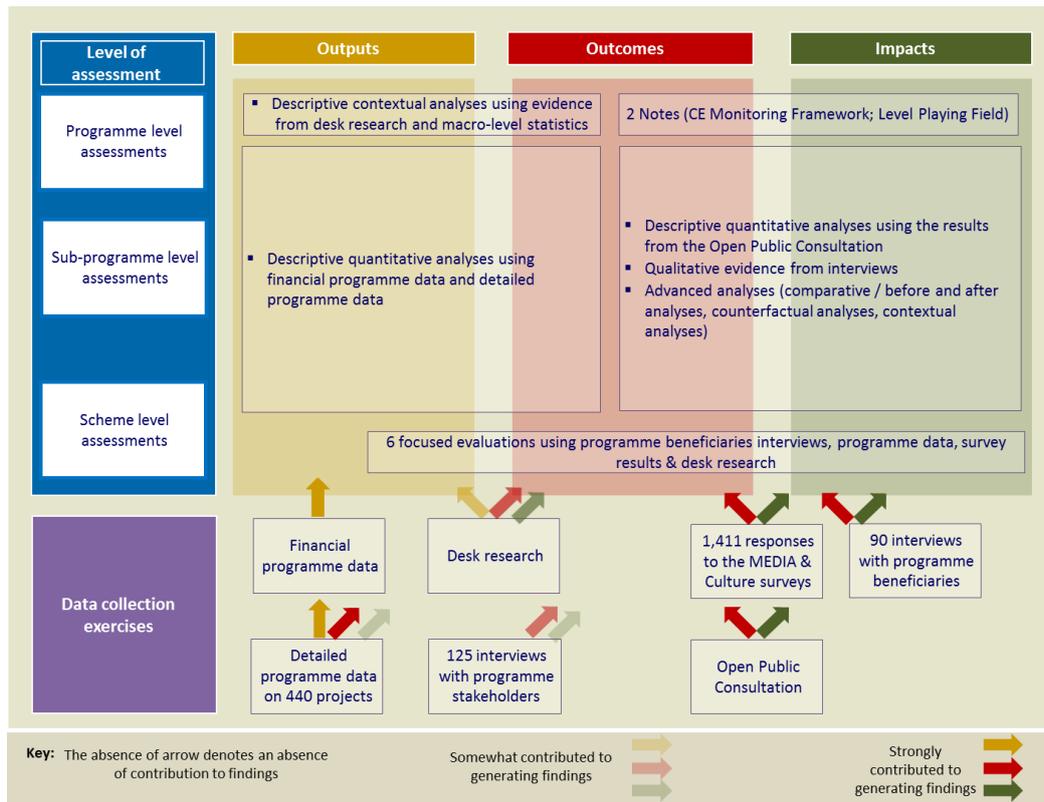
2.2 Study design and key deliverables

The methodological approach to this evaluation combined a variety of data collection and assessment methods. The approach is summarised in Figure 4.

¹³⁵ The programme actions were evaluated against the programme objectives. The relevance, coherence and contribution of the programme actions' Europe 2020 headline targets (employment rate of 75 percent, reduction of social exclusion), the relevant EC priorities (1, 2, 4, 8 and 9), policy areas of the Digital Single Market strategy and the strategic objectives of the European Agenda for Culture were also assessed.

¹³⁶ Ideally these should be matching those listed under Article 18 of the Regulation establishing the Creative Europe Programme. However, the quality and feasibility of these indicators has been put in question by the research and consultations undertaken during the inception stage of the evaluation.

Figure 4. Method of approach for the evaluation



The data collection exercises are briefly described below.

- **Financial and detailed programme data** collection and analyses included the collection, structuring, review and analysis of data from programme databases and documentation¹³⁷. Basic data was collected on the projects supported by Creative Europe from 2014 to 2016. Basic data in relation to applications received¹³⁸ was also collected for the entire evaluation period (2007-2016)¹³⁹. Collection and analysis of detailed project data was also completed with 440 projects' reports. They have mostly informed the assessment of programmes and sub-programmes' outputs and outcomes.
- **Desk research and retrieval of contextual data** have been undertaken continuously and up to the final stages of the evaluation. Contextual data were used, where appropriate, to compare programme performance with market performance. The key sources reviewed and used in the analysis included data collected by the European Audiovisual Observatory (EAO), Eurostat and Federation of European Publishers' Annual Statistics as well as other surveys (e.g. Eurobarometer), reports and studies. They have mostly informed the population of contextual indicators and hence the assessment of programmes and sub-programmes' outcomes and impacts.
- **20 scoping interviews and 103 key informant interviews** were carried out with key programme stakeholders of the current and predecessor programmes,

¹³⁷ From the Regulation and Decisions establishing the programmes, annual work programmes, MEDIA implementation reports, interim evaluations of predecessor programmes, impact assessment for establishing the current programme, and various other data and documents on outputs of the various programmes and schemes.

¹³⁸ This primarily focused on the 10 key schemes supported by the programmes, included in the scope of the MEDIA and Culture focused evaluations.

¹³⁹ Basic programme data was also received on MEDIA Mundus activities supported in 2011, completing this data collection request.

including interviews with national policy makers, sector organisations, funding bodies and Creative Europe Desks (CEDs), programme managers and EU-level sub-sector representing organisations as well as international institutions. They have mostly informed the assessment of the outcomes and impacts generated by the programmes via the perceptions of stakeholders¹⁴⁰.

- **90 interviews** were carried out with projects beneficiaries, unsuccessful applicants and scheme lead contacts at the EC and EACEA in the context of the Focused Evaluations. They have mostly informed the focused evaluation and the assessment of the performance of the schemes in generating outcomes and impacts.
- **MEDIA and Culture surveys** were conducted among the beneficiaries of MEDIA and Culture programme fields (i.e. projects supported by the current and predecessor programmes). A total of 1,411 complete responses to the surveys were received across the MEDIA and Culture programme fields (605 complete responses¹⁴¹ and 806 complete responses respectively¹⁴²). They have mostly informed the assessment of the outcomes and impacts generated at programme, sub-programme and to a lesser extent scheme level.
- **Six focused evaluations (FEs)** covered a total of 10 key schemes under MEDIA and Culture programme fields, assessing the performance of these schemes across the six evaluation criteria and six sectors (i.e. distribution, development and TV production for MEDIA and cooperation, networks and platforms, as well as literary translation for Culture). The methodologies for the FEs included a review of the data collected through all the above listed data collection exercises and 13 additional interviews with EACEA and EC officers managing the schemes as well as counterfactual analyses of data on 70 supported projects and 30 rejected applicants' case studies¹⁴³. They have provided in-depth insights into the performance of the scheme by enabling comparative and counterfactual analyses.
- **The Open public consultation (OPC) on Creative Europe** was launched on 23 January 2017 and remained open for a period of 13 weeks. A total of 547 contributions were received. The OPC has mostly informed the assessment of the outcomes and impacts generated at the Programme and sub-programme levels.
- **A proposal for a future Programme Monitoring Framework (PMF)** has been developed for the Creative Europe Programme.
- **A review of the level playing field (LPF) provisions** of the MEDIA Sub-programme led to recommendations on the positive discrimination aspects of Creative Europe.

2.3 Key challenges and how these were addressed

The following challenges were encountered and addressed in the context of this study:

- Access to programme data. Financial data was readily available for the predecessor programmes and the Creative Europe programme but limited in terms

¹⁴⁰ The confidentiality of the responses of the interviewees were guaranteed by the contractor and meant that they could freely express their views. Triangulation of opinion-based responses increased the robustness of findings.

¹⁴¹ In addition, 139 partial responses were recorded to MEDIA survey. Partial response is recorded when a respondent started filling in the survey but did not submit it. The MEDIA Survey achieved a 22.2 percent response rate. The first invitation to participate in MEDIA survey was sent to 2727 valid email addresses (478 were not valid). Two consecutive reminders were sent to those beneficiaries that had not provided their responses by mid-way and week before the closing date of the survey.

¹⁴² The first invitation to take part in Culture survey was sent to 4378 valid email addresses (427 were not valid). Two consecutive reminders were sent to those beneficiaries that had not provided their responses by mid-way and week before the closing date of the survey. In addition, 222 partial responses were recorded to Culture survey. Partial response is recorded when a respondent started filling in the survey but did not submit it. The Culture survey achieved an 18.4 percent response rate.

¹⁴³ The applicants that remained just under the selection threshold were to be used as a control group for the counterfactual analysis.

of the description of the programmes' outputs. Project level data on outputs (e.g. number of works produced) was readily available, while information related to projects outcomes and impacts was not. Detailed programme data was therefore extracted on a sample of 440 project reports. Such data have been aggregated to inform the scheme level as well as programme level performance assessment in terms of the programme outcomes and impacts.

- Access to contextual data. Contextual data¹⁴⁴ was only available for specific macro-level indicators and/or specific sectors. When no EU-wide comparative source was available the evaluators relied on specific studies at EU and/or national level as well as on proxy indicators so as to put the performance of Creative Europe and predecessor programme into perspective.
- Access to stakeholders. A few knowledgeable stakeholders in small Member States could not be interviewed due to the relatively distant object of the evaluation and lack of like-for-like replacement. Efforts were made to contact and interview 'unresponsive' organisations, with limited success. More interviews were conducted in similar Member States and sector organisations where possible.
- Extent of the coverage of the object of the evaluation. For instance, the terms of reference included 71 evaluation questions that covered the different levels and period of the programmes and the schemes to varying degrees. For primary research exercises, this led to the drafting of long survey and interview questionnaires and to some of the questions receiving a limited number of answers. When faced by limited evidence, other sources of information were used and triangulated to arrive at robust findings. For advanced analytical exercises (e.g. six focused evaluations), this meant relying on sampling techniques to generate the required findings.

2.4 Strengths and limitations of the method

The evaluation method as implemented has the following strengths:

- The two surveys of beneficiaries have been very well received and achieved¹⁴⁵ a reasonable response rate (above 20 percent when invalid email addresses were removed). However, a low response rate was received in relation to MEDIA Mundus programme beneficiaries;
- The stakeholder interviews delivered in-depth insights into Programme and Sub-programme performance. The wealth of qualitative information gathered enabled survey findings to be substantiated and provided findings on specific sub-sector and/or scheme performance;
- Programme data were analysed and additional interviews undertaken¹⁴⁶ to inform the Focused Evaluations. This enabled the evaluator to further triangulate Programme and surveys' data gathered¹⁴⁷ with additional evidence.

¹⁴⁴ For instance, macro-level indicators such as employment in or the amounts of public subsidies targeting the creative and cultural sectors.

¹⁴⁵ Based on the positive comments to the closing questions provided by both surveys and the lack of critical comments to the open-ended questions of the survey (usually if respondents are frustrated with the survey design they do not hesitate to comment on shortcomings of the survey design in relation to specific questions) and also through technical advice provided through the dedicated email account for any survey-related enquires.

¹⁴⁶ Five interviews were scheduled and undertaken in the process of developing the LPF note and further four in relation to the PMF note. In addition, the relevant data from the key informant interviews was used to inform these notes.

¹⁴⁷ It also helped to assess gaps in the Programme data (in relation to these notes these mostly relate to 2016 data that is currently in the process of being made available by EACEA) as well as with the identification of the relevant external data sets that will be of particular relevance for the FEs and the rest of the reporting under this assignment.

The evaluation method as implemented has the following weaknesses (measures for addressing these weaknesses are presented after the description of each methodological limitation):

- The survey of beneficiaries may suffer from a positive bias across all stakeholder types. This is typical and inherent to all surveys. Some MEDIA and Culture surveys' questions were similar to the survey undertaken by the CEDs. ICF survey of beneficiaries led to similar level of positive responses (albeit a bit lower). The slight positive bias has been acknowledged in the analysis of survey results. Triangulation with other sources of data helped in correcting the stakeholder bias.
- The respondents to the MEDIA survey who benefited from the Development schemes are overrepresented as a share of all respondents if compared to the share of all funding allocated for development schemes in relation to total MEDIA funding. The overrepresentation of beneficiaries of the 'Development Schemes' in the MEDIA survey is more pronounced in relation to the predecessor Programme than in relation to the current programme. Such bias was not evidenced for specific MEDIA schemes other than the development schemes. The extent to which this influences the findings was assessed by weighting the responses by groups of beneficiaries and examining the possible bias caused by the overrepresentation. This led to a reduction of positive responses to the MEDIA survey by two percentage points which would not change the overall nature of the findings from the survey.
- Primary research exercises mostly targeted the programme stakeholders – i.e. the supply side of the creative and cultural sectors. The perceptions and opinions of stakeholders on the "demand side" were mainly captured by the Open Public Consultation¹⁴⁸. Additional interviews were also scheduled and partly run with two representative organisations¹⁴⁹; one later declined to partake in the interview.
- Relying on a sample of projects to extract programme data exposes the research design to potential sampling biases. This was an issue as very small samples were used for some of the Focused Evaluations. Analyses relying on small samples have been reported as "illustrative examples" supporting more robust findings. They themselves are never presented as robust findings in the report.

Comparative analyses were undertaken based on like-for like comparisons, to the extent this is possible. The context within which the programmes were implemented has by some extent been taken into account. For instance, comparing the first three years of the predecessor programmes to the first three years of Creative Europe would have led to different results than comparing "average" performance across the two programming periods. Nevertheless, comparative analyses based on like-for-like comparisons provide useful insights into the performance of the programmes, especially when accompanied by a narrative on the context of implementation and/or an account of the main differences.

¹⁴⁸ The evaluation team promoted the OPC to the relevant consumer and citizen organisations and associations to fill this gap. If they chose to use this opportunity to provide their positions in the framework of the OPC, these will be given proper attention in the analysis included in the Final report.

¹⁴⁹ Europa Nostra' citizens' movement for the safeguarding of Europe's cultural and natural heritage (supported under Networks scheme) and the European Association for Viewer's Interests (EAVI).

3 Findings

This section presents the findings of the study, organised, as required by the Tender Specifications, around six evaluation criteria and covering the predecessor and current programmes, in line with the scope of the evaluation questions (presented in footnotes to the respective headings).

3.1 Relevance

This evaluation criterion relates to a series of questions¹⁵⁰ examining the relevance of the current and previous programmes in terms of:

- Responding to the main challenges of the CCS over the past ten years, especially digitalisation and increasing global competition (subsection 3.1.1)
- Responding to the ongoing and emerging needs of the CCS over the past ten years, also as part of the response to both the constant and new challenges faced by the sector (subsections 3.1.2.1 and 3.1.2.2)
- Responding to the changing priorities within the CCS over the last ten years resulting from these contextual evolutions with regard to challenges and needs (subsection 3.1.2.3)
- Factoring in and influencing policy developments at the EU and national level to ensure continuing relevant support for the CCS (subsections 3.1.2.4 and 3.1.2.5)

Finally, this evaluation criterion also poses the question of what changes could be envisaged to improve the relevance of Creative Europe and its successor programmes for the CCS (subsection 3.1.3).

The subsections that follow deal with each these questions one by one, primarily by analysing the schemes and actions of the current and previous programmes – and comparing them respectively, where appropriate. The overarching objectives of the programmes¹⁵¹ are occasionally referred to as reminders of the rationale behind the relevance of the schemes and actions to the CCS. The focus of this analysis of “relevance” is thus firstly on the contents, and secondly on the intents of the programmes.

3.1.1 Creative Europe addresses the key challenges of the cultural and creative sectors¹⁵²

Access to public and private funding is the one major challenge for the CCS, especially in the context of increased competition brought about by globalisation and the digital shift (see Section 1.2).

With adequate support from the Programme, CCS beneficiaries across Europe can take action in response to the digital shift and showcase their work internationally in the spirit of cultural diversity, particularly through innovation and the development of new business models enhancing their competitiveness.

Furthermore, the Cultural and Creative Sector Guarantee Facility (CCS GF) is seen by financial intermediaries as an opportunity to enter the sector and/or to develop existing lines of business at a lower risk, ultimately leading to better access to finance for CCS

¹⁵⁰ These questions all form part of the evaluation framework designed at the inception stage of this study to guide the research.

¹⁵¹ See Section 1.6 for a comprehensive description of the objectives of Creative Europe and its predecessor programmes.

¹⁵² This section covers Evaluation Question 1: To what extent has Creative Europe responded to the main challenges facing the audiovisual and culture sectors, namely the digital shift and the impact of globalisation?

entities and the development of their capacity in the medium to long term, thus potentially generating growth and employment overall¹⁵³.

Other challenges include the fragmented markets of the creative and culture sector, in part due to the linguistic and cultural diversity within the EU.

The following subsections report on how Creative Europe is addressing the key challenges faced by CCS entities.

3.1.1.1 Creative Europe provides relevant support in response to the intensification of digitalisation and globalisation in the AV sector

Creative Europe's MEDIA Sub-programme priorities are relevant in addressing the challenges and needs of European AV operators¹⁵⁴.

The increasing dominance of digital technologies in the past ten years has prompted restructuring and adjustments across the entire value chain of the AV sector. This is particularly the case regarding cinema, with a reduction in the number of independent screens and the growth of online VOD (including streaming and downloads) challenging more traditional (or material) forms of distribution¹⁵⁵. Creative Europe funding contributes to address the challenges related to the digital shift – especially its online distribution scheme. Digital technologies have facilitated the distribution of content across borders, thanks to online platforms such as catch-up TV and video on-demand (VOD). The resources allocated to this scheme in 2017¹⁵⁶ have almost doubled, showing the growing emphasis placed by the Programme in this area.

At the same time, digitalisation has also intensified competition on a global scale whilst putting European AV creativity to the test. This is where Creative Europe schemes, such as Television Programming, are highly relevant; they support innovative European AV operators to establish themselves on the global market by promoting high-quality original content that appeals to audiences both across the European Union and globally¹⁵⁷.

3.1.1.2 Creative Europe has strengthened its support for innovation and audience development in light of changing cultural consumption trends

The digital shift and associated new modes of consumption of cultural and creative works constitute a challenge for more traditional forms of cultural entertainment (e.g. theatre or music concerts). This is true for small operators who are contending with and are being pressed to adapt their offer to new technologies (e.g. streaming) to attract new audiences¹⁵⁸. The emergence of new technologies also challenges publishers' business models to ensure that reading continues to be a regular activity for educational, personal development or more simply entertainment purposes¹⁵⁹. Likewise, digitalisation has challenged the music industry to transform its production and distribution channels significantly with the decline of physical sales¹⁶⁰.

¹⁵³ According to the AV stakeholders interviewed and more than half of the respondents to the cultural stakeholder survey

¹⁵⁴ This statement is supported by 95 percent of the AV stakeholders surveyed for this study.

¹⁵⁵ Josef Wutz, Dissemination of European Cinema in the European Union and the International Market (Notre Europe, 2014), 22; European Audiovisual Observatory (2015) Trends in Video-on-Demand Revenues

¹⁵⁶ The scheme has been renamed Promotion of European Works Online (Creative Europe AWP 2017)

¹⁵⁷ Creative Europe – "Media: Implementation, first experiences" (European Parliament, 2016)

¹⁵⁸ See "From Live-to-Digital: Understanding the Impact of Digital Developments in Theatre on Audiences, Production and Distribution", AEA Consulting, October 2016

¹⁵⁹ See 'From publishers to self-publishing: The disruptive effects of digitalisation on the book industry', CREATE Working Paper 2017/06 (March 2017)

¹⁶⁰ See 'Statistical, Ecosystems and Competitiveness Analysis of the Media and Content Industries: The Music Industry', Joint Research Centre (JRC) report 2012

In light of this, stakeholders consulted considered the priorities of Creative Europe relevant in addressing the challenges of their sector¹⁶¹. More specifically, many cultural stakeholders note that some of the schemes introduced or revamped under Creative Europe – particularly European Platforms and European Networks – are relevant in addressing the challenges brought about by the digital shift.

Many see the support provided by Creative Europe as relevant for developing innovative approaches to transnational cultural participation and audience development (e.g. online art competitions across borders, online streaming of music or theatre performances)¹⁶². Stakeholders also recognise the relevance of the European Networks scheme in incentivising the development of new business models¹⁶³.

Many also acknowledge that the European Platforms scheme is relevant for cross-border networking activities and for the development of the sector by improving the visibility of emerging talents while preserving the diversity of cultural content creation across Europe. Additionally, while being geared towards supporting the growth of very specific or innovative forms of artistic creation, this scheme is also relevant to Creative Europe's wider audience development objective¹⁶⁴.

3.1.2 Creative Europe responds to both the ongoing and emerging needs of the AV and Culture sectors¹⁶⁵

With the development of the cultural and creative industries over the past ten years, many additional needs have emerged especially in a context characterised by increased competitiveness and globalisation. Emerging needs have overall been captured and partially addressed by Creative Europe building on lessons learned from the 2007-2013 MEDIA and Culture Programmes.

3.1.2.1 Creative Europe continues to address the ongoing needs of the European CCS, and even more so than the previous programmes thanks to its 'business-oriented' dimension

Capacity building, professionalisation and audience development are the AV sector's main ongoing needs¹⁶⁶

Support for single projects and slate funding continues to respond well to the needs of the industry both in terms of project development and their capacity to operate across borders¹⁶⁷. The relevance of this scheme, which has remained relatively unchanged under both MEDIA 2007-2013 and Creative Europe, has proved to be even greater in high production capacity countries where public subsidies to the AV industries have decreased in recent years¹⁶⁸.

¹⁶¹ 92 percent of the cultural stakeholders surveyed as part of the survey on Creative Europe Culture Sub-programme beneficiaries agree that the priorities of the programme are relevant (ICF Research)

¹⁶² "Creating growth – measuring cultural and creative markets in the EU", EY (2014). Further evidence provided in stakeholder interviews with project examples: Europe-wide Opera platform and the Cryptic Art House

¹⁶³ Creative Europe – "Culture Sub-programme: first experiences with the implementation of the new programme" (European Parliament 2016)

¹⁶⁴ Indeed, 67 percent of the Culture survey respondents agreed that this particular scheme added considerable value to the Creative Europe programme. See Focused Evaluation No.5 on Networks and Platforms for further details

¹⁶⁵ This section covers Evaluation Question 2: To what extent are the needs of stakeholders in the Audiovisual and culture sectors addressed by the Creative Europe programme?

¹⁶⁶ Conclusion emerging from the review of stakeholder consultation/interview results

¹⁶⁷ Almost all AV stakeholders taking part in this study, as well as in the OPC on Creative Europe (+90 percent), supported the statement.

¹⁶⁸ Italy and Spain. See Focused Evaluation No. 2 on Development projects and Single slate funding for further details

AV stakeholders overall recognised the ongoing need for training, particularly on new technologies in a sector often characterised by the lack of formal qualifications among its workers¹⁶⁹. They consider that Creative Europe enables them to access digital training in a way that is particularly beneficial to micro-enterprises¹⁷⁰. Creative Europe now better responds to the professionalisation needs of the European AV sector than the predecessor programmes¹⁷¹.

Creative Europe MEDIA Sub-programme's focus on audience development is highly relevant to AV sector needs, particularly in a context of globalisation¹⁷². Most programme stakeholders appreciate Creative Europe's recognition of the importance of outreach work (i.e. film literacy and promotional events), notably by using innovative and modern communication formats to attract younger audiences¹⁷³. They have also highlighted improvements under Creative Europe in terms of promoting Europe's linguistic and cultural diversity, particularly thanks to its TV programming scheme supporting the development of original and creative content suited to consumer preferences¹⁷⁴.

Access to finance and audience development are the cultural sector's main ongoing needs.¹⁷⁵

Creative Europe's priority on access to finance is extremely relevant to a sector composed mainly of micro, small and medium enterprises and partly reliant on public funds. The financial crisis in the years 2008 to 2010 has put a strain on public finances with ripple effect on the availability of national funding for the CCS sector. Creative Europe seek to realise the growth and employment potential in the sector¹⁷⁶.

Creative Europe's various schemes play a critical role, in terms of supporting transnational cultural exchanges (e.g. Cooperation projects), the visibility of emerging art forms and artists (e.g. Platforms) and cultural players' growth ambitions (e.g. Networks).

Cooperation projects have continued to bring high value across both the previous and current programmes, generating strong and complementary partnerships that last beyond projects as well as motivation for promoting cultural outputs to wider audiences¹⁷⁷. Good planning and realistic projects is also an appreciated feature of the Cooperation scheme¹⁷⁸. This also highlights improvements under Creative Europe compared to Culture 2007-2013 in making cross-border cooperation objectives sharper on certain aspects such as skills development and capacity building¹⁷⁹.

Cultural stakeholders welcomed the major improvements undertaken under Creative Europe compared to the previous programme in terms of addressing the audience development needs of the sector¹⁸⁰. Today, Creative Europe is seen as very relevant in

¹⁶⁹ This finding resulting from the interviews for this study is also confirmed in the evaluation "Contribution of the Creative Europe Programme to fostering Creativity and Skills Development in the Audiovisual Sector"

¹⁷⁰ Contribution of Creative Europe to fostering Creativity and Skills Development in the EU AV sector (CSES & IDEA Consult, 2017). Observation also made by AV stakeholders interviewed for this study.

¹⁷¹ This was also confirmed by 86 percent of the respondents to the OPC,

¹⁷² This was confirmed by 90 percent of AV stakeholders taking part in the OPC.

¹⁷³ This was confirmed by 92.5 percent of AV stakeholders taking part in the OPC

¹⁷⁴ Recurrent response among CEDs and national-level policy stakeholders, relaying the views of the AV industry

¹⁷⁵ Conclusion emerging from the review of stakeholder consultation/interview results

¹⁷⁶ This was confirmed by 70 percent of cultural stakeholders taking part in the OPC.

¹⁷⁷ Creative Europe – "Culture Sub-programme: first experiences with the implementation of the new programme" (European Parliament 2016)

¹⁷⁸ Ibid

¹⁷⁹ Scoping interviews with EACEA and DG EAC officials. Review of programme documentation Culture 2007-2013 also reveals that Cooperation project objectives were primarily focused on encouraging the emergence of a sense of European citizenship.

¹⁸⁰ According to CEDs interviewed

terms of stimulating interest and improving access to European cultural works¹⁸¹. The European Platforms scheme is particularly relevant in supporting emerging artists and can effectively contribute to cross-border networking with its process-oriented focus¹⁸².

The Literary Translation scheme has remained very popular and of high relevance to publishers in smaller countries, allowing them to translate a wide diversity of works of high literary quality into their languages while lowering their financial risk. For publishers operating in larger countries, the low number of applications suggests that the scheme is of lesser relevance¹⁸³. Programme stakeholders also noted that Creative Europe better supported the circulation of European Literature than the previous programme¹⁸⁴.

3.1.2.2 Relevance of Creative Europe to emerging needs

The rapid growth of the digital economy over the last ten years has accentuated the need for modernisation/innovation and technical know-how support within the European CCS.

Creative Europe's MEDIA Sub-programme is relevant in contributing to the sector's digitalisation and modernisation needs so as to be competitive in an increasingly globalised AV market¹⁸⁵.

In acknowledging the change in AV consumption patterns brought about by the digital shift, AV stakeholders generally appreciated the wider scope of support under the Online Distribution scheme of Creative Europe for the development of new business models. By valuing innovative and experimental projects in this changing environment, the MEDIA strand of Creative Europe is thus responding to the support needed by the AV industry to remain competitive.

An effort was made with Creative Europe to address the needs of the video game industry in Europe. There is some appreciation among industry representatives that the MEDIA Sub-programme's focus on innovation and creativity in video gaming can effectively stimulate a healthy competition and open the way for start-ups to establish themselves and develop their capacity.

While the need for professionalisation in the culture sector remains strong, the wider scope of the training offer under **Creative Europe's Culture Sub-programme** – with a focus on technical skills and innovation – clearly responds to the need for cultural players to fully embrace the digital shift. As a result, there is recognition among cultural stakeholders that training interventions under the current programme are more relevant than previously in enabling them to further develop and build on their project management skills (i.e. programme planning, implementation and evaluation). The current European networks scheme is deemed particularly relevant in this regard – by supporting transnational partnerships among European cultural players through the development of new skills and business models, this scheme can potentially generate

¹⁸¹ From the OPC

¹⁸² Creative Europe – “Culture Sub-programme: first experiences with the implementation of the new programme”, European Parliament 2016

¹⁸³ Only 14 percent of Literary Translation two-year project applications came from DE, ES, FR, UK in 2016 (http://eacea.ec.europa.eu/creative-europe/selection-results/literary-translation-projects-2016_en). Observation also made in scoping interviews and interviews with CEDs.

¹⁸⁴ The results of the OPC show that among the 70 percent of cultural stakeholders who deem Creative Europe as relevant in terms of supporting the circulation of European literature, more than half among them noted some major improvements compared to the previous programme.

¹⁸⁵ 90.2 percent of the respondents to the Creative Europe MEDIA Sub-programme survey (ICF Research)

structuring effects (i.e. ensure the long-term sustainability of transnational partnerships).¹⁸⁶.

Overall, the focus of the Culture Sub-programme on 'marketable' skills (e.g. digital training) and support to audience development is considered to meet the needs of cultural operators, despite the impression among some of them that the programme's emphasis on 'growth and jobs' could be detrimental to priorities such as cultural diversity and intercultural dialogue¹⁸⁷. Cultural stakeholders nevertheless appreciate the programme's innovative approach to audience development and the scope of training courses offered.

3.1.2.3 How Creative Europe responds to changing sector priorities¹⁸⁸

Creative Europe appears to be relevant in addressing the changing priorities of the CCS, i.e. staying abreast of sectoral developments and becoming more competitive on a European scale as well as internationally¹⁸⁹. It clearly acknowledges that the democratisation of digital technologies represents an opportunity to enable the European CCS to grow in an increasingly globalised market.

The new schemes under the MEDIA Sub-programme of Creative Europe clearly reflect evolutions in the AV sector with the development of digitalisation. Interactive projects, previously supported separately under MEDIA 2007-2013, are now integrated under Creative Europe's MEDIA Development schemes, thus multiplying opportunities for the development of trans-media projects. Video game development has been introduced under Creative Europe following growing interest from video games developers in EU funding, which recognises the growth and creative potential of this subsector.

With the intensification of AV market globalisation, access to third country markets in the AV sector is no longer treated separately under Creative Europe's MEDIA Sub-programme as it was during the previous programming period with MEDIA Mundus. Professionalisation now has a more global dimension with the possibility for up to 20 percent of non-EU professionals to take part in training activities supported by the MEDIA Sub-programme¹⁹⁰. Stakeholders overall appreciate the approach of making third country cooperation more of a cross-cutting objective supported by various schemes, such as access to markets and international co-production funds¹⁹¹.

Regarding the Culture Sub-programme, stakeholders see the introduction of the European networks scheme as more relevant than the generic operational grants of the previous programme. The European networks scheme offers cultural sub-sectors a framework to develop the skills and business models needed to remain competitive in the digital economy. They also consider Creative Europe critical when responding to the

¹⁸⁶ 95 percent of the European Networks beneficiaries surveyed find the scheme relevant in responding to the cultural sector's changing needs in the digital age (57 percent of them find the scheme 'extremely relevant with no need for adjustment'; a further 38 percent of them find the scheme 'relevant, but some adjustment would be beneficial'.)

¹⁸⁷ "Creative Europe programme analysis and recommendations" (Culture Action Europe, 2016). Observation also frequently made by cultural stakeholders interviewed for this study.

¹⁸⁸ This section covers Evaluation Question 6: To what extent have the programmes' objectives and actions remained relevant to evolving sector priorities?

¹⁸⁹ The OPC revealed that 71 percent of all participating stakeholders see the programme as largely relevant to enhancing the competitiveness of the CCS.

¹⁹⁰ Available programme data shows around 15 percent of professionals from non-Creative Europe countries have participated in such training compared to only 1-2 percent under the previous programme.

¹⁹¹ Interviews with AV sector associations and CEDs. Certain national-level AV stakeholders however regret that the reciprocity-based approach under MEDIA Mundus, which opened third-country markets to EU professionals and vice versa, no longer features under Creative Europe.

necessity of increasing the transnational and international circulation of European cultural and creative works¹⁹².

The previous Culture programme's specific action for cooperation with third countries has been discontinued under Creative Europe and directly incorporated in the across the key schemes of Creative Europe's Culture Sub-programme¹⁹³ to better suit the internationalisation aspirations of cultural operators¹⁹⁴. In light of these evolutions, there may be scope for further consolidating and expanding cooperation with third-countries in the future. The available programme data shows that only around 2 percent of partners taking part in Creative Europe Culture Sub-programme schemes have come from countries outside the EU/EFTA.

3.1.2.4 Creative Europe is relevant to the strategies pursued by the Member States¹⁹⁵

National policy priorities are mostly aligned with those of Creative Europe. Overall, the programme is mostly relevant to the policies pursued in their respective countries¹⁹⁶.

Most national strategies aim to ensure the creative sectors are skilled, resourceful and innovative in the digital era while recognising the contribution they potentially make to the economy¹⁹⁷. As such, the strategies pursued at the national level are relevant to EU policy objectives emphasising innovation and inclusion to foster jobs and growth in the CCS (e.g. Europe 2020).

At the same time, national funding schemes have been operating with reduced resources as a result of budget cuts in a number of Member States. Only two EU Member States have increased their CCS funding as a share of GDP post-2008, while 12 have reduced funding and 14 have remained stable¹⁹⁸. This has led in some cases to a reorientation of priorities in certain countries with a stronger focus on enhancing the financial independence of operators in the CCS, notably through the concept of cultural entrepreneurship¹⁹⁹. This reorientation mirrors the rationale and objectives of Creative Europe's Culture schemes, which are more geared towards capacity building and the development of new business models compared to those of Culture 2007-2013.

Elsewhere, the tax incentives offered in some Member States to attract foreign investments and enhance the viability of national AV operators in an increasingly competitive global environment are both relevant and complementary to Creative

¹⁹² Out of all the CCS stakeholders taking part in the OPC, 87 percent agree that Creative Europe is relevant in terms of making the most of globalisation to increase the transnational circulation of European cultural and creative works.

¹⁹³ Cultural operators have the possibility to allocate up to 30 percent of the grant they obtained for a cooperation project for activities with third countries.

¹⁹⁴ As noted by EU officials and CEDs, the fact that (third-country) international projects only spanned a year under Culture 2007-2013 was an obstacle to the sustainability of projects with a capacity building focus

¹⁹⁵ This section covers Evaluation Question 5: To what extent are the Creative Europe programme objectives relevant to evolving policy priorities and socio-economic situations, particularly at the national level? – Issues around subsidiarity and complementarity are discussed in Section 3.2 on Coherence

¹⁹⁶ 60 percent of the respondents to the MEDIA survey, who benefited from the support of the current Programme, indicated that national funding opportunities/instruments for the audiovisual sector are 'fully complementary' to the support of the Creative Europe Programme, further 36 percent answered that they are 'partially complementary'. In relation to the Culture Sub-programme, these shares were 43 percent and 48 percent respectively. The high degree of complementarity was also confirmed by the OPC.

¹⁹⁷ This is based on the review of the current national strategies of DE, FR, IE, LT, NL, PT, SI

¹⁹⁸ Eurostat data (2009-2014): General government expenditure by function (COFOG – GF0802, 0803, 0806)

¹⁹⁹ From desk research, it can be said that this concept has recently grown in importance in the national cultural strategies of a number of countries: e.g. France, Germany, and the Netherlands. It also reflects a wider trend in policy towards recognising the value of social entrepreneurship and the social economy

Europe's financial support towards capacity-building and internationalisation prospects of the EU AV industry²⁰⁰.

3.1.2.5 Creative Europe continues to be fully relevant to EU policy priorities

Creative Europe is part of the 2014-2020 Multi-Annual Financial Framework designed to contribute to the delivery of the Europe 2020 strategy for smart, sustainable and inclusive growth²⁰¹. A wide range of policy and industry stakeholders have noted that the priorities of Creative Europe are highly relevant to those of Europe 2020 in terms of realising the potential of the CCS as drivers of innovation-driven growth and sustainable employment in the digital era²⁰². This also credits Creative Europe's explicit commitment to investing in skills and capacity building to support the consolidation of the AV and culture sectors in a fast-changing and globalised market environment²⁰³.

The evolution toward greater cross-over between the MEDIA and Culture strands under Creative Europe and its focus on supporting new business models speaks to the priorities of Horizon 2020 which emphasises the creative industries as an important area for research and innovation²⁰⁴. The rationale behind the integration of the MEDIA and Culture strands under Creative Europe was multifaceted: to facilitate policy synergies in the sectors concerned; and to produce knowledge and disseminate it between sectors with the potential to positively contribute to the objectives of the Europe 2020 strategy. This also implies the pooling of knowledge from different DGs, also allowing DG CNECT to ensure synergies with the Digital Single Market Strategy of 2015 which aims to ensure that the digital economy improves citizens' access to culture, entertainment and information²⁰⁵.

Similarly, the Commission is, under the programming period 2014-2020, leveraging Creative Europe as part of its recent plans to reform and modernise EU copyright rules to improve cross-border access to online content, develop new distribution channels for creators and facilitate the digitalisation and dissemination of cultural creative works²⁰⁶. Creative Europe schemes are also relevant to the Audiovisual Media Services Directive (AVMSD) proposal to increase the volume and prominence of European works in the online environment in keeping with the aim of global audience development, notably by offering economically advantageous opportunities for the distribution of high-quality works to wider and more diverse audiences²⁰⁷.

On another level, EU policy also underlines the importance of investing in culture to stimulate social cohesion, job creation and economic growth in regions and cities. Commission officials have highlighted that this priority is, under the programming period 2014-2020, clearly captured by the Creative Europe-funded European Capitals of Culture (ECoC) special action. Indeed, the 2014 ECoC Decision now requires cities to present a long-term cultural strategy when bidding for the title. On that basis, the Commission expects that cultural players in ECoC cities will be able to benefit from local authorities' strategic support over the longer term, both in terms of capacity-building and inter-city or cross-border networking.

²⁰⁰ Based on interviews with CEDs and national policy stakeholders, Member States include NL, NO, PT, UK

²⁰¹ See http://ec.europa.eu/culture/policy/strategic-framework/growth-jobs_en for further information

²⁰² National-level policy stakeholders as well as Commission officials in some instances agreed fully that there is a strong and visible connection between the objectives of Creative Europe and those of Europe 2020. A small number of AV/culture industry representatives also made this observation. Also based on the review of relevant programme documentation

²⁰³ Same as above

²⁰⁴ See Section 3.2 on Coherence for further details

²⁰⁵ [http://www.europarl.europa.eu/RegData/etudes/IDAN/2016/581413/EPRS_IDA\(2016\)581413_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/IDAN/2016/581413/EPRS_IDA(2016)581413_EN.pdf)

²⁰⁶ [http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM percent3A2015 percent3A626 percent3AFIN](http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM%2015%20percent3A626%20percent3AFIN)

²⁰⁷ See Focused Evaluation No.1 on Distribution schemes (pp. 9, 16, 24) for further details

Lastly, the schemes under the 2007-2013 MEDIA and Culture Programmes and Creative Europe continue to be relevant to the objective of preserving cultural heritage and diversity in Europe as well as promoting artistic creativity, in accordance with Article 167 TFEU and the 2005 UNESCO Convention respectively.

3.1.3 The schemes offered under Creative Europe are relevant to stakeholder needs but there is scope for improvement²⁰⁸

3.1.3.1 AV sector: four suggestions for improvement

The current MEDIA Sub-programme is highly relevant to the needs and objectives of the AV sector. Four main issues and suggestions for corrective action across some of the schemes have nevertheless emerged:

Distribution: reconciling financial viability with creative diversity

AV stakeholders view the distribution sector in Europe as fragile and therefore value Creative Europe's distribution schemes contribution to the support for the diversity of non-national films by reducing the level of risk involved and making them financially viable. Both the Cinema Automatic and Cinema Selective Schemes are seen as key in ensuring that a wide diversity European non-national films are distributed, promoted, and shown²⁰⁹. The vast majority of non-beneficiary industry stakeholders also share this opinion²¹⁰.

There was a reallocation of funding across the two distribution schemes at the start of Creative Europe, with resources transferred from Selective to Automatic²¹¹ and annual calls reduced from three to two under Selective. This change is also reflected when comparing the annual number or percentage of successful applications under the two distribution schemes across the current and previous programmes, with trends showing a rise for Automatic and a drop for Selective from 2014 onwards. At the same time, the average number of distributors per grouping has increased significantly under Selective²¹². This trend reveals that groupings of distributors have become larger in order to increase their chances of success, which suggests that the Selective scheme may have become more relevant to films with more commercial potential and a wider geographic reach. This also implies that films from new talent are less likely to attract large groupings and therefore less likely to succeed, which risks affecting the diversity of the films being distributed even if programme data shows relative stability across the previous and current programmes with respect to the share of films originating from high PCCs²¹³. In this context, some stakeholders suggest a review of the programme's Distribution funding priorities in relation to Cinema Selective, or that the scheme's award criteria should balance the track record of distributors in releasing arthouse works with support to new talent (particularly for the 25 percent of available funds aimed towards films of less than €3 million)²¹⁴.

Reconsidering scope for transmedia support in light of new modes of consumption

²⁰⁸ This section covers Evaluation Question 7: To what extent are the present schemes adequate to respond to the rapidly-changing needs of the sector and policy challenges? How should they be revised, streamlined or discontinued?

²⁰⁹ Creative Europe – "Media: Implementation, first experiences" (European Parliament, 2016)

²¹⁰ 89 percent of the respondents to the Open Public Consultation see the distribution schemes as relevant

²¹¹ From approx. €12.5m annually under MEDIA 2007-2013 to approx. €10m under Creative Europe

²¹² From 6.7 in the MEDIA Programme to 11.7 in Creative Europe, and the average number of distributors per successful film has increased from 8.6 in the MEDIA Programme to 15.8 in Creative Europe. See FE1 p36 for complete figures.

²¹³ Most recent data available is from 2014-15, i.e. first year of Creative Europe.

²¹⁴ See Focused Evaluation No.1 on Distribution schemes (p16) for further details

The rapid growth of VOD platforms in recent years is gradually affecting the strategic development of all AV players. The need to better support transmedia content has been deemed important by a significant number of AV stakeholders²¹⁵ to the effect that they have the potential to change collaborative dynamics within and across different AV subsectors (production, distribution, TV broadcasting)²¹⁶. In this context, renewed attempts under Creative Europe to support new business models linked to transmedia in light of changing AV consumption patterns are encouraged by most AV stakeholders²¹⁷ despite the fact previous experiences may not have been entirely convincing²¹⁸.

While Creative Europe allows the development of projects that can be exploited on TV, cinema or digital platforms, there is still a need to clarify activities eligible for funding. It is not clear if the definition of transmedia content would allow for funding of a transmedia project that is, for instance, intended to be partly broadcasted on TV and partly exploited online. The clearer the definition of eligible funding the higher the perceived relevance of the Development schemes would be when examining newest trends in digitalisation²¹⁹.

Regarding TV Programming, VOD players' role in future co-productions may have an impact on broadcasters' participation in Creative Europe. The presence and role of VODs in TV production is evolving and VOD providers have increasingly been considered as potential partners for independent producers. This evolution should be monitored, since, at this stage, it is not clear whether non-linear players will be in favour of partnering with linear broadcasters, thus limiting their rights in specific countries. Should this not be the case, the requirement of including at least three broadcasters for participating in the scheme may hinder producers to either develop partnerships with VOD entities or to apply to the scheme²²⁰.

Addressing the disparate effects of LPF provisions across Europe

Many of the AV stakeholders interviewed have discussed the relevance of the level playing field (LPF) provisions under Creative Europe. Those in the high PCCs have mentioned that the positive discrimination for low and medium PCCs further penalises micro-enterprises in the high PCCs. Others have noted that the criteria used to distinguish between low, medium and high PCCs (e.g. number of inhabitants, size of national market) may not entirely suffice to create a more level playing field. The current definition of capacity based solely on production, for example, does not capture the diversity of the European AV landscape²²¹. To improve the relevance of the LPF provisions, it has been suggested that criteria such as potential for circulation or distribution capacity be added²²². These views must be balanced with those of some of the beneficiaries surveyed, who appreciate the extra support Creative Europe provides to low and medium PCCs in a very competitive and globalised AV market²²³.

While they seem to have ensured a good success rate of applications from low and especially medium PCCs, LPF provisions are only linked to the applicant's country of

²¹⁵ Survey of Creative Europe AV stakeholders and programme beneficiaries and OPC (ICF Research)

²¹⁶ Creative Europe – "Media: Implementation, first experiences" (European Parliament, 2016)

²¹⁷ More than half (57.5 percent) of the surveyed AV stakeholders supported the statement. Survey of Creative Europe AV stakeholders and programme beneficiaries (ICF Research)

²¹⁸ E.g. under MEDIA 2007-2013 Development – Support for Interactive Works. The interim evaluation of MEDIA 2007 found that the effectiveness of this scheme could be improved. Evidence from scoping interviews with DG CNECT officials however suggests that there is a need for this kind of flexible support.

²¹⁹ See Focused Evaluation No.2 on Development schemes (p12-13) for further details

²²⁰ See Focused Evaluation No.3 on TV Programming (p18) for further details

²²¹ "Compromise proposal on level playing field measures", Report of the LPF WG meeting held on 17 January 2017

²²² Ibid

²²³ It is not possible to ascertain whether these beneficiaries come from those countries themselves. Nevertheless, almost half of the survey respondents overall had a positive opinion of the LPF provisions under Creative Europe. Source: Survey of Creative Europe AV stakeholders and programme beneficiaries (ICF Research)

origin and disregard partnerships between high PCCs and other countries, when such collaborations could be beneficial for the latter. In line with the Commission Work Programme for 2018, it is suggested to encourage this type of collaboration by awarding additional points at selection stage²²⁴.

Reviewing the eligibility criteria for video games

The European video gaming industry employs more than 100,000 people with an annual turnover of more than €100bn²²⁵. This represents 1.6 percent of all CCS employment in the EU²²⁶. In parallel, €2.5m are available for the co-financing of actions under the video games scheme, which represents 2-3 percent of the MEDIA Sub-programme's budget²²⁷. Creative Europe clearly recognises the growth potential of the European video gaming industry, and therefore the necessity to enhance its competitiveness. However, the limited financial support under this scheme requires the grants to be highly performant to achieve such aims. In this respect, the current eligibility criterion for video games (i.e. narrative, storytelling) may not be conducive to supporting more innovative genres with greater potential for growth and cross-border circulation²²⁸. It may therefore be that the budget for this scheme, albeit small, is not producing the best possible return on investment for the competitive objectives. A suggestion would be to have eligibility criteria based on strength and quality of the original game IP²²⁹ to better attract highly innovative applicants²³⁰.

3.1.3.2 Culture sector: three suggestions for improvement

The current Culture Sub-programme in its entirety is proving relevant in supporting the capacity-building needs of cultural organisations and in contributing towards cultural diversity in Europe. Nevertheless, three main improvement opportunities have been identified to further improve the relevance of the sub-programme's schemes.

Matching the growth ambitions of small cultural operators

Issues surrounding the level of financial support, in particular for smaller operators, were frequently raised by respondents to the Culture survey, while grant allocations have remained relatively stable across both the current and previous programming periods in relation to cooperation projects overall according to programme data. The other concerns raised by programme beneficiaries relate to the funding of alternative forms, where further support would enhance the promotion of emerging talents and innovative products. There is already a €12 million financial allocation threshold per call for small-scale cultural cooperation projects. However, beneficiaries have overall shown themselves to be in favour of raising it²³¹.

Improvements to the current Cooperation Projects scheme are needed to respond to the challenge of promoting cultural diversity while strengthening the financial viability and the competitiveness of European cultural operators. The scheme could better support capacity-building and resilience among small operators through introduction of an

²²⁴ Under such arrangements companies in low and medium PCCs would be incentivised to collaborate with companies in high PCCs. Unlike LPF provisions, this would have no adverse effect on smaller operators in high PCCs. It would, on the contrary, reinforce partnerships between small operators across all country types. See Focused Evaluation No.3 on TV Programming for further details

²²⁵ "How to Enable Digital Growth in Europe?" (European Games Development Federation, 2016)

²²⁶ According to Eurostat data for 2015

²²⁷ http://eacea.ec.europa.eu/creative-europe/actions/media/development-video-games_en

²²⁸ As reported by industry associations. These are also objectives stated in the Creative Europe 2016 Annual Work Programme for the European video games industry

²²⁹ Intellectual Property, also known as video game franchise

²³⁰ "How to Enable Digital Growth in Europe?" (European Games Development Federation, 2016)

²³¹ A recurrent point raised by cultural associations and CEDs in interviews. Also in FE4 on Cooperation Projects (pp 36, 43)

intermediate-sized grant (or intermediate step) to facilitate organisations' transition from smaller-scale to larger-scale projects (e.g. requirements relating to match-funding, number of partners, administrative requirements)²³². This point is particularly interesting as the Culture beneficiaries' survey shows that Creative Europe has attracted a higher share of responding organisations with 11-20 staff compared to Culture 2007-2013.

Elsewhere, there is a need for more flexibility both in the choice of topics within Cooperation projects and in changing the topic between the application stage and the start of projects. This would enable organisations to react more rapidly to current topics or to changing needs and circumstances²³³. On the other hand, there may be a risk that giving more flexibility in this regard could create additional administrative burdens as far as grant management is concerned.

Giving European Networks more flexibility to respond to change²³⁴

Greater flexibility in project funding requirements and management of such projects to meet the developmental needs of cultural subsectors would improve the relevance of the current European Networks scheme. While projects funded under the scheme (typically lasting 3 to 4 years) potentially generate positive effects, their initial design has not given beneficiaries the flexibility they would like to adapt their activities to wider sectoral or market evolutions even if new aspects and other similar adjustments can be accommodated in response to the work programmes they submit annually. The European networks scheme is, nevertheless, much more relevant than the discontinued generic operational grants under the previous programme: this Scheme offers cultural subsectors a framework to develop coherent capacity-building and growth strategies, whereas previously the operational grants came with no clear developmental guidelines²³⁵.

Literary Translation: promoting translations from smaller to bigger markets

There is a barrier to market access for publishers operating in more linguistically bound markets. , This may be the reason why a disproportionate number of Central and Eastern European publishers are applying for the Literary Translation scheme to translate books originally written in English or in the other major European languages such as French, German and Spanish. With this, translation of literature from smaller into bigger languages is not promoted.

The EUPL (European Union Prize for Literature) covers 38 countries and the prize winning books represent an exceptional linguistic and cultural diversity. Applications for the translation of EUPL-winning books are granted automatic points in a focussed effort to improve the visibility of literature from smaller and linguistically bound countries²³⁶. This move partially achieves the aim of cultural diversity and circulation of European literature from smaller languages. However the high number of applications for the translation of EUPL-winning books has meant that applications for novels and short stories (the genre covered by EUPL) are dominant. Also, fewer publishers from the UK, France, Germany and Spain tend to include EUPL winning books in their applications and hence, publishers from these countries are less likely to be selected for grants.

²³² See Focused Evaluation No.4 on Cooperation Projects (pp 13, 43) for further details

²³³ Ibid

²³⁴ See FE5 on Networks and Platforms (pp. 14, 35). Also in "Creative Europe programme analysis and recommendations" (Culture Action Europe, 2016).

²³⁵ Ibid, also confirmed in scoping interviews.

²³⁶ According to CEDs interviewed

3.1.3.3 Cross-sectoral strand: opportunities for improvement

Giving a true meaning to cross-sectoral innovation

A number of CEDs have highlighted difficulties in promoting the Cross-sectoral strand in a convincing way, as the schemes on offer are rather restrictive in terms of what has been funded and do not allow for the development of truly innovative (or experimental) projects cutting across the AV and culture sectors. For instance, the 2016 Refugee Integration call for projects appears to have mainly drawn interest from the cultural organisations and NGOs²³⁷. According to these CEDs, bringing together MEDIA and Culture under Creative Europe should have resulted in a wider scope for the activities to be supported under the Cross-sectoral Strand.

“Innovation” continues to bear different meanings under the MEDIA and Culture Sub-programmes, somewhat affecting the relevance of the Cross-sectoral Strand in terms of bringing the AV and culture sectors closer together around truly innovative projects²³⁸. Indeed, while the legal base clearly defines innovation in the context of the MEDIA Sub-programme as the development of new business models influenced by digital technologies²³⁹, “innovation” in the cultural sense is more loosely defined and akin to creativity or experimentation²⁴⁰. From the observations made by stakeholders taking part in the open public consultation, the separation between technically-driven and artistically-driven innovation appears no longer relevant in a context where digital technologies are revolutionising the CCS. As such, innovation should in a cross-sectoral context build bridges between technical excellence and artistic creativity.

3.2 Coherence

Coherence assesses how well the different Creative Europe programme actions complement each other (i.e. mutually supply what the other is lacking); produce complementarities and synergies; or, on the contrary, result in overlaps, inconsistencies, or gaps in relation to the general and specific objectives of the programme intervention (i.e. internal coherence).

Coherence also assesses how the objectives and the supported actions of the Creative Europe sub-programmes and predecessor programmes have been and continue to be complementary or overlapping with respect to other policy and funding initiatives implemented on the EU, national, and international levels (i.e. external coherence).

3.2.1 Internal coherence

This section focuses on the internal coherence of the actions supported under Creative Europe and the predecessor programmes, by considering:

- complementarities, synergies, and overlaps in the objectives of the different programme strands, as well as of the actions within these;
- the impact of the integration of the programme strands on the coherence of Creative Europe when compared to the predecessor programmes.

²³⁷ https://eacea.ec.europa.eu/creative-europe/selection-results/refugee-integration-projects-eacea-122016_en

²³⁸ Reported by one CED and also supported by a study from the European Cultural Foundation “Cultural and creative spillovers in Europe: a preliminary evidence review” (2015) with recommendations on how to promote a holistic vision for research and innovation in the CCS under Creative Europe

²³⁹ See Art. 10 (k) of Regulation (EC) No 1295/2013

²⁴⁰ See Recitals 17 and 20 of Regulation (EC) No 1295/2013

3.2.1.1 The coherence of the Creative Europe programme could be further improved by a stronger relationship between the MEDIA and Culture sub-programmes and improved integration of the Cross-Sectoral Strand

Creative Europe provides a set of actions to support the AV and cultural sectors and is internally coherent with both the MEDIA and the Culture sub-programmes. The MEDIA sub-programme delivers coherent coverage of the different stages of the value chain, and the Culture sub-programme provides a largely coherent response to the wide range of needs across the cultural sector. However, given the increasingly narrow boundaries between the AV and culture sectors, the Creative Europe programme could be improved through greater coherence between the sub-programmes themselves and between the sub-programmes and the Cross-Sectoral Strand.

The design of the MEDIA and Culture sub-programmes is internally coherent (e.g. in terms of objectives, priorities, actions funded) and no overlaps or duplications in the actions funded have been identified. The internal coherence of each sub-programme is discussed below in Sections 3.2.1.2 and 3.2.1.3. However, the sub-programmes mainly function independently of each other; and this despite the initial intent which led to Creative Europe: generating greater synergies in addressing the shared needs of the AV and cultural sectors. Strategy and planning of the MEDIA sub-programme lie with DG CNECT, while equivalent activities for the Culture sub-programme lie with DG EAC.

There is also potential for greater cooperation on the Cross-sectoral Strand, as responsibility for different schemes within this strand is currently divided between the two DGs. As a result, rather than truly operating cross-sectorally, there are components of the Cross-sectoral Strand managed by DG CNECT, and schemes managed by DG EAC. Greater collaboration between the DGs on individual schemes would facilitate stronger coherence of the Cross-Sectoral Strand with both sub-programmes.

The coherence of MEDIA, the Culture sub-programme, and the Cross-Sectoral Strand as *implemented in practice* (rather than in design) is rather unclear. Most stakeholders consulted noted that the coherence of EU support to the CCS improved under Creative Europe, although they were unsure whether this had produced any real benefit.²⁴¹ Stakeholders consulted noted that communication between the DGs and EACEA could be improved, and further inputs from EACEA in the strategy and planning process could help identify how to increase the integration of these strands in practice.²⁴²

3.2.1.2 The MEDIA sub-programme provides coherent coverage of the traditional AV value chain, although it requires a more coherent response to evolving technologies and business models

The MEDIA sub-programme covers the different stages of the traditional AV value chain in a coherent manner.²⁴³ However, rapid changes in technology and business models are increasingly challenging the relevance of the traditional value chain, and the MEDIA sub-programme should be able to adequately respond to these changes across all its

²⁴¹ This finding is based on the surveys and case study interviews. Most MEDIA and Culture Survey respondents reported that the integration of these sub-programmes and strand under Creative Europe has improved the coherence and impact of EU support to the CCS (61 percent and 50 percent, respectively). However, a significant proportion had no opinion or were not sure (33 percent and 39 percent, respectively), indicating uncertainty among a large proportion of respondents whether this change produced any real benefits. Interview responses were also divided, corroborating the survey findings. It is unclear whether the high degree of uncertainty was also due in part to a lack of understanding of coherence as a concept.

²⁴² Identified during scoping interviews.

²⁴³ MEDIA Survey respondents reported that funding priorities were comprehensive, allowing for internal synergies and avoiding possible gaps: 95 percent of respondents agreed that the MEDIA Sub-programme covered all the main AV areas in need of EU support, and 77 percent of respondents agreed that the different types of projects funded under the MEDIA sub-programme were complementary to each other.

schemes. The support for the different stages of the value chain is also effectively complemented by Training and Access to Markets.

The MEDIA sub-programme's support to different activities within the AV sector is comprehensive (i.e. providing complete coverage for the sector) and complementary, and the activities are also well-linked to each other through the traditional value chain.²⁴⁴ For instance, production companies and individual projects that were initially financed through the Single Projects development scheme have since received follow-up funding through TV Programming.²⁴⁵ There is also support to join up stages of the value chain in the form of Support to Sales Agents, which supports the development of links between the production and distribution sectors.

Additionally, there is internal coherence within each stage of the traditional value chain. For example, within the development stage, Single Projects and Slate funding are implemented in a way to guarantee overall coherence.²⁴⁶ Single Projects funding provides support for the development of individual projects, whereas Slate funding provides support for three to five projects, as well as the broader development of a company, its strategy, and its vision. Also, companies which benefit from Slate funding are not allowed to apply for Single Projects. Hence, Single Projects and Slate funding provide complementary and coherent mechanisms of support adapted to different scales of development and business needs.

Development schemes have different focuses and address the differing needs of smaller and larger companies. Single Projects funding creates an entry point and progression route for smaller AV companies within MEDIA, contributing to the cultural diversity of the European film landscape, whereas Slate funding is targeted at more mature companies that are already familiar with the programme.²⁴⁷

Similarly, the MEDIA sub-programme's distribution schemes are internally coherent. Sales Agents ensures the coherence of the distribution schemes with Creative Europe's support for production, by providing a link between producers and distributors. Cinema Automatic and Cinema Selective provide complementary mechanisms of support to distributors for different needs of film releases and different phases of cinema distribution: Cinema Automatic offers distributors with a proven track record of transnational distribution the opportunity to select films appropriate for their market, whereas Cinema Selective is focused on individual films with the ability to attract a number of distributors in a range of territories. Cinema Networks further complements these schemes through support for innovative modes of distribution among networks of European cinemas.

This support to traditional distribution channels is also complemented by Online Distribution's response to the changing technologies of distribution and trends in consumption. Online Distribution addresses the different challenges related to the online distribution of European films, as well as the need to support online distribution platforms themselves. The scheme covers a wider range of activities than the predecessor programme's Support to European VOD Services, showing increased coherence in the MEDIA sub-programme's approach to changing technologies and business models.

Cinema distributors are still at an early stage of adapting to online distribution with its requirements for new business models and specific approaches to marketing and audience development. Some distributors lack the knowledge and capacity to distribute their products online and are unable to respond to the fast-changing nature of online

²⁴⁴ As evidenced by interviews with stakeholders, beneficiaries and the analysis of programme data.

²⁴⁵ There have been at least 31 such instances, as evidenced by the programme data.

²⁴⁶ As evidenced by the schemes' guidelines and corroborated by interviews with applicants and the scheme management.

²⁴⁷ This view is shared by the interviewees at the EACEA and EC, as well as by beneficiaries' and counterfactual interviewees.

markets, particularly the increasing vertical integration of on-demand services. Further support for collaboration and consortia between traditional cinema distributors and specialist online distributors could offer added value, in terms of facilitating understanding and encouraging new business ventures.

The MEDIA sub-programme also provides support for AV sector players to develop the networks and partnerships needed to apply for project-specific funding opportunities through the Training and Access to Market schemes. These schemes therefore provide a coherent response to the requirement in other schemes for established partnerships, recognising that it would be difficult for AV sector players to develop these without any support.

As the sector adapts to new business models and responds to the rapidly changing value chain, the coherence of the schemes will need to be continually reviewed. For example, there has been an improvement in the coherence between the cinema distribution schemes and Online Distribution, as costs associated with preparation for online release are now also eligible under Cinema Automatic. The schemes will need to continue to recognise the changing value chain, such as by ensuring that the growing role of aggregators is recognised in ensuring films are packaged appropriately for new VOD platforms.²⁴⁸

3.2.1.3 The Culture sub-programme is broadly coherent in design, although the relationship between individual schemes could be further clarified in practice

Overall, the Culture sub-programme's schemes are coherent with each other, although more could be done to clarify the relationship between individual schemes among stakeholders and beneficiaries. While there is strong coherence between Cooperation Projects and respectively Networks and Platforms, the relationship between Networks and Platforms is less clear. Additionally, Literary Translation occupies a niche of its own within the Culture sub-programme.

Funding priorities were comprehensive and complementary across the schemes.²⁴⁹ However, the extent to which schemes are perceived as coherent varies: the relationships between Cooperation Projects and respectively Networks and Platforms are clearly visible, but the relationship between Networks and Platforms is less well understood by stakeholders or even beneficiaries.²⁵⁰

Cooperation Projects and Networks share key priorities such as increasing skills among cultural sector players, increasing organisations' capacity to cooperate internationally, strengthening organisations, and enlarging audiences for European works. Interviewees report that they mutually support each other on two different levels: Cooperation Projects create 'concrete' relationships between individual organisations, and Networks support broader dialogues among organisations and create mechanisms for monitoring developments in the sector.

Similarly, Cooperation Projects and Platforms are mutually coherent. The key priorities of Platforms are increasing the promotion and showcasing of talent from other countries,

²⁴⁸ Aggregators are already supported to an extent under Action 2 of the Online Distribution scheme.

²⁴⁹ 91 percent of respondents agreed that the different priorities under the Culture sub-programme were comprehensive, and 74 percent of respondents agreed that the types of projects funded under the Culture sub-programme were complementary with each other. A review of the scheme guidelines also shows that the individual aims and priorities of Culture sub-programme schemes complement and extend each other.

²⁵⁰ This was evidenced in the stakeholder and beneficiary interviews. Interviewees were asked open-ended questions about complementarity with other funding schemes, and no stakeholder or beneficiary mentioned the complementarity between Networks and Platforms. This lack of awareness is unsurprising, as the two schemes have different beneficiaries: Networks supports sector-facing organisations, whereas Platforms supports audience-facing organisations.

increasing the visibility and awareness of European values and cultures, increasing audiences and supporting emerging talent. These priorities complement and, to a certain extent, extend those of Cooperation Projects. Stakeholders consulted considered that Cooperation Projects have the potential for creating relationships between cultural organisations and that platforms have the potential for creating relationships with audiences,²⁵¹ which helps to integrate the way in which cultural works go to market.

The relationship between Networks and Platforms is less well understood, and interviews with stakeholders suggest that they have difficulties making a distinction between the two schemes, largely as the aims of Platforms are considered unclear.

Meanwhile, Literary Translation occupies a niche area within the Culture sub-programme. None of the stakeholders or beneficiaries from Cooperation Projects, Networks, and Platforms referred to this scheme, suggesting low awareness and a lack of integration with the rest of the Culture sub-programme. This is likely to be because Literary Translation has a much more targeted beneficiary group than the others.

3.2.1.4 The Cross-Sectoral Strand provides a coherent response to pan-sectoral needs, but could strengthen the overall coherence of Creative Europe through greater support for cross-sectoral work

The existing schemes in the Cross-Sectoral Strand provide a coherent response to the shared needs of the AV and cultural sectors: access to finance, transnational policy cooperation, and national-level support for the Creative Europe programme through its network of Creative Europe Desks. However, the schemes do not capitalise on cross-sectoral synergies and rarely support cross-sectoral work in practice. There is therefore an opportunity for the strand to not only address the pan-sectoral needs of AV and culture but also the overall coherence of the Creative Europe programme through increased support for cross-sectoral work.

The main relationship between the Cross-Sectoral Strand schemes consists of their common support to the shared needs of the AV and cultural sectors, primarily delivered through the allocation of funding to intermediary bodies that serve both sectors. The network of Creative Europe Desks ensures a coherent level of support for Creative Europe across the AV and cultural sectors and throughout the EU-28. However, not all activities funded through intermediaries are of equal benefit to both sectors (e.g. the contribution fee for EU membership of the European Audiovisual Observatory mainly benefits the AV sector). As a result, the Cross-Cultural Strand's response to the needs of the AV and cultural sectors is sometimes uneven. It is too early to assess the coherence of the activities as delivered, given that the Guarantee Facility was only launched in 2016.

Also, the Cross-Sectoral Strand insufficiently addresses the specific challenges and needs associated with cross-sectoral work, which is in part the result of the current division of responsibilities between DG CNECT and DG EAC. Rather than taking shared responsibility for the Cross-Sectoral Strand, each DG manages a set of sector-specific activities within the Strand, which inhibits the extent to which synergies between the AV and cultural sectors can be created.

Indeed, most projects delivered through the Cross-Sectoral Strand's direct funding to sector organisations either fell directly under the AV or the cultural sector, showing very little 'real' cross-sectoral work. The only exception is the special call for Refugee Integration Projects, which provided support to AV, cultural and cross-sectoral projects that aimed to facilitate the integration of refugees into European communities. This call

²⁵¹ As evidenced in stakeholder and beneficiary interviews.

could serve as a model for further collaboration between the DGs and future support for cross-sectoral work.

3.2.2 External coherence

This section focuses on external coherence of the actions supported under Creative Europe and the predecessor programmes by considering the complementarity (or lack of complementarity) of alternative funding sources to those of Creative Europe and the predecessor programmes at the national, EU, and international levels.

3.2.2.1 Creative Europe's transnational focus provides a distinctive offer that is complementary to the domestic focus of national policies and programmes

Creative Europe's objectives and priorities are overall coherent and complementary with those of national policies and programmes, thus respecting the principle of subsidiarity. The transnational nature of Creative Europe provides a distinctive offer that is rarely matched by national funding, which tends to focus more on domestic activities. This transnational focus is highly valued by stakeholders and beneficiaries as a unique element of Creative Europe.

Significant funding and multiple support mechanisms exist at the national, regional and local levels for the AV and cultural sectors. CCS organisations can benefit from sector and sub-sector specific funding, as well as cross-sectoral schemes and general support such for innovation and SMEs. They may also receive indirect funding such as tax credits and non-monetary support such as networks, platforms, events and advice.

The MEDIA and Culture sub-programmes are complementary to national funding opportunities/instruments for their sector. This complementarity is built in to the programme design through the subsidiarity principle.²⁵² For MEDIA, this can be seen in the sub-programme's complementary focus on different stages of the value chain, particularly for film: national funding tends to focus on production, while MEDIA complements this with upstream and downstream support to the other stages of the project life cycle.

Meanwhile, the Culture sub-programme has different types and degrees of alignment with national policies and programmes. In some cases, this alignment comes from shared priorities: for example, audience development is a priority for both Creative Europe and many national funds, offering opportunities for maximising impact. In other cases, the Culture sub-programme is complementary to national funding: for example, national funding for literary translation is typically only dedicated to the translation itself, and Literary Translation's support for wider promotion activities can help take forward a project initiated with national funding.

What distinguishes Creative Europe most from national funding schemes is its focus on international and transnational activities, which are rarely funded at national level. Interviewees confirm that Creative Europe fills an important gap, as not only does it provide support for the additional activities of European networking organisations, but it also enables national organisations to reach out across the borders.

²⁵² Survey responses indicate a high level of coherence between Creative Europe and national funding although there was significantly higher agreement among MEDIA beneficiaries (95 percent) than Culture beneficiaries (72 percent).

3.2.2.2 Creative Europe is largely coherent with other EU funding, although there could be greater awareness of other EU funding among the AV and cultural sectors

Creative Europe is largely coherent with other EU funding and support mechanisms relevant to the AV and cultural sectors, including both sector-specific opportunities and general financing, business and economic support for SMEs. The MEDIA sub-programme is complementary to other EU funding through its support for AV-specific projects and activities, which contrasts with other generic business and economic support. Meanwhile, culture is more integrated into other EU funding, and cultural projects and activities are eligible for other forms of EU funding without a specific 'cultural' focus. Additionally, there are no overlaps with other EU funding.

Several other EU funding and support mechanisms are available to the AV and cultural sectors such as through transnational instruments like Erasmus Plus, and the European Investment Fund (e.g. COSME, InnovFin).

Horizon 2020 has included actions which aim to use art to stimulate innovation, or to support the technological structures that help distribute or create AV content. For example, the Future Emerging Art and Technology (FEAT) project embeds artists in technology collaborations, aiming to develop new frameworks for collaboration and to drive both artistic and technological innovation.²⁵³ A second example is the action *Tools for smart digital content in the creative industries*, which aims to support innovation which leads to significantly improved technologies for digital content production and management.²⁵⁴ The SME instrument also has significant potential in supporting innovation, although there was low awareness with beneficiaries. Finally, there is a direct link between the Horizon 2020 programme and the STARTS Prize (funded under the Cross-Sectoral strand). These actions support the development of an effective technological infrastructure through which content can be shared; they therefore complement actions which have a greater focus on distribution and production of content.²⁵⁵ In particular, these complement the Online Distribution scheme, which may support for the marketing or the development of appropriate 'online ready' packages of films.

The European Regional Development Fund (ERDF) also makes a significant investment in national cultural infrastructure, such as heritage sites.²⁵⁶ This focus on 'hard' infrastructure at the national level complements the Culture sub-programme's funding for transnational activities such as programming, training, and capacity-building. Additionally, organisations can apply for funds that do not have a specific 'cultural' focus but finance activities that can be delivered through culture (e.g. education, training, exchanges).

Overall, although other EU funding can benefit the AV and culture sectors, they do not specifically focus on AV and culture (except for ERDF), and their main objectives are different than those of Creative Europe.

Although there is coherence between Creative Europe and other EU funding, more could be done to increase beneficiaries' awareness of the existence of other EU funding streams. Many beneficiaries did not know whether Creative Europe was coherent with other EU funding for their sector,²⁵⁷ as they lack a detailed understanding of specific

²⁵³ See http://cordis.europa.eu/project/rcn/199031_en.html

²⁵⁴ See <http://ec.europa.eu/research/participants/portal/desktop/en/opportunities/h2020/topics/ict-20-2017.html>

²⁵⁵ See European Commission (2017) INTERIM EVALUATION of HORIZON 2020 (Annex 2)

²⁵⁶ IRS (2015) *Ex post evaluation of Cohesion Policy programmes 2007-2013, focusing on the European Regional Development Fund (ERDF) and Cohesion Fund (CF) – Work Package nine: Culture and Tourism*

²⁵⁷ 27 percent of MEDIA survey respondents and 25 percent of Culture Survey respondents do not know whether Creative Europe is coherent with other EU funding for their sector.

opportunities, and only a few case study interviewees could name any other sources of EU funding or identify complementarities, gaps, or overlaps with other EU funding. Additionally, there are few examples of applications to other EU funding schemes or awards from these schemes among the case studies.

3.2.2.3 Creative Europe is largely coherent with Europe 2020's objectives of smart, sustainable, and inclusive growth

Europe 2020 sets out the EU's objective to attain smart, sustainable, and inclusive growth across Europe. Smart growth is defined as developing an economy based on knowledge and innovation; sustainable growth as promoting a more resource-efficient, greener, and more competitive economy; and inclusive growth as fostering a high-employment economic delivering social and territorial coherence. The annual work programmes and scheme guidelines show that Creative Europe is largely coherent with these objectives.

Creative Europe addresses the objective of smart growth through its focus on the target sectors of the CCS. These sectors are knowledge-based and often innovative, underpinned by a high level of creativity and grounded in extensive research and development activities. Several schemes have a specific focus on supporting innovation (such as Online Distribution or Platforms), and Creative Europe's annual work programme refers to the promotion of innovative spill-overs onto other sectors.

Creative Europe also addresses the objective of sustainable growth through its emphasis on increasing economic competitiveness, particularly within the MEDIA sub-programme, where there is a need for coordinated intervention to counter the significant market power of global conglomerates. The expectation for the efficient use of staff, time, and financial resources, and the requirement for match funding to increase the leverage of Creative Europe funding also contribute to the objective of sustainable growth.

Finally, the objective of inclusive growth is explicitly built into Creative Europe through its focus on social and territorial cohesion. Social cohesion is pursued by all schemes through their shared focus on increasing intercultural dialogue; additionally, it is a specific intended outcome of Cooperation Projects and Literary Translation. Territorial cohesion is addressed through provisions for ensuring the geographic balance of the portfolio, particularly the level playing field in the MEDIA sub-programme.

3.2.2.4 Creative Europe has clear links with the European Agenda for Culture's objectives of promoting cultural diversity and dialogue and promoting culture as a catalyst for creativity, but there is less emphasis on promoting culture in international relations

The European Agenda for Culture sets out three strategic objectives: promotion of cultural diversity and intercultural dialogue; promotion of culture as a catalyst for creativity in the framework of the Lisbon Strategy for growth, employment, innovation and competitiveness; and promotion of culture as a vital element in the EU's international relations. Creative Europe is coherent with each of these objectives, both in its overall programme design and in the specific focus of individual schemes within each sub-programme.

The promotion of cultural diversity and intercultural dialogue is a common thread throughout the programme, notably through its support for the transnational mobility of creative and cultural sector workers and works. Within the MEDIA sub-programme, positive discrimination (e.g. the Level Playing Field provisions of the Regulation) plays an important role in supporting cultural diversity; within the Culture sub-programme, Networks and Platforms are key forums for intercultural dialogue. Additionally, the Cross-

Sectoral Strand's call for Refugee Integration Projects supported these aims, as the integration of newcomers supports cultural diversity and enhances intercultural dialogue.

Coherence with the European Agenda for Culture's objective of promoting culture as a catalyst for creativity is evidenced through Creative Europe's support for capacity-building and skills development for CCS operators. The MEDIA sub-programme has a specific scheme devoted to training. Capacity building and skills development is also embedded across Culture sub-programme schemes, most notably Cooperation Projects and Networks.

There is less evidence of coherence with the European Agenda for Culture's objective of promoting culture as a vital element in the EU's international relations, as the support is focused mostly on facilitating and supporting transnational relationships within the EU. However, the eligibility criteria for some schemes allow participation from non-EU member states as member organisations.²⁵⁸

3.2.2.5 The Cross-Sectoral Strand's transnational policy cooperation activities are broadly coherent both with each other and with other EU policy activities for AV and culture

The transnational policy cooperation activities under the Cross-Sectoral Strand are designed to support the exchange of knowledge and practice relating to new business and management models. Additionally, it provides support for:

- Collecting market data; studies; analyses of labour, skills, market needs and policies; and statistical surveying;
- Paying the contribution fee for EU membership of the EAO;
- Testing new and cross-sector business approaches for funding, distributing and monetising creation;
- Organising conferences, seminars and policy dialogue, including in the field of media and cultural literary and the promotion of digital networking.

Specific activities funded from 2014 to 2016 included the development of benchmarks on cultural diversity in cultural institutions, policy development on support to innovation in the CCS, payment of the annual EAO membership fee and support to presidency conferences.

These activities are broadly coherent, both with each other and with other EU policy activities in the AV and cultural sectors. There is especially strong internal coherence between the support for data collection and analysis and payment of the EU membership fee to the EAO, which collects and distributes information about the AV industries in Europe, their markets and financing in the member states. These activities share a focus on increasing data and knowledge, both for the sector and for EU-level policy development. This contributes to the better availability of data in the AV sector than the culture sector.

EAO membership also complements the Digital Agenda for Europe and the Digital Single Market Strategy, as it supports the creation of a more unified understanding of the AV sector and the provision of comprehensive datasets, which in turn supports AV industries to take advantage of the trend toward digitisation.

There is also external coherence between support to Presidency conferences and other EU policies for AV and culture. This activity supports national cultural ministries of Member States holding the Council Presidency to develop their priorities in the field of culture, particularly their contributions to supporting European cultural and linguistic

²⁵⁸ Such as Networks, Platforms, and Cooperation Projects.

diversity and heritage, and to strengthening the competitiveness of the European CCS.²⁵⁹ Support to presidency conferences therefore shares Creative Europe's aims of increasing intercultural dialogue and increasing the competitiveness of the CCS.

In addition to these planned activities, there was in 2016 a special call for Refugee Integration Projects in response to the recent influx of refugees to EU member states. Refugee Integration Projects support AV, cultural and cross-sectoral projects that facilitate the integration of refugees into European communities by fostering respect and understanding for diversity, democratic values and citizenship, intercultural dialogue, tolerance and respect for other cultures. This scheme has synergies with other refugee programmes, e.g. under DG Migration and Home Affairs. However, its specific focus on achieving these aims through AV and culture creates a targeted opportunity to involve CCS organisations in supporting the needs of refugees.

3.2.2.6 There is coherence between the objectives of EU membership to the European Audiovisual Observatory (EAO) and the objectives of the EAO, as well as opportunities to make better use of available data

The aim of EU membership to the EAO is to enable provision of 'essential market and legal information to Europe's audiovisual industry', thereby contributing 'to improving the competitiveness of the EU's audiovisual industry, notably by improving the transfer of information within the industry and promoting a clearer view of the market'.²⁶⁰ Programme documentation and scoping interviews indicate that there is coherence between the objectives of EU membership to the EAO and the objectives of the EAO itself. Both are committed to improving the availability of data and access to data across the AV industries, although further use could be made of the available data within the Creative Europe programme.

The purpose of the EAO is to collect and distribute information about the AV industries in Europe, their markets, and financing in the member states. The EU (represented by the EC) is a member of the EAO and has committed to significant support through the PAGODA agreement (2016) to fund studies that can inform activities around copyright and AVMS reform. Through this work, it complements the EAO's aims to promote greater transparency and understanding about the functioning of the AV industries in Europe, in terms of both its economic and legal aspects. EU membership to the EAO is therefore particularly relevant to the priorities of the MEDIA sub-programme, as it establishes a level playing field in terms of access to information and provides data and analysis to inform policy-making in relation to its support for the AV sector.

EU membership to the EAO therefore brings many benefits to the MEDIA sub-programme that are lacking in the Culture sub-programme, which does not have a corresponding observatory for culture. However, better use could be made of the information generated by EAO to inform the EC's approach to the MEDIA sub-programme and its schemes. For example, there could be better alignment between the programme database and EAO datasets, and further and more systematic use could be made of the existing data and analysis to inform strategy, planning, and decision-making.

²⁵⁹ http://ec.europa.eu/dgs/education_culture/more_info/awp/docs/c-2014-5313_en.pdf

²⁶⁰ http://europa.eu/rapid/press-release_IP-99-170_en.htm

3.2.2.7 Creative Europe sits alongside a range of overlapping policies and programmes at the international level but avoids duplication because of the overall shortage of international funding

Creative Europe is broadly coherent with other international policies and programmes for the AV and cultural sectors. While they share similar aims and priorities, given the limited availability and scale of funding for transnational activities, there is no duplication in practice.

There is a small set of other international funding and support mechanisms available to the AV and cultural sectors, including the Council of Europe (e.g. Eurimages for film co-productions), cooperation with EFTA countries and through EU ACP, as well as other inter-regional initiatives (e.g. Filmkontakt Nord for the AV sector, Nordic Cultural Foundation for the cultural sector). Some Member States also have access to international development funds that can support the AV and cultural sectors, such as those of UNESCO or USAID.

Creative Europe complements other international funding opportunities/instruments for the AV and cultural sectors.²⁶¹ Notably, beneficiaries are unaware whether Creative Europe complements other international funding for their sector, but this may in part be due to a lack of awareness of the limited international funding opportunities which are available.²⁶²

Although international funding and support mechanisms share similar aims and priorities with Creative Europe, their coverage remains limited due to their relatively low number and small financial allocations compared to the demand among the AV and cultural sectors. Other international funding for culture comes mostly from trusts and foundations, whose funds are relatively small-scale and ad-hoc.²⁶³ The Culture sub-programme therefore complements other international support by providing a comparatively large-scale and consistent level of funding for transnational work.

3.3 Effectiveness

Effectiveness assesses the extent to which Creative Europe programme and its predecessor programmes (MEDIA, MEDIA Mundus and Culture) have contributed to the achievement of the EU policy objectives as well as their respective programmes' and schemes' level objectives. The Effectiveness section also provides an assessment of the extent these programmes have delivered their intended outputs (i.e. from programmed activities), results (outcomes of those activities) and have had the anticipated impact.

3.3.1 Predecessor and current programmes are effective in supporting the 'flowering' of EU cultures and cultural expressions

The predecessor and current programmes have been overall effective in pursuing the objectives listed in Article 167 TFEU²⁶⁴: preservation and promotion of cultural diversity and audiovisual heritage²⁶⁵, promoting transnational circulation of European artists and

²⁶¹ Most MEDIA and Culture Survey respondents reported that Creative Europe fully or partially complements other international funding for their sector (74 percent and 75 percent, respectively).

²⁶² 26 percent and 22 percent of MEDIA and Culture Survey respondents respectively

²⁶³ As evidenced by interviews with stakeholders and beneficiaries.

²⁶⁴ <http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:percent3A12008E167>

²⁶⁵ According to the programme data, the MEDIA predecessor and current programmes supported the development of around 1,800 European titles, of which 53 percent originated from medium and low PCCs. Culture programmes supported around 20,000 different European projects' titles. Furthermore, the MEDIA schemes (Automatic, Selective and Sales Agents) supported the theatrical distribution around 3,200 unique films/titles during the period 2007-2016. According to the results of the MEDIA survey, 80 percent of the respondents to the question 'How effective has the MEDIA Programme (2007-2013) been in relation to

other professionals²⁶⁶, access to their audiovisual works²⁶⁷ as well as in promoting artistic and literary creation²⁶⁸.

The support to cultural expressions and values enshrined in the 2005 UNESCO Convention²⁶⁹ is inherent to the predecessor programmes and Creative Europe 'by design'. Survey respondents underlined the importance of the programmes' support in terms of promoting artistic and social expressions as well as more general cultural and democratic values of European societies²⁷⁰. In addition, interviewees underlined the importance of the programmes in promoting understanding of different cultures and the cultural area shared by Europeans²⁷¹.

3.3.2 The predecessor programmes made a significant contribution against the EU strategic priorities, although more could have been done to 'put the citizen first' and tap into 'new' technologies²⁷²

The EU²⁷³ and the EC²⁷⁴ strategic priorities have evolved over the period covered by the evaluation (2007-2016). The achievements of the predecessor programmes must be

the following objectives? Preservation and promotion of cultural diversity and audiovisual heritage' indicated that the Programme was very effective and effective in this regard. Preserving European AV heritage is not a specific objective of the current MEDIA Sub-programme. Interviewees generally emphasized the overall programmes' contribution to cultural diversity or its contribution to promoting the cultural and linguistic diversity as well as access to European films (13 interviews).

²⁶⁶ Increasing the circulation of professionals was/is not an explicit objective of MEDIA programmes, however the programmes' training and market access schemes contribute to mobility of AV professionals. There is no monitoring data available on the number of professionals who have benefited from MEDIA support in access to markets (the newly proposed PMF includes indicators to measure this). Around 1,600 audiovisual professionals took part in the MEDIA training in the period 2008-2015, including 53 percent from low and medium PCCs (and 3 percent from non-Programme member countries). While it is currently not possible to aggregate the number of CC players (artists / professionals) who have been mobile beyond national borders due to Programme's support across the various Culture schemes (the newly proposed PMF includes indicators to measure this), the FE on Cooperation Projects suggest that supported projects led to transnational mobility of on average 270 cultural and creative players per project, while Network projects led to around 3,500 mobility experiences in 2014. The results of the Culture survey show that 84 percent of respondents to the question 'How effective has the Culture Programme (2007-2013) been in relation to the following objectives? Increased circulation of European artists and other professionals' indicated that the Programme was 'very effective' or 'effective'. The same applies to 77 percent of the respondents answering for the current Culture Sub-programme and 67 percent of respondents in relation to the current MEDIA Sub-programme. Promoting 'exchanges of professionals' was a stated objective under the predecessor MEDIA and MEDIA Mundus programmes.

²⁶⁷ Theatrical admissions generated by supported MEDIA projects have not been systematically monitored so far across the relevant MEDIA schemes (indicators for this purpose are included in the PMF developed in the context of this study). There are currently no data on audiences for TV productions supported. Admissions data for limited samples of supported and not-supported projects is presented in the MEDIA Development and Distribution FEs. 76 percent of the respondents to the MEDIA survey indicated that this Programme was 'very effective' or 'effective' in increasing access to European audiovisual works and heritage. 55 percent of the respondents to a similar question in the Culture survey have indicated that the predecessor Culture Programme (2007-2013) was 'very effective' or 'effective' in development of audiences for European CC works and heritage sites. The same applies to 62 percent of the respondents in relation to the current Culture Sub-programme.

²⁶⁸ There is no monitoring data on the extent supported projects have led to innovation (indicators for this assessment have been proposed in the new PMF). Around 4,000 have been produced with the support of the Culture programmes in the period 2007-2016, leading to an estimated 3.2 million books sold. 67 percent of the respondents to the question 'How effective has the MEDIA Programme (2007-2013) been in relation to the following objectives? Fostering creativity in the European audiovisual sector' indicated that the Programme was 'very effective' or 'effective'. The same applies to 62 percent of the respondents to this question in relation to the 'Enhanced innovation and creativity in the European CCS sectors' objective of the MEDIA Sub-programme. Similarly, 66 percent of the respondents in relation to the predecessor Culture programme and 67 percent in relation to the current Culture Sub-programme also said that these programmes were 'very effective' or 'effective' in addressing this objective. Enhancing creativity and innovation was not an explicit objective of the MEDIA Mundus Programme.

²⁶⁹ UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions (2005)
http://portal.unesco.org/en/ev.php-URL_ID=31038&URL_DO=DO_TOPIC&URL_SECTION=201.html

²⁷⁰ Six open ended answers to the MEDIA survey and 10 open ended answers to the Culture survey.

²⁷¹ Four interviews mention the contribution to better understanding of other European cultures and two more from smaller Member States the political importance of being part of the programme in terms of being part of the European cultural space.

²⁷² This sub-section covers the evaluation question 'To what extent can the Creative Europe programme and its predecessor programmes be said to have contributed to the achievement of the strategic objectives of the policy area?'

²⁷³ Europe 2020 strategy was proposed by the EC in 2010. It followed the previous Lisbon strategy devised in 2000.

²⁷⁴ I.e. the Barroso Commission that was in office from 2004 until 2014, and succeeded by the current Juncker Commission.

examined in the light of the Lisbon Strategy²⁷⁵ that aimed to make the EU 'the most competitive and dynamic knowledge-based economy in the world' and the priorities of the previous Commission²⁷⁶: growth and jobs, tapping into the potential of 'new' technologies, and 'putting the citizen first'.

The decisions establishing the predecessor programmes were linked to the Lisbon Agenda, thus ensuring the alignment of the programme objectives with the EU strategic priorities. The decisions establishing the predecessor MEDIA²⁷⁷ and MEDIA Mundus²⁷⁸ programmes emphasised the role of the EU support in boosting training, employment, economic reform and social cohesion in the audiovisual sector as well as the link between media and information society policies²⁷⁹. The Decision establishing the predecessor Culture Programme²⁸⁰ further recognised the increasing economic contribution of cultural industries and their role in combating social exclusion.

During the predecessor programmes' period, and in the context of decreasing national spend on CCS²⁸¹, the three predecessor programmes contributed €1.15bn in total to support the CCS²⁸². This included €769 million to support the audiovisual sector provided by the predecessor MEDIA Programme, €364 million in subsidies to cultural sectors under the predecessor Culture Programme and €13.8 million to support audiovisual cooperation with professionals from third countries under MEDIA Mundus. A total of around 7,300²⁸³ CCS entities benefited from the support of the predecessor programmes, around 2,800 companies in the audiovisual sector²⁸⁴ and 4,500 cultural sector operators²⁸⁵.

The combined financial support offered by the predecessor programmes led to the creation²⁸⁶ of an estimated 8,000 employment positions in European CCS, of these around 2,000 permanent and 6,000 temporary employment positions²⁸⁷. The predecessor programmes are estimated to have created 1.1 full-time employment places on average per programme beneficiary²⁸⁸, an overall noteworthy achievement considering that, for

²⁷⁵ Presidency conclusions, Lisbon European Council, 23-24 March 2000
http://www.consilium.europa.eu/en/uedocs/cms_data/docs/pressdata/en/ec/00100-r1.en0.htm

²⁷⁶ COM(2007) 640 final, Commission Legislative and Work Programme 2008 (including the priorities of the second term of the Barroso's Commission). http://ec.europa.eu/info/file/35889/download_en?token=yYTPUdmr

²⁷⁷ Decision No 1718/2006/EC concerning the implementation of MEDIA 2007

²⁷⁸ Decision No 1041/2009/EC establishing MEDIA Mundus

²⁷⁹ European i2010 initiative was the policy umbrella for the European information society and media policies

²⁸⁰ Decision No 1903/2006/EC establishing the Culture Programme (2007-2013)

²⁸¹ The spending was increasing but not as fast as employment in the sector, resulting in a net decrease in relation to the employment in the sector. In the period 2007-2013, the government spending on cultural, broadcasting and publishing services increased by 3 percent (from €77.7bn to €80.1bn), while the employment in the CCS rose by 15 percent (from 5.4 million persons to 6.2 million), and 10 percent in the audiovisual sector (from 740 to 812 thousand persons), according to Eurostat data.

²⁸² Programme data provided by the EACEA, ICF analysis.

²⁸³ Here and further – estimates based on programme data. Company names may change slightly over time or as entered in programme data, making it difficult to ascertain the exact number.

²⁸⁴ MEDIA 2007 and MEDIA Mundus combined (i.e. including around 60 AV sector operators that benefited from the MEDIA Mundus support in the period 2011-2013).

²⁸⁵ Each company or organisation was counted only once, removing the repeat beneficiaries.

²⁸⁶ The surveys questions explicitly focused on assessing the impact on employment created, not maintained.

²⁸⁷ Based on the extrapolated data obtained via the MEDIA and Culture surveys carried out in the framework of this study (2016). The surveys' data was used to calculate the average number of temporary and permanent employment positions created per type of respondent. Each respondent was asked to indicate the number of temporary and permanent employment positions created in their company or in their organisation due to Programme support (in FTEs). The estimated employment generated by the programmes' beneficiaries was then calculated using these coefficients and multiplying them with the total number MEDIA and Culture beneficiaries.

²⁸⁸ 1.6 on average among the beneficiaries of the predecessor MEDIA programmes and 0.8 among the beneficiaries of the predecessor Culture Programme

example, audiovisual production companies in 2013 employed 3.5 employees on average²⁸⁹, while book publishers on average 5.3 employees²⁹⁰.

Predecessor programmes had a few and very small components contributing to the strategic objective to 'put the citizen at the centre'²⁹¹ of the European project²⁹² and exploring potential of 'new' technologies as a driver of economic growth. The programmes' support was essentially oriented towards supporting the CCS and professionals²⁹³. While the predecessor MEDIA programme supported the development of European VOD platforms²⁹⁴ and digitalisation of cinemas²⁹⁵, the promotion of European audiovisual works online was only introduced with the current Programme²⁹⁶. The Literary translation scheme of the predecessor Culture Programme did not explicitly encourage the use of digital technologies in the distribution and promotion of the translated works, as Creative Europe does now.

3.3.3 Creative Europe delivers on the strategic EU priorities, but the Programme impact on creating employment is weaker for the Culture Sub-programme

The Creative Europe Programme is making an important contribution towards the EU2020 employment target²⁹⁷ and the priorities of the current Commission: stimulating investment for the purpose of job creation; and a deeper and fairer internal market with a strengthened industrial base²⁹⁸.

Similarly to the predecessor programme, during the first three years of the current Programme the employment in CCS grew faster than the governments' expenditure on culture²⁹⁹. The Creative Europe spend, however, almost 'matched' the growth of the

²⁸⁹ Eurostat, Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95) [sbs_na_1a_se_r2], Number of persons employed per enterprise, Motion picture, video and television programme activities

²⁹⁰ Eurostat, Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95) [sbs_na_1a_se_r2], Number of persons employed per enterprise, Book publishing

²⁹¹ E.g. organisation of 'European Rendez-Vous' at Cannes and actions targeting young audiences at festivals under predecessor MEDIA as well as cultural festivals and competitions for youth under predecessor Culture.

²⁹² COM (2007) 640 final

²⁹³ Audience development (i.e. film education) scheme was introduced in Creative Europe on the basis of a review of the lessons learned from the predecessor programmes (and hence was not supported during the previous programming period). Under Creative Europe this scheme received €1.9 million per year in the period 2014-2015 and €2.3 million in 2016, with further €1.4 million planned in 2017 (Programme data and 2017 Annual Work Programme).

²⁹⁴ The scheme allocated a total of €38 million during the seven-year period.

²⁹⁵ The scheme allocated a total of €9.6 million during the period 2012-2013.

²⁹⁶ One of the modules of the 'Online Distribution' scheme, supported by the Creative Europe Programme, has been used to support experimental pilot projects testing new approaches for distribution and promotion of European films. Starting with 2017, the budget of the scheme has been increased to €9.49 million, and aside continued support to European VOD platforms and film common heading packages, it will also support 'innovative strategies for distribution and promotion of European AV works, including audience development initiatives focusing on innovative and participatory strategies reaching out to wider audiences with European films' (2017 Annual Work Programme).

²⁹⁷ Europe 2020 targets http://ec.europa.eu/europe2020/targets/eu-targets/index_en.htm

²⁹⁸ https://ec.europa.eu/priorities/sites/beta-political/files/juncker-political-guidelines-speech_en_0.pdf

²⁹⁹ According to the Eurostat data, the general government expenditure on cultural, broadcasting and publishing services in the EU slightly increased (by 0.8 percent) in the period 2013-2014 from a total of €80.1bn to €80.7bn, while the employment in the CCS rose by 4 percent and by 3 percent in the audiovisual sector in 2015, compared to 2013.

sectors (20 percent increase in employment)³⁰⁰, with the current programme annual spend on average 18 percent higher than that of predecessor programmes³⁰¹.

During the period 2014-2016, the volume of support provided by Creative Europe to the CCS has amounted to €544 million, subdivided between €327 million and €179 million for the MEDIA and Culture Sub-programmes respectively, plus a further €38 million through the Cross-sectoral Strand (including the €14.8 million committed for the implementation of the CCS GF)³⁰².

Since the start of the Programme, around 2,580 CCS entities have benefited from the Creative Europe support, including 1,280 audiovisual companies and 1,300 cultural organisations. Around 150 entities and operators received support under the Cross-sectoral Strand. Noting that the CCS GF has only recently been implemented, CCS SMEs are still to benefit from the financial services supported by this instrument.

Regarding job creation, the Creative Europe Programmes *generated*³⁰³ an estimated³⁰⁴ 3,000 employment positions in the period 2014-2016 *directly in the organisations benefiting from the programmes*³⁰⁵. One fourth (or around 750) of these positions were estimated to be permanent employment positions while the rest were estimated to be temporary positions (around 2,250)³⁰⁶.

The support of the Creative Europe programme has led to the creation of an estimated 0.9 full-time employment places per programme beneficiary on average (1.6 FTEs among the beneficiaries of the MEDIA Sub-programme and 0.3 among the beneficiaries of the Culture Sub-programme). The Culture survey and the focused evaluations confirmed the lower propensity of the Culture Sub-programme to create employment positions as part of the Creative Europe Programme as well as the lower share of permanent positions created³⁰⁷. This lower propensity could be partially explained by grant amounts that have been on average 46 percent lower for Culture operators than they have been for

³⁰⁰ In 2015 (the second year of the current Programme and latest year for which Eurostat data is available) Cultural employment had increased by 20 percent, compared to 2008 levels (the second year of the predecessor programmes) with over one million more employees in the sectors. The average yearly support by the current Programme has increased by 18 percent compared to the yearly average of the predecessors, and 15 percent if the resources committed to the Cultural and Creative Sector Guarantee Facility are not factored in the calculation.

³⁰¹ Employment growth in culture sectors was not offset by similar increase in public spending. According to Eurostat data Cultural employment increased by 20 percent in 2015, compared to 2008. Government spending on cultural services only increased by 6 percent in the period 2007-2014.

³⁰² Programme data provided by the EACEA, ICF analysis.

³⁰³ Source: Survey data and ICF Extrapolations. The way that the question was phrased assessed the impact of the programmes on the generation of employment in the organisations represented by the respondents. This question did not focus on assessing the extent the programmes may have sustained the already existing employment.

³⁰⁴ Data on temporary and permanent employment generated by the MEDIA and Culture surveys, extrapolated based on the number of beneficiaries in respective periods. Sole beneficiaries and lead applicants under the Culture programmes have been placed together for this calculation. Calculation accounts for the different rates the lead applicant and partner organisations generated temporary and permanent employment based on the Culture survey data. For MEDIA all categories of respondents (lead applicant, partner, and coordinator) were treated as one category – as the number of respondents that placed their organisation in the categories 'partner' and 'coordinator' was relatively low.

³⁰⁵ The programmes' impact on employment is likely to be wider, extending also to the sectors and operators that the programmes' beneficiaries work with. These aspects were examined with a sample of supported projects and non-supported applicants during FEs. Only a few of the interviewees were able to assess the impact of the Programme support on the employment of freelancers by their company/organisation and their sector at large. The results of the interviews on these topics were therefore inconclusive. Indicators are proposed in the PMF for further systematic monitoring in these impacts through projects' reporting.

³⁰⁶ The share of the permanent and temporary positions has remained largely the same as for the predecessor programmes. There is 1 p.p. difference in favour of permanent employment created by Creative Europe, compared to the predecessors (24 percent vs. 76 percent for the predecessor programmes and 25 percent vs. 75 percent for Creative Europe).

³⁰⁷ 18 percent of employment positions created by the beneficiaries of the Culture Sub-programme were permanent posts, as opposed to 27 percent for MEDIA. It is unclear whether this may depend on the nature of activities supported by the Culture Sub-programme, the type of operators supported by this programme or their employment practices.

companies supported by MEDIA under the current Programme³⁰⁸. Furthermore, this lower capacity could be due in large part to the four times lower³⁰⁹ Programme support to operators in culture than audiovisual sub-sectors³¹⁰.

As for the priority of the current Commission on 'strengthening the industrial base', the programmes have strengthened organisations that benefited from funding support, especially in the MEDIA programmes³¹¹. The majority of respondents reported 'major' or 'moderate' impact of the programmes' funding on increased turnover or market position of their organisations³¹².

3.3.4 Predecessor programmes have been delivering on most of their general and specific objectives, however...³¹³

The predecessor programmes were effective in delivering on most of their general and specific objectives³¹⁴. However, each of the predecessor programmes was much less effective in relation to a couple of their objectives that broadly correspond to the areas of 'weaknesses' highlighted in Section 3.3.2: i.e. insufficient attention to the 'citizen' and 'adaptation to market'. The current Culture Sub-programme has a weaker effect on strengthening 'market positions' of the supported operators (discussed in Section 3.3.3) a trait that continues from the predecessor Culture Programme³¹⁵.

3.3.4.1 The predecessor MEDIA programme strongly contributed to its key development and circulation objectives, but could have been more effective in following market developments

The predecessor MEDIA Programme was mostly effective in supporting the development of European AV works³¹⁶. The Development schemes of the predecessor Programme supported on average the development of 450 films per year. Around 209 of these films were produced and 121 made it to the market (or around 7% of *all* movies produced in the countries eligible for MEDIA funding³¹⁷).

³⁰⁸ The average amounts were calculated using the Programme data on the total spending by the MEDIA and Culture sub-programmes in the period 2014-2016, divided by the number of unique companies and operators supported by the sub-programmes in the period.

³⁰⁹ The Culture Sub-programme spending during the first three years of Creative Europe was €179 million, roughly half the MEDIA Sub-programme spending (€327 million). However, employment, according to Eurostat, was twice higher in culture sub-sectors than in the audiovisual (please see section 3.3.9 for further detail).

³¹⁰ This does not mean that Culture operators have a lower potential of employment creation in the sectors targeted by the Culture Sub-programme; quite the opposite. According to the Eurostat data combined employment in the culture sectors 'Creative, arts and entertainment activities' and 'Libraries, archives, museums and other cultural activities' was 6 percent in the period 2013-2015, twice that of audiovisual sectors 'Motion picture, video and television programme production, sound recording and music publishing activities' and 'Programming and broadcasting activities'. It must be noted that the Eurostat sector categorisation does not fully match that used by the EACEA and this study (please see section 1.1).

³¹¹ Source: Survey Respondents

³¹² A total of 67 percent respondents to the MEDIA survey and 53 percent of the respondents to the Culture survey agreed with the statement. The current MEDIA Sub-programme has had slightly stronger impact on the improving the market position of participating companies than the predecessor MEDIA programmes (32 percent vs. 29 percent of respondents reporting 'major impact' in this area). The opposite can be said about the Culture programmes, and the impact is overall a bit less significant (21 percent of respondents reported 'major impact' on growth of their organisation in terms of turnover due to predecessor Culture Programme's funding, compared to 18 percent in relation to the current Culture Sub-programme).

³¹³ This section responds to the evaluation question 'To what extent have Creative Europe and its predecessor programmes achieved their general and specific objectives?', focusing the on the predecessor Programmes

³¹⁴ The objectives of predecessor programmes are shortly presented in section 1.4.

³¹⁵ According to the Culture survey only 19% of respondents across predecessor and current Culture programmes reported 'major impact' of the programmes' funding on the turnover or market position of their organisation. In comparison, 31% of all MEDIA respondents reported 'major impact' of the programmes' support in these areas.

³¹⁶ This was also corroborated by the interview with the European Coordination of Independent Producers (CEPI) that represents approximately 8000 independent production companies in Europe.

³¹⁷ According to the EAO data, the total Member States' support to film industry amounted to €2.1 billion in 2009. The same year the predecessor MEDIA spending was €109 million (or 5% of the amount spent by the Member States). In the middle of the predecessor period, in 2010, 1,633 films were produced in the European countries eligible for MEDIA support (EAO data).

The predecessor MEDIA Programme was effective in increasing access to European AV works³¹⁸, their circulation³¹⁹, enhancing intercultural dialogue, fostering creativity in the sector and improving the skills of audiovisual professionals³²⁰. The programme was also moderately effective in disseminating Europe's cinematographic heritage and strengthening the structure of the European audiovisual sector³²¹.

The predecessor MEDIA Programme could have better followed market developments, including the digital shift, and better addressed market imbalances. It was the least effective meeting three objectives (1) increasing the presence of European AV works on online platforms, (2) ensuring that the Programme evolved to account for market developments³²² and (3) reducing the imbalances in the European AV market (i.e. the 'levelled playing field' objective³²³).

3.3.4.2 The predecessor Culture programme was effective in increasing the transnational mobility and capacity, but less so in strengthening the operators financially and promoting their work with underrepresented groups

The predecessor Culture Programme was particularly effective in relation to three objectives: increasing the transnational circulation of artists and other professionals³²⁴, the transnational circulation of European cultural and creative works³²⁵, and building the capacity of the CCS for transnational work³²⁶. In addition, the mobility of artists and professionals played a role in providing learning experiences, extending international collaboration and creating a 'European cultural space'³²⁷.

The predecessor Programme was moderately successful in preserving and promoting cultural and linguistic diversity, enhancing innovation and creativity in European CCS, promoting intercultural dialogue and understanding, audience development³²⁸ and

³¹⁸ Around 70% of distributors supported by the predecessor MEDIA Programme reported 'major' or 'moderate' impact of the Programme support on increasing their total audiences or admissions. The distributors supported under the Distribution Automatic scheme reported around 21,200 official admissions during the predecessor period. This was 7,500 (or 55%) more than the admissions reported during the seven year period before the predecessor Programme.

³¹⁹ The predecessor MEDIA distribution schemes supported the distribution of around 2,200 unique titles during the period 2007-2013. The Distribution Selective scheme alone supported the circulation of around 370 titles, each on average in 10 non-national markets / countries.

³²⁰ Please see section 3.3.8.1 for further discussion on the outputs, results and impact of the MEDIA 2007

³²¹ MEDIA survey, scoping and key stakeholder interviews

³²² The Interim evaluation of MEDIA 2007 found that 'the Pilot Projects line has not been particularly successful. There have been very few applications and the projects have not yet been shown to be viable, although it would take no more than one or two really innovative projects to validate the relevance of this exploratory line' (pg. 41).

³²³ Only 11-17% of the around 200 MEDIA survey respondents who provided answers to the question 'How effective has the MEDIA Programme (2007-2013) been in relation to the following objectives?' judged the predecessor Programme 'very effective' in relation to these priorities. This was also confirmed through scoping, national and EU level key stakeholder interviews

³²⁴ 53% of the respondents to the Culture survey in relation to the predecessor programme judged it 'very effective' in relation to this objective and further 32% 'effective' (n=318). Please also see the results of the focused evaluations on the Cooperation and Networks schemes, where the survey results have been triangulated with the counterfactual interviews that emphasise the importance of transnational mobility of cultural and creative players and works as central to these schemes.

³²⁵ The predecessor Culture Programme contributed to 2,532 translations and an estimated number of 2.1 million books sold. Sources: Culture focused evaluations. For predecessor Cooperation projects the reports did not include data on the planned activities, making it difficult to assess the effectiveness of implementation. However, 85% of the 259 respondents to the Culture survey, representing projects supported by the predecessor Programme, reported that their project was either 'very effective' (51%) or 'effective' (34%) in 'transnational circulation of cultural and creative works'.

³²⁶ A total of 91% of respondents to the Culture survey who represented projects that benefited from the predecessor Culture Programme support indicated that their project was 'very effective' (43%) or 'effective' (48%) in 'development of capacity of cultural players to operate internationally'.

³²⁷ Focused evaluations on the Cooperation and Networks schemes (European Platforms where not supported under the predecessor Culture Programme).

³²⁸ Culture survey findings corroborated with key stakeholder interviews, including most EU level sector representing organisations e.g. The European Council of Music, The European Choral Association – Europa Cantat, IETM – a network of over 500 performing arts organisations, The Federation of European Publishers and others)

enhancing competitiveness of supported operators³²⁹. Interviewees underlined the importance of public funding in supporting innovation and audience development, while also noting that more could have been done in the field to meet these objectives. In particular several EU level sector representing organisations, noted that more funding would have been needed for the predecessor programme to better contribute to the general objective on competitiveness.

The predecessor Culture Programme was the least effective in relation to the specific objectives of strengthening the financial capacity of companies and operators in CCS³³⁰, and increasing the access to cultural and creative works to underrepresented groups³³¹. However, a number of EU level sector organisations³³² noted that the predecessor Culture Programme had a positive effect on leveraging support from other funding sources³³³. Only a few national and EU level Culture sectors' representing organisations commented on the Programme contribution to improving access to culture, emphasising the European diversity³³⁴ and social inclusion could have been more explicitly embedded in the Programme design³³⁵.

3.3.4.3 The MEDIA Mundus was effective in improving European and third countries professionals' knowledge of audiovisual markets, but less so in facilitating access to films from third countries

MEDIA Mundus Programme was mostly successful in improving European and third countries professionals' knowledge and understanding of audiovisual markets³³⁶. Similarly, interviewees also underlined the role of MEDIA Mundus training activities in achieving this objective.

According to all stakeholders consulted, the Programme was moderately successful in improving the third countries audiences' access to European audiovisual works and increasing promotion and sales of European audiovisual works outside Europe objectives of MEDIA Mundus.

The Programme was the least effective in facilitating the access to third countries' audiovisual works to European audiences and young people in particular. For instance, the lack of interesting and quality projects was underlined as a concern by the interviewees. The latter also suggested that European countries have always been open to other countries' productions.

3.3.5 Creative Europe effectively balances the general objectives of diversity and competitiveness³³⁷

The Creative Europe Programme has been overall effective in achieving its general objectives of preserving and promoting cultural and linguistic diversity, and strengthening the competitiveness of the European CCS. According to more than 700

³²⁹ Only roughly a half (53%) of Culture survey respondents reported positive impact of the predecessor Culture Programme support on the turnover or market position of your organisation.

³³⁰ e.g. European Council of Music, IETM, Europa Cantat, Network of European Museum Organisations.

³³¹ One of the challenges mentioned by a representative of Europa Cantat is the inherently local nature of the work with these groups that can only be supported by sharing of good practice examples on the European level.

³³² e.g. IETM, Europa Cantat, Network of European Museum Organisations

³³³ The representatives of the organisations suggest that having a successful bid under the Programme increases the chances of the project to receive support from other fund, has helped in the past to obtain national match funding and has acted as a European quality label in seeking co-funding.

³³⁴ Also including minority cultures when referring to 'European cultures'

³³⁵ A couple of national key informants and two EU level sectors' representing organisations.

³³⁶ MEDIA survey results, two scoping interviews with programme managers and additional interview with a key EU level beneficiary of MEDIA Mundus.

³³⁷ This section responds to the evaluation question 'To what extent have Creative Europe and its predecessor programmes achieved their general and specific objectives?', focusing the on the current Programme

Programme beneficiaries³³⁸ Creative Europe equally contributed to its two general objectives: around 70% of respondents indicated that the programme has been 'very effective' or 'effective' in achieving each of these two general objectives. This balance in the extent Programme is addressing its general objectives is also reflected in the OPC results³³⁹.

The extent the current Programme balances its 'diversity' and 'competitiveness' general objectives is further summarised in Table 9.

Table 9. Balance between 'diversity' and 'competitiveness' general objectives of the Creative Europe Programme

Diversity	Competitiveness
Share of companies from low and medium PCCs increased compared to the predecessor MEDIA Programme from 48% to 60%.	On average 11% increase in spending per operator, compare to predecessors ³⁴⁰
The share of micro, small and medium-sized enterprises ³⁴¹ supported by MEDIA is 99%;	The share of large companies supported by MEDIA Sub-programme is 1%;
The share of micro and small operators supported by Culture Sub-programme is 91%	The share of large operators supported by Culture Sub-programme is 9%
94% of survey respondents reported that MEDIA promotion projects ³⁴² had a positive impact on the access to a wider diversity of European audiovisual works	Share of Programme's beneficiaries reporting positive impact of Programme support on the turnover or market position or their company or organisation:
73% of survey respondents considered that the share of Culture Literary translation projects had a positive impact on increasing the national / linguistic diversity of the literary works translated	MEDIA: 32% major impact and 36% moderate impact; Culture: 18% major impact and 35% moderate impact
The share of MEDIA funding to medium and low PCC is 43% (32% and 11% respectively) ³⁴³	The share of MEDIA funding to high PCC is 46%, it decreased by 8% compared to predecessor ³⁴⁴
The share of films distributed from medium and low PCCs is 36% (26% and 10% resp.) ³⁴⁵	The share of films distributed from high PCCs is 64% (a similar figure was reported under predecessor the predecessor programme 63%)
The average number of theatrical distributors for medium and low PCC films is 13.5 per	The average number of distributors for theatrical distribution of high PCC films is

³³⁸ 751 respondents across the MEDIA (n=396) and Culture (n=355) surveys provided their answers to the same question 'How effective has the Creative Europe, its MEDIA and Culture Sub-programmes been in relation to the following objective: Preservation and promotion of cultural and linguistic diversity?'; 762 respondents, across the MEDIA (n=398) and Culture (n=364) surveys provided their responses on a similar question in relation to the 'competitiveness' general objective.

³³⁹ 80% of the OPC respondents (n=510) indicated that the Programme has achieved the 'Preserving and promoting cultural and linguistic diversity' general objective 'to a moderate', 'to a large' or 'to a very large' extent, the same is true for 78% of respondents (n=506) in relation to the 'Enhancing the competitiveness of the European cultural and creative sectors' general objective.

³⁴⁰ Programme data. Total spending for MEDIA and Culture programmes only (not including MEDIA Mundus and the current Cross-sectoral strand), calculated using figures on 'unique' beneficiaries (i.e. repeat beneficiaries counted as one). It also can be noted that the amounts spent per 'unique' beneficiary have slightly decreased for MEDIA (by 6% on average) and considerably increased for Culture beneficiaries (by 72% on average).

³⁴¹ Using the EU definition of SMEs reflected in the design of the MEDIA and Culture surveys.

³⁴² MEDIA survey data, respondents who benefited from the support of the Access to Markets, Festivals and Stands under the current Programme (n=70)

³⁴³ This increase represents around €5 million more invested in medium and additional €850 thousand in low PCC each year (or 17% and 8% increase respectively of annual investment compared to predecessor MEDIA).

³⁴⁴ This decrease represents €8 million on average per year, compared to the predecessor MEDIA

³⁴⁵ Programme data, category covers MEDIA Distribution Automatic, Selective and Sales Agents schemes

Diversity	Competitiveness
films ³⁴⁶	13.7 ³⁴⁷ per films
The share of Culture grants below €100,000 reached 35% of all grants awarded ³⁴⁸ (compared to 53% under the predecessor Culture Programme)	The share of grants above €100,000 reached 65% of all grants awarded (compared to 47% under the predecessor Culture Programme)
The share of Culture projects led by operators from medium and smaller countries ³⁴⁹ is 42% (compared to 46% under the predecessor Programme)	The share of Culture projects led by operators from nine EU countries with the largest populations is 58% (compared to 54% under the predecessor Programme)
Diversity and competitiveness ³⁵⁰	
Countries' coverage increased by six countries for MEDIA and by two countries less for Culture programmes ³⁵¹	
There is evidence of a moderate structuring effect of the Programme support on the CCS: 54% of MEDIA beneficiaries ³⁵² supported the above statement 11 EU level organisations (six for culture and five audiovisual) representing CCS supported the above statement ³⁵³	
Non-national admissions and distribution territories for supported films ³⁵⁴ : MEDIA Distribution schemes Cinema Automatic and Selective have achieved more than 205	

³⁴⁶ Programme data, category covers only the MEDIA Distribution Selective scheme. The supported distributors that report admissions for generation of potential fund under Distribution Automatic reported distributing medium and low PCC titles in 3 and 4.7 countries respectively.

³⁴⁷ Programme data, category covers only the MEDIA Distribution Selective scheme. The supported distributors that report admissions for generation of potential fund under Distribution Automatic reported distributing high PCC titles in 5 countries in average.

³⁴⁸ The total number of grants provided by Culture Sub-programme during the first three years of Creative Europe is 516, of which 179 grants were below the amount of €100,000. The predecessor Culture Programme provided a total of 2,227 grants, of these 1,185 were grants below €100,000.

³⁴⁹ All, except the bigger nine in terms of the size of the population: Germany, France, the UK, Italy, Spain, Poland, Romania, the Netherlands and Belgium. Together the medium and smaller countries account for 32% of all employment in culture sectors according to Eurostat. The nine bigger countries – 68%, with 23% of the EU's cultural employment in Germany, 22% in the UK and 11% in Poland. It needs to be noted that the distribution of Programme funds cannot be fully proportionate to cultural employment, if promoting cultural and linguistic diversity remains one of the two general objectives of the Programme.

³⁵⁰ As reflected in the newly developed PMF, there are a number of indicators that relate to both general objectives of the Programme. One of these is the number of admissions for AV works supported by MEDIA and audiences for Culture projects. Increases in admissions/reach of supported projects should lead to both more diverse offer of CC works and improved competitiveness of the companies or operators that developed them. Similarly, the quality of the CC works supported should contribute to both diversity as well as the volume of their consumption.

³⁵¹ Programme data. The predecessor MEDIA Programme supported companies from 32 countries, compared to 38 under the current MEDIA Sub-programme. The predecessor Culture programme extended support to 39 countries (excluding cooperation with third countries), compared to 37 under the current Culture Sub-programme.

³⁵² MEDIA survey, share of beneficiaries who indicated that the Programme support had been effective or very effective in consolidation and integration of the European audiovisual sectors (n=397). This indicator was not measured by the Culture survey as it is not a part of the Programme design. For the same reason no Programme monitoring data exists in this area. The PMF developed for the Programme in the context of this study proposes to measure this effect for all Programme schemes, both in terms of structuring the sector and demonstration effect.

³⁵³ The culture sector EU level organisations that commented on this question have more than 700 members and 5000 organisations in at least 50 countries. They report that the Programme has brought attention to CCS, had a structuring effect on beneficiaries, numerous examples of kindred cooperation and follow up projects. The EU level organisations representing more than 270 audiovisual sector member in over 30 countries report 'positive impact' of MEDIA Distribution schemes, several cases of programme encouraging beneficiary engagement in large European projects that lead to greater exposition of European works, their consumption and profitability, increasing number of co-production projects and several instances (FR, DE, IE) where the Programme had a positive impact on structuring national audiovisual sectors.

³⁵⁴ The analysis of the non-national admissions, non-national markets and ratings of the films developed with the support of the MEDIA Development schemes (Single Projects and Slate Funding) is not possible at this time as most films have not yet made it to the market

Diversity	Competitiveness
million admissions during the first three years of the programme ³⁵⁵	
A total 113.8 million non-national admissions were reported under Cinema Automatic in the period 2014 to 2015; films were distributed with the support of this MEDIA scheme in 17.9 territories on average ³⁵⁶	
Cinema Selective support generated an estimated total of 34.4 million non-national admissions in the period 2014-2016 ³⁵⁷ ; films were distributed with the support of this MEDIA scheme across 22.8 territories on average ³⁵⁸	
Quality of productions developed and distributed:	
The average IMDb rating is 6.7 for Cinema Automatic and 6.8 for Cinema Selective on IMDb ³⁵⁹ ;	
The average nomination and awards per film is 6.6 and 9.9 respectively for Cinema Automatic, 8.6 and 9.1 respectively for Cinema Selective;	
The average IMDb rating for TV Programming is 7.2 out of 10, and half of the supported projects received at least one nomination, one third received the awards ³⁶⁰	
Around 3,800 MEDIA professionals were trained, including 54% from low (25%) and medium (29%) PCCs and 9% from non-member countries ³⁶¹	
The total number of audiences reached by Culture projects ³⁶² is 3,236,545 from 2014 to 2016	
The total number of audiences who are young people is 1,644,745 ³⁶³ .from 2014 to 2016	
The number of cultural and creative players mobile or mobility experiences reached 297,900	
The number of translations supported is 1,394 and this contributed to around 1.4 million books sold, including increased focus on less represented genres ³⁶⁴	

Source: ICF analysis

The next four sub-sections provide the key findings in relation to various sub-programme areas that further demonstrate the improved Programme performance or cumulative programmes' effects contributing to the general 'diversity' and 'competitiveness' objectives: improved level playing field provisions under the MEDIA Sub-programme, MEDIA programmes' contribution to the scalability of companies and Culture Sub-programme's contribution to artistic and economic development of CCS as well as the creation of a 'European cultural space'.

³⁵⁵ Extrapolated data based on Automatic admissions reported in the period 2014-2015 and admissions for a sample of films distributed with the support of Cinema Selective scheme.

³⁵⁶ Based on the EAO Lumiere Database from a sample of films per year in 2014 and 2015 only, as 2016 data not yet available.

³⁵⁷ Based on an average of 24,742 non-national admissions from a sample of projects per year from 2014 and 2015, multiplied by 1,392 projects from 2014 to 2016

³⁵⁸ Based on the EAO Lumiere Database from a sample of films per year in 2014 and 2015 only, as 2016 data not yet available.

³⁵⁹ Compared to an average score of 6.4 for all films on the website. Based on a sample of 50 films per year from 2014 and 2015.

³⁶⁰ Focused Evaluation on TV schemes, pg. 26. The sample of the 50 supported projects mapped covered the last two years of the MEDIA predecessor Programme and the first year of Creative Europe

³⁶¹ Programme data on participation in MEDIA training was only available for the first two years of the programme

³⁶² Only for the key Culture schemes – Cooperation Projects, Networks and Platforms, period 2014-2016.

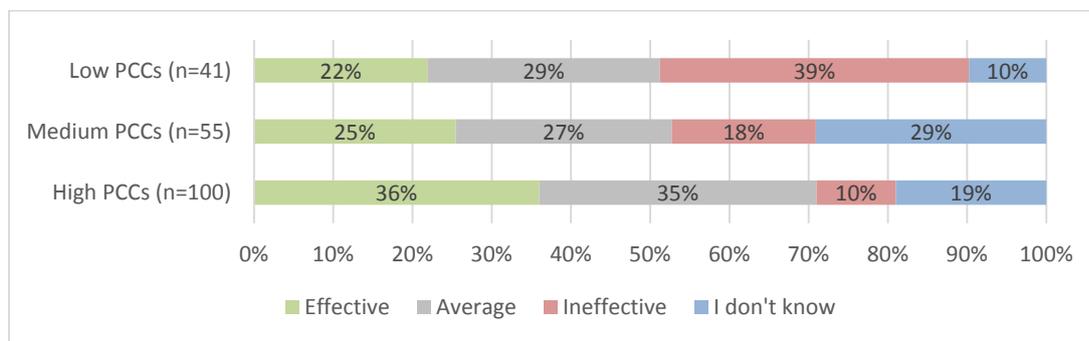
³⁶³ Only for the key Culture schemes – Cooperation Projects, Networks and Platforms, period 2014-2016.

³⁶⁴ From 18% to 21% of supported translations, including also 7% of children's fiction – a genre that was not explicitly pursued under the predecessor Programme.

3.3.5.1 The level playing field provisions of the Creative Europe MEDIA Sub-programme are more effective in balancing the diversity and competitiveness considerations than its predecessor Programme, however not in relation to low PCCs³⁶⁵

As highlighted above (please see 3.3.4.1) the achievements of the predecessor MEDIA Programme were the weakest in the area of reducing imbalances in the European audiovisual market i.e. the 'levelled playing field' objective³⁶⁶. However, the current MEDIA Sub-programme, compared to its predecessor, is perceived to be far more effective in reducing these imbalances by programme beneficiaries from high, medium and low PCCs alike³⁶⁷ (please see Figure 5 and Figure 6 below). However, as illustrated in Section 3.3.6 the 'level playing field' objective still remains the specific objective that the MEDIA Sub-programme of Creative Europe is the least effective in addressing³⁶⁸.

Figure 5. How effective has the MEDIA Programme (2007-2013) been in relation to the following objective: Reduced imbalances in the European audiovisual market (i.e. levelled playing field)³⁶⁹



Source: MEDIA survey (2016)

³⁶⁵ This section covers the 'level playing field' related evaluation questions 'To what extent has the strong commitment to cultural diversity and to a level playing field between big production countries and small countries meant that some schemes focus on small beneficiaries, which do not have the size to compete in the European and global market?' and 'How has the implementation of the automatic points system contributed to the achievement of the programme's objectives?'

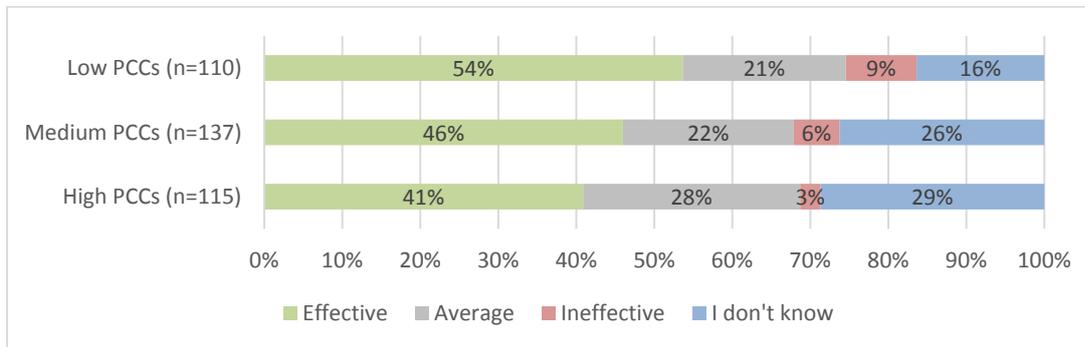
³⁶⁶ Article 1 of the Decision establishing MEDIA 2007 lists 'reducing the imbalances in the European audiovisual market between high audiovisual production capacity countries and countries or regions with low audiovisual production capacity and/or a restricted geographic and linguistic area' among the priorities of the predecessor Programme. The formulation in the current Regulation establishing Creative Europe (Article 4) is 'ensuring a more level playing field in the European cultural and creative sectors by taking account of low production capacity countries and/or countries or regions with a restricted geographical and/or linguistic area.' For methodological purposes (to allow comparison with the predecessor and current programmes) these priorities have been treated as similar.

³⁶⁷ The perceived effectiveness of the MEDIA Sub-programme has more than doubled among MEDIA survey respondents from low PCCs. One could draw parallels with the more than double the number of projects supported from these countries under the Development Single scheme.

³⁶⁸ It has to be noted, as detailed in the LPF note, that achieving a level playing field in production capacity between the countries participating in the MEDIA programme may not be a realistic objective all together. The note defined 'LPF' as 'positive discrimination rules that are aimed to ensure that applicants from low, medium and high PCCs have an equal chance of accessing and drawing benefits from the MEDIA Sub-programme funding' rather than measures that have the potential to level the playing field between countries with different production or distribution capacities.

³⁶⁹ For presentation purposes analysis categories have been simplified merging the 'very effective' and 'effective' as well as 'ineffective' and 'very ineffective' answer options

Figure 6. How effective has the Creative Europe MEDIA Sub-programme been in relation to the following objective: Reduced imbalances in the European audiovisual market (i.e. levelled playing field)³⁷⁰



Source: MEDIA survey (2016)

More specifically, as demonstrated by the analysis in the LPF note in relation to individual MEDIA schemes, and confirmed by the Programme data on the predecessor and current MEDIA spending per PCC (please see 3.3.5.1), the changes to the LPF provisions³⁷¹ introduced with Creative Europe have mostly benefited medium PCCs³⁷². In terms of share of funding, the low PCCs are in fact receiving less under Creative Europe than under predecessor MEDIA.

The LPF note demonstrated that the LPF provisions of the current MEDIA Sub-programme are effective in balancing the way the funding is allocated between different groups of PCCs. As similar provisions were introduced for both low and medium PCCs, the medium PCCs had the capacity to mostly benefit from these measures. The note also clearly showed that 'diversity' and 'competitiveness' general objectives are indeed 'contradictory' in this area of the Programme i.e. if more funds are channelled to support development and distribution of films from low and / or medium PCCs ('diversity' objective) fewer films are supported from high PCCs, considerably reducing the overall potential audiences for European non-national films and associated revenues ('competitiveness' objective)³⁷³.

Because MEDIA LPF provisions are effective in promoting either one of the Creative Europe Programme's general objectives, the LPF note included a discussion of the 'diversity' and 'competitiveness' concepts³⁷⁴, underlining that the meaning of these concepts changes considerably, if they are examined within the Programme, European or global context³⁷⁵. Therefore, defining where the added value of the Programme lies,

³⁷⁰ For presentation purposes analysis categories have been simplified merging the 'very effective' and 'effective' as well as 'ineffective' and 'very ineffective' answer options

³⁷¹ The MEDIA LPF provisions (i.e. eligibility and award criteria) and how these have changed since the predecessor Programme are discussed in the LPF note.

³⁷² As described in the PMF Note, the medium PCC country category was introduced with the current Programme as has led to major improvement in the balance of programmes' support to this group of countries. While this category did not exist under the predecessor MEDIA Programme, it has been used during the study to present MEDIA Survey data in similar PCC categories as currently exist under Creative Europe MEDIA Sub-programme.

³⁷³ The audience numbers reached by films supported from low capacity country is substantially lower than in the case of high capacity countries.

³⁷⁴ These are currently not defined by the Regulation establishing the Creative Europe Programme.

³⁷⁵ Within the programme, diversity and competitiveness of professionals, companies and projects supported by the MEDIA Sub-programme. The diversity and competitiveness on the European level relates to the diversity and competitiveness of the European non-national audiovisual works on offer. If global diversity and competitiveness (rather than European) is considered, the programme should focus on supporting few and large audiovisual works with global appeal.

depends very much on the definition of 'diversity' and 'competitiveness' key concepts, which further should offer strategic orientation for the application of LPF measures³⁷⁶.

3.3.5.2 MEDIA support has made a moderate contribution to scalability of supported companies, in terms of size, portfolios and partnerships³⁷⁷

The MEDIA programmes have had a moderate impact on the scalability of supported companies in terms of company size, development of portfolios and partnerships. The programmes supported a relatively very small share of the audiovisual sector companies: the predecessor Programme supported around 0.5% of all audiovisual companies in the EU, while the current MEDIA Sub-programme caters to the needs of 0.4% enterprises in the sector³⁷⁸.

The MEDIA programmes have helped audiovisual companies to grow, but for only one fourth of all supported companies this growth resulted in permanent employment. The MEDIA programmes have on average increased the workforce of micro companies by 1.4 full time equivalent (FTE), that of small firms by two FTEs and that of medium sized enterprises by four FTEs³⁷⁹. These effects materialised in a context where the number of persons employed per an enterprise in the audiovisual sector fell from 4.9 to 3.3 on average in the period 2008 to 2014³⁸⁰.

However, most of these increases (i.e. 73% or around 4,800) concerned temporary positions which may not have been continued or turned into permanent positions once project funding ended. Further 27% or around 1,800 were permanent positions created by MEDIA programmes in the period 2007-2016. The focused evaluations on the key MEDIA schemes confirm that the programmes support did not have a strong employment impact on supported companies. The programmes' support had impact on employment of freelancers and self-employed persons, but the scale of their contribution in this area needs a more systematic collection of monitoring data to be assessed³⁸¹.

The MEDIA programmes have had some³⁸², but limited effect on the development of portfolios and catalogues of supported projects. The focused evaluation on the MEDIA Development schemes shows that around 5% of companies supported by Development Single Projects were also afterwards successful in applying for Slate Funding³⁸³. The

³⁷⁶ A more detailed analysis of the MEDIA LPF provisions and the related concepts is provided in the LPF note. The note also includes detailed findings as well as general and specific recommendations based on this review. The note was used to develop 'LPF compromise' with the Member States.

³⁷⁷ This sub-section relates to the evaluation question 'To what extent does MEDIA support scalability of companies, through a portfolio approach or structural partnerships?'

³⁷⁸ Around 112,400 companies were active in the audiovisual sector (Motion picture, video and television programme activities) in 2014 at the start of Creative Europe, a 47% increase since the predecessor MEDIA programme began (Eurostat data, 2008 figure, as data for 2007 not available). According to the programme data around 430 companies on average benefited from predecessor MEDIA support annually, compared to around 450 under the current MEDIA Sub-programme.

³⁷⁹ This data is based on the employment created reported by respondents to the MEDIA survey who represented projects supported by the predecessor and current MEDIA programmes, as per the size of the organisation that they reported they represent.

³⁸⁰ Eurostat data. Number of persons employed per enterprise. Motion picture, video and television programme activities.

³⁸¹ The MEDIA focused evaluations looked at the extent supported projects and rejected applicants have employed freelancers. However the samples of projects interviewed were too small to allow any generalisations. In most cases the interviewees were only able to go as far as to confirm or deny that their company used more/less or the same number of freelancers because they received Programme support e.g. of the 14 Development Single and Slate projects consulted eight reported positive programme contribution in this area (including three of the four Slate Funding projects), one reported no impact and one decrease. Only two interviewees were able to estimate the number of people employed (which was 1-2 additional freelancers per project). As recommended in the PMF Note, monitoring data needs to be systematically collected in this area to allow further assessment.

³⁸² Programme data validated through MEDIA focused evaluations and key informant interviews. 54% of all respondents to the MEDIA survey that benefited from MEDIA development schemes reported 'major impact' of the programmes' funding on the scale of their development activities. The same was true for 51% of respondents who benefited from the TV schemes and 48% of respondents who received programmes support for distribution measures.

³⁸³ The Slate Funding scheme supports the redevelopment of batches of audiovisual works (as opposed to development of single project) and has a requirement for the applicant to show previous works completed.

average size of the Distribution Selective groups increased from distributors in 11 countries under the predecessor MEDIA Programme to 16 under Creative Europe. The number of titles in the catalogues of supported VOD platforms increased from 50,000 in 2014 to 70,000 in 2016³⁸⁴.

The MEDIA programmes have made a more considerable contribution to development of beneficiary companies' partnerships. Around half (56%) of the MEDIA survey respondents indicated that the programmes had allowed them to collaborate with new partners from other European countries with whom they had no prior relationship³⁸⁵. A majority of these new partnerships³⁸⁶ have been sustainable³⁸⁷ and some have led to repeated collaborations. The impact of the programmes on partnership building was lower in relation to the MEDIA TV Programming – the results of the focused evaluation for this scheme suggests that two thirds of partnerships were developed without the programmes' support.

3.3.5.3 Culture programmes support most sub-sectors in balanced way, but concerns are raised about the prioritisation of economic objectives³⁸⁸, over artistic and social considerations³⁸⁹

Overall the cultural operators are more reluctant to embrace the new 'competitiveness' general objective of Creative Europe Programme³⁹⁰. A minority of stakeholders consulted considered that the greater programme focus on competitiveness is a strength of the new Programme³⁹¹. For instance, organisations representing various culture sectors on the EU level³⁹² raised objections to the increasing focus of the Culture Sub-programme on economic policy objectives.³⁹³

The Programme data indeed suggests that:

- The current programme supports 45% less projects, compared to the predecessor Culture Programme (please see Section 3.3.9.2 for detail on the outputs of the Culture Sub-programme).

³⁸⁴ Data provided by the EACEA

³⁸⁵ 51% fully agreed that the Programme funding improved the capacity of their organisation to engage in international and transnational cooperation and 47% that the Programme funding had operated as a catalyst to strengthen their international activities i.e. leading to more international activities (answer options were not mutually exclusive).

³⁸⁶ This is supported by MEDIA survey data and two interviews.

³⁸⁷ 64% of respondents to the MEDIA survey indicated that their projects' collaboration with partners was followed up or continued in some form after project closure. This was corroborated by the focused evaluations on the key MEDIA Development and Distribution schemes.

³⁸⁸ The integration of the Culture Programme under Creative Europe has placed it under the competitiveness and growth general objective of the current Programme that did not exist for the Culture programmes before, the change from operating to action/project grants for European Networks, the introduction of the CCS Guarantee Facility are all current Programme design features that signal this shift.

³⁸⁹ This sub-section relates to the evaluation question 'Has Culture sufficiently supported the artistic and economic development of the different cultural sectors?' and 'Has it impacted more on 'traditional' cultural activities or on those with a more pronounced industrial dimension (e.g., music and book)?'

³⁹⁰ Strengthening the competitiveness of the European CCS was not an objective of the predecessor Culture Programme.

³⁹¹ Only around one fifth of all respondents to the Culture survey agree with the statement as opposed to a bit less than one third of MEDIA survey respondents. This is also confirmed by the OPC.

³⁹² Including a three of EU level organisations representing a total of around 700 CCS organisations.

³⁹³ A few stakeholders viewed the predecessor Culture programme as supporting less 'economically focused' cultural sectors and with greater intrinsic value than under Creative Europe. For example, this was seen in the changes made to the Networks scheme under Creative Europe which was seen as challenging for networks which were from sectors with more constrained budgets (such as archives). The change put an emphasis on supporting network activities as opposed to operations as a way to contribute to capacity-building and the structuring of particular culture subsectors. This change reduced the advocacy role of Network projects and gave the scheme a more narrowly defined focus.

- The average size of projects supported by the Culture Sub-programme has more than doubled³⁹⁴ compared to the predecessor period.
- There is a smaller share of grants below €100 thousand and projects managed by operators from medium and smaller countries (please see Table 9 in Section 3.3.5 for detail).
- The current Culture Sub-programme supports one third less (unique) operators per year on average, compared to its predecessor (please see Section 3.3.9.2 for detail on the outputs of the Culture Sub-programme).

At the same time the results of the Culture survey suggest that:

- The size of operators benefiting from the Culture programmes has changed very little, and in fact the beneficiaries of the current Programme are slightly smaller than those of the predecessor³⁹⁵.

The increasing size of the projects can be seen as an aspect of Creative Europe's increased orientation towards market rationale³⁹⁶ and is also likely to shift the implementation towards organisations and counties that have more experience in managing larger projects.

While many projects supported by the Culture programmes are transdisciplinary³⁹⁷, making it hard to pinpoint their sector coverage, they are open to and accessed by a range of different cultural sectors, including those with and without a marked industrial dimension. Under Culture Sub-programme of Creative Europe:

- Cooperation projects are open to operators from all sub-sectors, although the sub-sectors that benefit the most from this scheme are: visual arts; performing arts: theatre, street arts and circus arts. Performing arts dance and Design and applied arts and architecture benefit least.³⁹⁸
- European Networks scheme covers a broad range of sub-sectors³⁹⁹ and the award of Network project funding to BEDA⁴⁰⁰ is seen as an example of coverage beyond 'traditional' culture sub-sectors. Analysis of the scheme's coverage suggests only one gap in coverage: literature, books, and reading sub-sector⁴⁰¹.

³⁹⁴ An average award to a project supported by predecessor Culture Programme was €196 thousand compared to €409 thousand under the current Culture Sub-programme. The predecessor Programme supported 1,855 projects with the total budget of €364 million. €179 million have been already spent under the current Culture Sub-programme, providing support to 437 projects.

³⁹⁵ Under the predecessor Programme 88% of the operators were micro, small or medium-sized. Under the current this share has increased by 3 percentage points to 91%.

³⁹⁶ It may be necessary, if the intent is for the projects to have a truly transnational dimension and critical mass to pursue the Programme objectives.

³⁹⁷ 44% of Culture survey respondents are active in more than one sub-sector

³⁹⁸ Based on mapping of final reports for 2014, application data review and key informant interviews, included in the FE on Cooperation projects (pgs. 20-21). The FE analysis was further triangulated with the programme data (on Sub-programme spending on this scheme) and Culture survey data (providing the share of beneficiaries supported by sub-sector). The evaluation also looked at the possibility to put the Culture Sub-programme spending per sub-sector in the context of the size of the different sub-sectors as measured by no. of employed persons in these sectors. However, this analysis is currently not possible because Eurostat sector categorisation does not match that used by the programme.

³⁹⁹ Current Network projects cover: Visual arts; Cultural heritage; Design and applied arts and architecture; Performing arts: music and opera; Performing arts: theatre, street arts, circus arts, and puppetry; Performing arts: dance. Literature, books, and reading is not covered.

⁴⁰⁰ Bureau of European Design Associations, from the Design and applied arts and architecture sub-sector

⁴⁰¹ It could be argued that this gap is at least partially covered by the Literary Translation scheme supported by the Culture Sub-programme.

- European Platforms scheme covers most sub-sectors, even though the Sub-programme aims to support and has funded⁴⁰² a relatively small number of projects.⁴⁰³ Two stakeholders commented that the scheme is open to a wide range of sub-sectors.

Based on the estimates produced by combining survey and programme data⁴⁰⁴, support provided by the Culture programmes to sub-sectors has been relatively stable, but with minor differences between the current and predecessor programmes: support to Visual arts increased by 4% (or around €2 million yearly) while support to Performing arts: Dance decreased by 3% and Cultural heritage and Performing arts: music and opera decreased by 2%. The Culture programmes support to other sub-sectors remained roughly on the same level (please see Table 10 for detail).

Table 10. Estimation of the Culture programmes support by culture sub-sector⁴⁰⁵

Culture sub-sectors	Participation in sub-sectors of the Culture programmes	Culture programmes (million EUR)	Culture programmes annual (million EUR)	Participation in sub-sectors of Culture 2007-2013	Culture 2007 (million EUR)	Culture 2007 annual (million EUR)	Participation in sub-sectors of Culture (2014-2015)	Culture 2014-2015 (million EUR)	Culture 2014-2015 annual (million EUR)
Visual arts	17%	79	8.8	15%	53	7.6	19%	21	10.5
Cultural heritage	16%	72	8.0	17%	58	8.3	15%	17	8.5
Design and applied arts and architecture	8%	35	3.9	7%	24	3.4	8%	9	4.5
Literature, books and reading	5%	25	2.8	5%	19	2.7	5%	6	3
Performing arts: music and opera	15%	67	7.4	16%	54	7.7	14%	15	7.5
Performing arts: dance	10%	47	5.2	12%	42	6.0	9%	10	5
Performing arts: theatre, street arts, circus arts and puppetry	18%	83	9.2	18%	62	8.9	18%	20	10
Other	11%	48	5.3	10%	34	4.9	11%	12	6
Total	100%	457	50.8	100%	346	49.4	100%	111	55.5

Source: Culture survey (% of respondents by Culture sub-sector), Programme data (yearly funding)

⁴⁰² Creative Europe annual work programmes for the period 2014-2016 state that support of 'about 10 platforms' was planned. The Programme data shows that five platforms were supported in 2014, nine in 2015 and eight in 2016.

⁴⁰³ Based on analysis of selected projects. Covered: Design and applied arts and architecture; Literature, books, and reading; Performing arts: music and opera; Visual arts; Performing arts: dance; Performing arts: theatre, street arts, circus arts, and puppetry. Not covered: Cultural heritage

⁴⁰⁴ Analysis of the survey respondents provides a crude indication of the breakdown of distribution of support by sub-sector, and so evidence of the change between programmes. This was corroborated with the spending on literary translation for the total period of Culture programmes under evaluation (2007-2016). The results obtained had an error of one percentage point.

⁴⁰⁵ Table shows the total Culture programmes, predecessor Culture programme and Culture Sub-programme budget allocation per culture sub-sector based on the shares of respondents to the Culture survey (representing projects supported by the predecessor and current Culture programmes).

3.3.5.4 Activities supported by the Culture programmes contribute to creation of a 'European cultural space'⁴⁰⁶, and through it to their general objective of promoting diversity⁴⁰⁷

Most of the Culture Sub-programme schemes include a specific focus on audience development, aiming to bring European cultural works to non-national audiences⁴⁰⁸. Cooperation Projects support transnational mobility of cultural works, Platforms contribute to audience development through innovation and use of digital technologies, and Literary Translation projects are central to the creation of a shared 'European cultural space', as they produce translations of a high literary value.

Supported projects are reaching out to new audiences across all these schemes. In relation to Platforms and Cooperation projects, survey respondents reported improved skills around audience development, which can be expected to contribute to their organisations' capacity to reach out to new audiences⁴⁰⁹. The contribution of Culture schemes to transnational mobility of creative and cultural players, especially under Cooperation Projects, is also likely to have a significant impact on the creation of a shared cultural space⁴¹⁰.

The results of the Culture focused evaluations highlight several examples where Cooperation projects and European Platforms have created new areas of cooperation, including virtual European cultural spaces, or re-established cultural ties where these have been lost for historical reasons. There is also qualitative evidence that Platform projects have helped operators to strengthen their identification as a part of a culture sub-sector that has further allowed them to identify common European challenges and share good practices to address them.

The extent to which projects supported by the Culture programmes have contributed to the specific objectives of audience development and mobility is further assessed in sections 3.3.8.3 and 3.3.9.2. Evidence collected on the extent to which Culture-supported projects contribute to a shared 'European cultural space' is limited⁴¹¹. This is because project reports often do not differentiate between reach into new or existing audiences. There is also no evidence of the extent to which visiting or enjoying the cultural and creative works supported by the Culture programmes have impacted on the aspirations or shared values of their audiences⁴¹².

⁴⁰⁶ The concept of 'European cultural space' was defined in the LPF note, pg. 8. The assessment of the contribution of the Culture Sub-programme to a European cultural space relates primarily to the extent the projects and CC works supported by the Culture programmes have created aspirations and values which are shared among CC players and their audiences. A shared European cultural space may be considered as one within which there are shared cultural values, but also one with a shared body of cultural works which incorporates and express these values.

⁴⁰⁷ This section provides key findings in relation to the evaluation question 'To what extent have the Culture Sub-programme and predecessor programme supported activities contributed to the creation of a European cultural space?' The Tender Specifications limited the scope of this question to the contribution of the Culture Sub-programme, while it could be argued that this question would have been relevant also for the MEDIA Sub-programme and the Creative Europe Programme as a whole.

⁴⁰⁸ Networks aim at strengthening the capacity of the cultural and creative sectors to operate trans-nationally, rather than in providing direct to consumer outputs

⁴⁰⁹ This is substantiated by evidence from the Culture survey and interviews.

⁴¹⁰ In this area survey data suggest a slightly stronger impact of Creative Europe than predecessor Culture programme

⁴¹¹ The respondents to the Open Public Consultation overwhelmingly acknowledged the importance of Creative Europe to contributing to the strengthening of the European Cultural Space. However, the vast majority of them considered that more can be done in promoting Europe as a cultural space as opposed to an area sharing common economic interests. The promotion of inter-cultural dialogue and exchanges was often cited as a feature of the programme which could be enhanced vis-à-vis the creation of the European Cultural Space.

⁴¹² The evaluation design did not include data collection activities among the ultimate beneficiaries (e.g. audiences) of projects supported by the Programme. As no Programme monitoring data has been collected on any indicators that could have been used for assessing the Programme contribution to 'European cultural space' data available on this question was scarce. Indicators that could be used for measurement in this area are included in Section 4, listing the recommendations of this study.

3.3.6 The Creative Europe and its Sub-programmes have been fairly effective in achieving most of their specific objectives and priorities, but...

Creative Europe Sub-programmes have been fairly effective in achieving most of their specific objectives and priorities⁴¹³. Because of the number of specific objectives (four) and sub-programme priorities (15 in total across both sub-programmes, seven for MEDIA and six for Culture Sub-programme), the effectiveness assessment in this section is organised around tables triangulating the key evidence (more detailed data on the results and impacts of the current Programme is presented in Section 3.3.9).

As illustrated in Table 11, Creative Europe is overall perceived to be very effective in promoting the transnational circulation of cultural and creative / audiovisual professionals and works, as well as and increasing their capacity to operate internationally. However, both sub-programmes (i.e. the Programme as a whole) have been relatively⁴¹⁴ less effective in pursuing the specific objective of increasing access to European cultural and creative works by underrepresented groups⁴¹⁵.

Table 11. Extent Creative Europe has been effective in reaching its specific objectives

Specific objective	Effectiveness ⁴¹⁶	Key evidence	Surveys' results	OPC results ⁴¹⁷
Support the capacity of the European CCS to operate transnationally and internationally	++	763 MEDIA development projects supported (including feature films, animations, documentaries and video games), 165 TV productions supported 171 MEDIA training projects supported, more than 5,000 professionals trained 211 Culture Cooperation projects, 23 European Networks and 8 European Platforms supported	80% ⁴¹⁸	85% ⁴¹⁹
Promote the transnational circulation of CC works and transnational mobility of CC players, as well as to reach new and enlarged audiences, with a particular focus	++	Around 4,200 MEDIA Distribution projects supported, including 57 projects promoting online distribution 435 projects supported promoting access to professional markets and audiences (e.g. festivals) Supported around 297,900 mobility experiences under Culture (17% of all those employed in the sectors in 2015) Contributed to at least 205 million admissions to European films ⁴²⁰	80%	85%

⁴¹³ Each specific objective and priority includes a number of components. These were separated in order to allow the survey respondents to comment on each component as a part of an integrated list.

⁴¹⁴ If compared to the Programme performance in regard to most other objectives.

⁴¹⁵ For instance, the respondents to the Open Public Consultation found it difficult to apply when the support sought comes from and or targets underrepresented groups. Most of the comments from the respondents of the OPC is this priority is not high enough in the hierarchy of Creative Europe's priority.

⁴¹⁶ Here and in the other similar tables evaluators' assessment based on the available data

⁴¹⁷ As demonstrated by the figures in the tables presented in this section, the strengths and weaknesses of the Creative Europe Programme in terms of addressing its specific objectives and priorities are confirmed by the OPC results, which aside positions of programme beneficiaries also reflect those of other (wider) Programme stakeholders (53% of the OPC respondents have not received financial support from the current Programme).

⁴¹⁸ Combined share of respondents to the MEDIA and Culture surveys (n=752-766) that reported the programme 'effective' or 'very effective' in relation to the particular objective.

⁴¹⁹ Creative Europe OPC results, share of respondents who reported that the Programme has been very, largely or moderately effective in achieving its objectives (n=502-507).

Interim evaluation of the Creative Europe Programme and ex-post evaluation of the Culture, MEDIA 2007 and MEDIA Mundus programmes

Specific objective	Effectiveness ⁴¹⁶	Key evidence	Surveys' results	OPC results ⁴¹⁷
on youth and under-represented groups	+-	Contributed to at least 3.2 million people reached, of which around estimated 50% (1.64 million) focused on youth ⁴²¹	48% ⁴²²	NA
Strengthen the financial capacity of SMEs and micro, small and medium-sized organisations in the CCS, aiming for balanced geographical coverage and sector representation	+	€121 million to be allocated to support CCS SME investment, of which 17% already committed ⁴²³ 61% of beneficiaries report improved market position or turnover due to Programme support ⁴²⁴ While the CCS Guarantee Facility is a market demand based instrument, criteria for intermediary selection include geographical and sector coverage considerations	62%	75%
Foster policy development, innovation, creativity, audience development and new business and management models through support for transnational policy cooperation	+	44 projects supported under the new MEDIA audience development line with total of €6 million allocated in grants ⁴²⁵ Eight policy development activities supported with the total investment of €4.7 million ⁴²⁶ Increased support for online distribution aiming to tap on growing consumption of audiovisual works online ⁴²⁷ .	64%	77%
++ Very effective, + Effective, +- Moderately effective, - Ineffective, -- Very ineffective				

Source: ICF analysis (unless otherwise specified in the footnotes)

In relation to achieving its specific objectives the current Programme has 'inherited' weaker performance in some areas already identified under the predecessor programmes⁴²⁸ (presented in the earlier sections 3.3.4.1 and 3.3.4.2):

⁴²⁰ Please see Table 9 above. These are only the admissions for the key MEDIA Distribution schemes. It is too early assess the admissions for the AV works developed with the support of the current Programme. There is currently no data available on the extent supported TV productions have generated audience in Europe and elsewhere.

⁴²¹ It is impossible to estimate the Programme focus on underrepresented groups as this category has not been defined for monitoring purposes, not any data collected on reach into this priority target group. The survey and key interviews data suggest that the effectiveness of Programme in this area is low.

⁴²² There was a separate question included in both MEDIA and Culture surveys to assess the Programme effectiveness in this area.

⁴²³ By May 2017. In the beginning of 2017 three selected financial intermediaries, benefiting from the support of the CCS Guarantee Facility, started to provide their services to CCS SMEs in Spain, France and Romania.

⁴²⁴ Of these 25% report major impact and further 35% moderate impact. Combined results of MEDIA and Culture surveys (n=749).

⁴²⁵ Currently there is no monitoring data available on the number of beneficiaries reached or types of tools or methodologies developed by these projects.

⁴²⁶ Policy development activities supported under the Cross-sectoral strand, including Presidency conferences, the EAO membership, studies and evaluations.

⁴²⁷ The Creative Europe 2017 Annual Work Programme suggests that the budget for the MEDIA Online scheme will be almost doubled (increase from €5.6 for €9.5 million) to stimulate innovation and the development of new business models for distribution and promotion as well as strengthening the offer and showcasing ready made offers of European films available on online platforms, thereby aiming to increase access to those films.

- While still effective, the performance of both Sub-programmes is still perceived to be less strong in relation to enhancing innovation and creativity^{429,430}.
- Similarly to the predecessor MEDIA Programme, the current MEDIA Sub-programme was perceived to be the least effective in reducing markets' imbalances, although considerable progress in this area has been made and performance of the current Programme in this area has improved (please see Section 3.3.5.1 for more detail).
- The same as for the predecessor Programme, the current Culture Sub-programme is still perceived as the less effective in improving the financial capacity of the supported operators and promoting access to culture for underrepresented groups⁴³¹, although as highlighted above this is an area where the Programme as a whole could do more.

In relation to sub-programmes priorities, as illustrated by Table 12 and Table 13, Creative Europe has so far been the most effective in supporting the development of capacity for transitional work among programme beneficiaries and contributing to the development and circulation of European CC works. The programme overall could be more effective in relation to audience development priorities of both sub-programmes. Further assessment of Creative Europe effectiveness in pursuing sub-programme priorities is provided in the tables below.

Table 12. Extent MEDIA Sub-programme has been effective in reaching its priorities

MEDIA priorities	Effectiveness	Key evidence	Survey results	OPC results
Facilitate acquisition and improvement of skills and competences of AV professionals	+	Around 60% of the MEDIA training participants report improved skills and competences ⁴³² MEDIA training supports 0.2% of all EU employed in the audiovisual sector ⁴³³	64% ⁴³⁴	74% ⁴³⁵
Increase capacity of AV operators to develop works with	++	MEDIA Development schemes Single Projects and Slate Funding support estimated 30% of all films produced in Europe each year ⁴³⁶	80%	78%

⁴²⁸ The specific objectives for these programmes were however defined in different terms, so trends can be seen more across the different 'areas of intervention' rather than in relation to particular specific objectives.

⁴²⁹ Around 64% of respondents to the MEDIA survey (n=390) and 66% to the Culture survey (n=362) indicated that the programmes were effective or very effective in relation to this specific objective.

⁴³⁰ The respondents to the Open Public Consultation also responded that more could be done to support innovative business models or new forms of art (i.e. via prototyping, emerging technologies) and cross sector (e.g. inter-disciplinary) approaches to innovation. Capacity building and exchanges of practices around innovation also features in the comments of the respondents to the OPC.

⁴³¹ Currently underrepresented groups is only mentioned as a particular focus on the Culture Cooperation projects. They are not mentioned in the Guidelines of the other two key Culture schemes – European Networks and Platforms. There has been no systematic monitoring of the extent underrepresented groups are benefiting from the Culture projects. Indicators for this monitoring have been proposed in the PMF Note. The Note also offers operational definitions for the key 'underrepresented groups'. Because of the lack of monitoring data it is currently not possible to assess the Sub-programme reach in these priority groups.

⁴³² Please see section 3.3.9.1 for more detail.

⁴³³ Using the EACEA data on the number of training participants each year (2014 and 2015 is available) and the Eurostat data on the total annual EU employment in the sector, also assuming that there are not repeat training beneficiaries during the year or across the years. Making the same assumptions, and taking the 2015 employment figure as a constant, current MEDIA Sub-programme will support 1.4% of all professionals in the sector by 2020.

⁴³⁴ Share of respondents to the MEDIA survey that reported the Sub-programme 'effective' or 'very effective' in relation to the particular priority (n=394-397).

⁴³⁵ OPC results in relation to the MEDIA Sub-programme priorities (n=384-390), sum of respondents who reported that the programme contributed to a priority 'to a moderate', 'to a large' or 'to a very large' extent.

⁴³⁶ Estimation based on the EAO data on the yearly number of feature films produced in 2014 (in countries eligible for MEDIA support) and the number of titles supported by Single Projects and Slate Funding schemes that year (for Slate Funding scheme

MEDIA priorities	Effectiveness	Key evidence	Survey results	OPC results
transnational circulation potential		<p>MEDIA Development schemes and support to production of TV Programming foster international competitiveness due to partnerships⁴³⁷ created that lead to audiovisual works with high international circulation potential⁴³⁸</p> <p>Development Single Projects and Slate Funding increasing the capacity to invest in the development of European audiovisual works⁴³⁹</p> <p>Coproduction funds supported in five countries (FR, DE, IT, NL, and NO) with total investment of €1.7 million</p> <p>MEDIA supported 25 video games development projects with the total investment of €2.7 million</p> <p>Around 5% of companies supported under Single Projects use the project as a stepping stone for Slate Funding, while Slate Funding consolidate beneficiary position on global markets⁴⁴⁰</p>		
Encourage B2B exchanges to increase the visibility of their works on international markets	++	<p>MEDIA has supported 63 (Access to Markets and MEDIA stands⁴⁴¹) projects aiming to foster B2B exchanges to showcase European audiovisual works for the total value of €32.2 million</p> <p>8% of the Access to Markets (€1,9 million) is devoted to the development of five B2B online tools⁴⁴²</p>	NA ⁴⁴³	75%
Support transnational theatrical distribution and marketing of audiovisual works	++	<p>MEDIA Distribution schemes combined (Automatic, Selective and Sales agents) contribute to the distribution of around 27% of all annual European titles produced⁴⁴⁴</p> <p>17% of the Total MEDIA budget or 40% of the MEDIA Distribution schemes' funds are channelled to promotion of European films for release in cinemas⁴⁴⁵</p>	94%	78%

number of titles estimated based on average per one slate (3.9), identified via mapping undertaken in the context of the Focused Evaluation on this scheme).

⁴³⁷ During the period 2014-2015 Single Projects had 1.8 partners on average, hence the 447 projects supported in the period involved around 800 partnerships, including 120 international ones.

⁴³⁸ Focused Evaluations on Single Projects and Slate Funding pg. 25; as well as TV Broadcasting and TV Programming schemes, pg. 19

⁴³⁹ Focused Evaluation on Single Projects and Slate Funding schemes

⁴⁴⁰ Focused Evaluation on Single Projects and Slate Funding schemes, pgs. 29 and 7.

⁴⁴¹ In the key annual European markets: Berlin, Cannes, MIPCOM and MIPTV trade fairs. The stand assembles around 200 European companies, under one MEDIA umbrella, around 60% from the high PCCs, but effort is made to involve companies from low PCCs. This scheme would benefit from more demand for participation.

⁴⁴² Cineuropa and Film New Europe are information tools for European cinema professionals, meeting different needs. Cineuropa has general coverage, while Film New Europe focuses on the Eastern and Central European and Baltic region. The other three projects are platforms: Olffi.com a project in the field of financing, centralising key information pertaining to financing and production, Festival Scope a platform dedicated to the promotion of art-house films to audiovisual professionals and Cinando a networking tool and a database for film professionals offering a gateway into the film industry currently existing in three languages: English, Spanish and Chinese. (MEDIA Implementation report 2015)

⁴⁴³ Question on this priority was not included in the survey / OPC, due to the length and user-friendliness considerations

⁴⁴⁴ Calculation based on the latest EAO data on the number of European feature films produced per year (2014) divided by all the unique European titles supported by the MEDIA Distribution schemes

⁴⁴⁵ Based on Programme data for the period 2014-2016, total spent on Automatic Module 3, Distribution Selective and Sales Agents Module 2 as a share of total spending on these distribution schemes.

MEDIA priorities	Effectiveness	Key evidence	Survey results	OPC results
		10% of the entire MEDIA budget and 22% of distribution funds support Europa Cinemas ⁴⁴⁶		
Promote distribution and marketing of AV works on non-theatrical platforms	+	5% of the total MEDIA budget and 12% of the total distribution budget are allocated to support online distribution and marketing of European audiovisual works	NA	69%
Support audience development for European AV works	+	2% of the total MEDIA budget in the period 2014-2016 was spent on audience development 89% of respondents report that Programme increased the visibility of European audiovisual works ⁴⁴⁷ 69% of respondents indicated that the Programme increased audiences' access to their works ⁴⁴⁸	59%	75%
Promote new distribution modes to support emergence of new business models	+	Action 3 of the Online distribution scheme support experimental projects that examine issues such as 'day and date' releases, offering possibilities to share the national promotion campaign costs and benefiting people who have no access to cinemas, but have access to content online.	63%	65%
++ Very effective, + Effective, +- Moderately effective, - Ineffective, -- Very ineffective				

Source: ICF analysis (unless otherwise specified)

Table 13. Extent Culture Sub-programme has been effective in reaching its priorities

Culture priorities	Effectiveness	Key evidence	Survey results	OPC results
Support development of skills of CC professionals that strengthen the CCS	+	83% of respondents identified development of skills and competences an primary or secondary objective of their supported Culture project ⁴⁴⁹ 76% of respondents report their project was effective on this priority ⁴⁵⁰ ; European Network projects led to around 400 improved learning or skills experiences in 2014 ⁴⁵¹ 47% report having improved competences and knowhow of digital technologies; 70% improved knowledge of innovative approaches to audience development; 60% improved knowledge of innovative approaches to marketing and distribution of cultural and creative works; and 54% improved knowledge of new business and management models in the cultural and creative sectors ⁴⁵²	76% ⁴⁵³	64% ⁴⁵⁴

⁴⁴⁶ A 2016 performance audit of this Network found that the effectiveness of the network could be improved in a number of areas.

⁴⁴⁷ MEDIA survey, n=70

⁴⁴⁸ MEDIA survey, n=393

⁴⁴⁹ Culture survey, n=350

⁴⁵⁰ Culture survey, n=279

⁴⁵¹ FE on Culture Networks and Platform projects, pg. 27.

⁴⁵² Culture survey, responses to the question 'To what extent has your project contributed to the development of the following skills of cultural players involved in your project?' n=367, 367, 363 and 364 respectively.

Culture priorities	Effectiveness	Key evidence	Survey results	OPC results
Promote international cooperation between CC players to internationalise their carriers	+	Crude estimation ⁴⁵⁵ places the number of cultural and creative players who have benefited from the key Culture schemes at 305,200 or around 17% of all employed in the sectors in 2015 ⁴⁵⁶ Estimated 297,900 international mobility experiences provided by European Cooperation Projects and Networks ⁴⁵⁷ 88% of Culture projects had the development of capacity of cultural players to operate internationally (internationalise their carriers and activities) as a primary or secondary objective ⁴⁵⁸	76%	67%
Provide support to strengthen European CC organisations and international networking to facilitate access to professional opportunities	++	Culture projects provide access to international networks of cultural professionals that lead to carrier opportunities ⁴⁵⁹ 95% of Culture projects report international networking among cultural and creative organisations and promoting access to professional opportunities as a primary or secondary objective ⁴⁶⁰	82%	75%
Support international touring, events, exhibitions and festivals	+	In relation to completed projects 98% of respondents indicated that all (59%) or most (39%) of the expected results/outputs have been delivered ⁴⁶¹ In relation to on-going projects 48% of respondents reported that all and 40% that	76%	69%

⁴⁵³ Share of respondents to the Culture survey that reported the Sub-programme 'effective' or 'very effective' in relation to the particular priority (n=362-368) or that their project was 'effective' or 'very effective' in relation to this particular priority (n=279-325).

⁴⁵⁴ OPC results in relation to the Culture Sub-programme priorities (n=254-261)

⁴⁵⁵ To date there has been no systematic monitoring against this indicator across all the key Culture schemes. Indicators for measurement against this priority (and all other Culture Sub-programme priorities) have been proposed in the PMF Note.

⁴⁵⁶ Assuming each cooperation project had 273 partners, Networks led to around 3500 mobility experiences per year, each Platform project engaged on average 130 artists / professionals and each translation project involved at least one translator and one editor (findings of the Culture FEs), plus one person per each 'unique' Culture Sub-programme beneficiary, and that each participant only took part in the programme only once. Eurostat data on culture sectors' employment in 2015 (Creative, arts and entertainment activities; and Libraries, archives, museums and other cultural activities combined) was used as a figure for total EU employment in the sectors.

⁴⁵⁷ Findings of the FE on Culture Networks and Platforms indicate that networks contributed to 3,462 mobility experiences per year. This figure has been extrapolated here for the three years of the current Programme. Measurement of Programme achievements in this area would benefit from a more systematic monitoring across all the key Culture Sub-programme schemes. Indicators for measurement in this area have been proposed in the PMF Note.

⁴⁵⁸ Culture survey, n=354. There is currently no monitoring data available on the share of artists and professionals that report international carrier opportunities due the Sub-programme support. This indicator has been added to the PMF.

⁴⁵⁹ Findings of the interviews under taken in the context of Culture FEs. However, the samples of these interviews were too small to make any extrapolation as to the size of this networking and the number of opportunities.

⁴⁶⁰ There is currently no monitoring data available on the share of artists and professionals that report that the participation in the supported project has led to professional opportunities during the past year that would not have resulted otherwise. This indicator has been added to the PMF.

⁴⁶¹ Culture survey, n=61. It is currently not possible to provide an indication of the number of activities delivered under the Culture Sub-programme by type. This is due to heterogeneity of activities supported under the key Culture schemes (except for the Literary Translation scheme) and the lack of systematic monitoring against a unified indicator that has been proposed by this study in the PMF note.

Culture priorities	Effectiveness	Key evidence	Survey results	OPC results
		most of their intermediary results/outputs have been delivered ⁴⁶²		
Support circulation of European literature	++	Around 1,400 translations supported Estimated 1.6 million printed or to be printed Estimated 1.4 million books sold (average programme contribution per book sold €8.4) Estimated 3,500 promotional activities by supported Literary Translation projects ⁴⁶³	83%	84% ⁴⁶⁴
Support audience development to stimulate interest and improve access to European CC works and heritage	+	Estimated 3.2 million people reached by the key Culture schemes (Cooperation Projects, Culture Networks and Platforms); Estimated reach into youth priority target group – 1.6 million Estimated target audience for promotional activities of supported Literary Translation projects – 1.7 million people.	62%	74%
++ Very effective, + Effective, +- Moderately effective, - Ineffective, -- Very ineffective				

Source: ICF analysis (unless otherwise specified)

3.3.6.1 Effectiveness of the sub-programmes could be improved by increased focus on audience development activities, facilitating access to European cultural and creative works to underrepresented groups, strengthening the financial capacity of culture operators and further consolidating the audiovisual sector

The Creative Europe Programme could be more effective in addressing its audience development and inclusion specific objectives. The MEDIA programme needs to continue its efforts to consolidate the European audiovisual sector, while the Culture Sub-programme could also do more to strengthen the capacity of the cultural and creative operators, an effort that needs to be supported by wide and balanced sub-sector coverage of the CCS GF.

Audience development⁴⁶⁵ is a welcome⁴⁶⁶ addition to the Creative Europe Programme's priorities⁴⁶⁷ that did not exist for the predecessor programmes⁴⁶⁸. Stakeholders consulted

⁴⁶² Culture survey, n=311. At the time the Culture survey was conducted (September to October 2016) most Culture projects were still ongoing. Only 16% of beneficiaries reported that their project has been completed, while 84% reported on an ongoing project. Hence the monitoring in this area is still to be undertaken.

⁴⁶³ Findings of the FE on Culture Literary translation projects.

⁴⁶⁴ A large share of respondents (43%) to this question indicated that they do not know the answer to this question. The 'I don't know' category has been removed in the presentation for this question (n=100). The percentage includes a sum of responses that indicate that the Culture Sub-programme has achieved the priority of supporting the circulation of European literature 'to a very large extent', 'to a large extent' and 'to a moderate extent'.

⁴⁶⁵ Audience development is a separate scheme under the MEDIA Sub-programme that promotes film education in Europe via a wide range of education and support initiatives enveloping methodologies, strategies, tools, film catalogues and other opportunities for young people. Around €2 million are spent by the MEDIA Sub-programme annually on these activities (i.e. around €6 million have been spent in total during the first three years of Creative Europe).

⁴⁶⁶ As demonstrated by the results of the OPC, MEDIA and Culture surveys as well as key informant interviews.

⁴⁶⁷ Audience development is listed as a priority separately for both MEDIA and Culture Sub-programmes by the current Regulation. MEDIA Sub-programme priorities list 'testing new approaches to audience development' and 'supporting audience development as a means of stimulating interest in, and improving access to, European audiovisual works' under Article 9 of the

considered their respective sub-programme as effective in pursuing the audience development priority⁴⁶⁹. Interviewees confirmed that 'audience development' is an area where more could be done by the sector organisations but also at Programme level. It was mentioned that it will be important to focus not only on the *quantity* of people reached, but on the *quality* of the interaction, this would allow to achieve better and more long-term results.⁴⁷⁰

Similarly to the predecessor Culture Programme⁴⁷¹, both the current Culture and MEDIA sub-programme could be more effective⁴⁷² in promoting underrepresented groups' access to creative and cultural / audiovisual works. Two EU level stakeholders interviewed mentioned that to reach young people and disadvantaged groups additional budgetary resources are required as well as cooperation with the relevant institutions in developing integrated and long-term strategies.⁴⁷³ One of these interviewees further noted that work with the disadvantaged groups in the most effective on the local and regional level.

Stakeholders consulted⁴⁷⁴ stated that the MEDIA Sub-programme needs to continue its efforts to consolidate the European audiovisual sector. This was confirmed by a number of interviewees that recognised the ability to create networks among audiovisual players as a great benefit of the Creative Europe Programme, but not fully exploited under the MEDIA sub-programme. Some stakeholders would suggest to develop schemes devoted to the creation of such networks of professionals⁴⁷⁵ in order to intensify their collaboration and the sharing of knowledge.⁴⁷⁶

Stakeholders consulted⁴⁷⁷ deemed the programme support in this area as effective and noted that it also increased the links or cooperation between audiovisual sector operators.

The Culture Sub-programme has been the least effective in strengthening the financial capacity of the operators in the CCS⁴⁷⁸. The results of the Culture focused evaluations further indicate that the Sub-programme support does improve the financial stability of

Regulation. The Culture Sub-programme priorities (listed in Article 12) largely mirror these formulations but relate them to 'European cultural and creative works and tangible and intangible cultural heritage.'

⁴⁶⁸ Around 2% of the annual MEDIA budget has been spent on audience development. Of the 10 Audience development projects that provided responses to the MEDIA survey in relation to the Audience development activities, four reported 'major impact', four 'minor impact' and two 'moderate impact' of their projects in increasing film literacy. Audience development is also a transversal priority for the projects supported by the Culture Sub-programme. The focused evaluation on the Cooperation Projects shows that audience development was a priority of 12 out of 14 projects subject to more in-depth review.

⁴⁶⁹ Overall, 59% of the MEDIA and 62% of Culture survey respondents indicated that their respective sub-programme has been either 'very effective' or 'effective' in pursuing the audience development priority. 69% of MEDIA respondents further indicated that their Sub-programme has made a 'major' (31%) or moderate (38%) impact in improved access to audiovisual works among audiences. The same was true for 81% of Culture survey respondents – 37% reported 'major impact' and 44% 'moderate impact' in this area. A total of 88% of Literary translation projects reported 'major impact' (61%) or 'moderate impact' (27%) of the Culture Sub-programme funding on improved access to literary works translated among audiences.

⁴⁷⁰ Opinion expressed by three representative organisations.

⁴⁷¹ Note that there was no priority focusing on 'inclusion' under the predecessor MEDIA Programme.

⁴⁷² This could be done by including these groups as priority target groups in Guidelines for all relevant Culture schemes would be a start. In addition, incentivising projects to work with these groups through selection criteria, if necessary would take this one step further. Then monitoring in this area (using the newly developed indicators) and reporting on monitoring results would create another layer of awareness (among projects and potential projects that this is area where the Programme wants to improve performance). See also the section on recommendations.

⁴⁷³ One organisation representing with around 60 member organisations in 50 countries, the other more than 70 members, including sector, national and international organisations.

⁴⁷⁴ According to the surveys' results only 49% of respondents judged the MEDIA Sub-programme and 47% Culture Sub-programme 'very effective' or 'effective' in relation to this priority.

⁴⁷⁵ This could be similar to the networks supported under the Culture Sub-programme.

⁴⁷⁶ Opinion expressed by six representative organisations.

⁴⁷⁷ A moderate share of 54% of respondents to the MEDIA survey judged the Sub-programme 'very effective' or 'effective' in this area.

⁴⁷⁸ Only 48% of respondents to the Culture survey judged the Sub-programme 'very effective' or 'effective' in this area

participating organisations during the project, but there is little evidence of the wider impact of the support on the financial standing of the beneficiaries' organisations. They also suggest that many cultural organisations are likely to be operating under significant financial constraints due to the reluctance of investors to lend to the sector⁴⁷⁹. In this sense, many stakeholders pointed out that there would be a need for increasing the Creative Europe budget in order to enlarge the pool of beneficiaries and to strengthen the position of those organisations, in the culture sector in particular, that have more difficulties in securing source of funding.⁴⁸⁰

3.3.6.2 Contribution of the Creative Culture Sector Guarantee Facility (CCS GF) to priorities of the Cross-sectoral Strand is limited to date but increasing

Article 14 lists the two priorities for the Cross-sectoral Stand, in relation to the CCS GF, which stipulate that it should facilitate SMEs/organisations in the sector access to finance and improve the capacity of participating financial intermediaries in working with CCS and their projects. The achievements of the Cross-sectoral Stand relating to these priorities are presented in this subsection.

The CCS GF started to operate two years after the start of the Creative Europe programme⁴⁸¹. The delay is due to the fact that the budget authority only made the budget available in 2016⁴⁸². It is likely that this postponement has had a negative impact on the access to finance of SMEs in the audiovisual and cultural sectors in Europe at a time where public spending on these sectors have been decreasing in real and absolute terms since 2010⁴⁸³.

In turn this delay is likely to have had a negative effect on the attainment of the specific objectives related to the CCS GF in the period from 2014 to 2015. Nevertheless, in 2016, the implementation of the CCS Guarantee Facility has been very effective as three delegations agreements were signed with financial intermediaries in 2016 and calls were launched to welcome applications from CCS SMEs. At the end of the first semester 2017, all budgetary allocations were committed for the year⁴⁸⁴.

Access to finance of SMEs in the sector is facilitated by the CCS GF

The budget allocated to Creative Europe from 2016 to 2020 represents €121 million in loans guarantees targeting financial intermediaries. In turn, the amount of loans available to SMEs in the creative and culture sectors through financial intermediaries is estimated to €692 million, as €1 in loan guarantees is estimated to allow the lending of a minimum of €5.7 worth of loans⁴⁸⁵. The financing gap in the creative and culture sectors

⁴⁷⁹ With the extent the CCS GF will service the non-for-profit organisations unclear, it is currently impossible to assert to what extent the Cross-sectoral Strand of the programme will be able to improve the situation. Expectations are certainly high. Based on the results of the OPC 69% of the respondents that represented organisations active in the Culture sector anticipated that the CCS GF will have a very large of large effect on strengthening the financial capacity of operators in the CCS.

⁴⁸⁰ Mentioned by 15 representative organisations.

⁴⁸¹ To date €121 million have been committed by the EC to the CCS GF, including €14.8 million in 2016. The work on setting up the CCS GF has resulted in signing a Delegation Agreement with the European Investment Fund (EIF) that will implement the CCS GF, and three guarantee agreements with financial intermediaries in France, Spain and Romania. Two more guarantee agreements are in the pipeline. Spain is the only country where the provision of financial services to CCS has already started, according to DG CNECT. The capacity building services will be only offered to the financial intermediaries with which delegation agreements have been signed, based on their own needs assessment. Providing sufficient interest, call for capacity building services will be organised in spring 2017, with the capacity building activities to start in autumn of this year.

⁴⁸² Interviews with the Commission and EACEA officials suggest that the delay with launching the CCS Guarantee facility was due to the novelty of this instrument and the lack of funds, due to the European Commission's Investment Plan for Europe (EC IPE) launch in 2014. This resulted in budget for the CCS Guarantee facility being back loaded.

⁴⁸³ EUROSTAT General government expenditure by function (COFOG) for GF08 "Recreation, culture and religion"

⁴⁸⁴ The demand for guarantees from the CCS GF could not be satisfied by the current budget allocations. In May 2017, there was an expectation that the European Fund for Strategic Investments (EFSI) could help to meet the demand that cannot be satisfied with the current budget. Failing this, new financial intermediaries would have to wait for the start of the financial year in 2018 to apply to the CCS GF.

⁴⁸⁵ The EIB estimates the leverage effect of the loan guarantees to 5.7 at the minimum.

have been estimated to more than €1 billion a year⁴⁸⁶. Hence, the CCS GF is expected to cover 15% to 20% of the estimated financing gap of the sector⁴⁸⁷. Over the 2016 to 2020 period the CCS GF is expected to reach several thousands of SMEs⁴⁸⁸. In 2016, the €20.4 budget made available was fully committed and the three guarantee agreements signed in 2016 were expected to lead to an estimated of €140 million to €180 million worth of loans (or a 7 fold leverage effect at a minimum).

In terms of geographical coverage, the CCS GF covered financial intermediaries in three countries (ES, FR, and RO) and a financial guarantee involving a financial intermediary from a fourth country was under approval in the first semester 2017. Leads from financial intermediaries located in an additional 10 other Member States were recorded by the EIF.

Capacity building measures to support financial intermediaries in working with CCS and their projects have not yet started.

Capacity building activities planned for the CCS GF involves the provision of expertise on financing to SMEs in the CCS to the financial intermediaries participating in the CCS GF. It should improve the capacity of participating financial intermediaries to assess the risks associated with SMEs and micro, small and medium-sized organisations in the Cultural and Creative Sectors and with their projects, including through technical assistance, knowledge-building and networking measures⁴⁸⁹. In June 2017, the Commission was trying to assess the interest of financial intermediaries that signed guarantee agreements to benefit from capacity building measures⁴⁹⁰⁴⁹¹. A company in charge of implementing capacity building projects was expected to be selected through a competitive procurement procedure over the summer 2017.

In addition to the capacity building activities, the CCF GF is also expected to develop the range of financial intermediaries servicing the creative and culture sector by developing their portfolio of projects, network of potential clients as well as experience of servicing such sectors.

3.3.7 The Digital Single Market Strategy (DSMS) and Agenda for Culture should be better recognised as transversal to Creative Europe, to maximise its contribution to these strategies⁴⁹²

Both MEDIA and Culture currently make significant contributions to the aims of both the DSMS and the European Agenda for Culture (see sections 3.7.7.1 and 3.7.7.2 thereafter). Because of the separation between the sub-programmes, and the two DGs managing the programmes, the contribution to each strategy may not be effectively

⁴⁸⁶ See Press release from June 2016 from the European Commission "Creative Europe's guarantee facility for the cultural and creative sectors" http://europa.eu/rapid/press-release_MEMO-16-2346_en.htm

⁴⁸⁷ The percentage correspond to a leverage effect of 5 to 8 fold the initial loan guarantees.

⁴⁸⁸ 61% the respondents to the Media Survey and 51% of Culture Survey considered that the new CCS Guarantee Facility has the potential to add significant value for the sector.

⁴⁸⁹ An interviewee stated that "The capacity building for financial intermediaries includes support on risk assessment strategies, market share, market dynamics, and legal regime linked to intellectual property regime". Another interviewee stated that "the capacity building activities are expected to enhance financial intermediaries' understanding of how SMEs and the sector operate, and how to assess the risk and inherent value of intangible assets.

⁴⁹⁰ Financial intermediaries are requested to express interest for such measures depending on their capacity to evaluate credit risk, their knowledge of the sector and or country specific circumstances. Evaluating credit risk in the CCS requires specific and different approaches and cannot be done in a standardised way due to national market specificities, circumstances or factors limiting the financing of SMEs.

⁴⁹¹ The call for proposal for selecting a company to lead on capacity building activities was launched in May 2017. The results of the call or proposal were expected over the summer 2017.

⁴⁹² Addressing evaluation questions 28 and 29: 'To what extent have MEDIA Sub-programme and predecessor Programmes contributed to the achievement of the objectives of the Digital Single Market Strategy and a Digital Agenda for Europe?' and 'To what extent have Culture Sub-programme and the predecessor Culture Programme contributed to the achievement of the objectives of the European Agenda for Culture?'

integrated. At present, MEDIA is managed by DG CNECT and guided by the DSMS, but also makes a significant contribution to the Agenda for Culture. Culture is managed by DG EAC and guided by the Agenda for Culture, but is also profoundly affected by and contributes to the DSMS. There may therefore be an opportunity to maximise the contribution each programme makes to these strategies.

The policy areas covered by the strategies are closely intertwined. For example, the EC Communication on a European Agenda for Culture (2007) and subsequent EC Report on the Agenda's implementation (2010) mention MEDIA's contribution to intercultural dialogue and cooperation⁴⁹³ and aim to promote cultural heritage through 'fostering the process of digitisation [to] improve public access'. The DSMS includes the aim of preserving cultural heritage, and refers to libraries, museums and archives becoming more accessible through digital technologies. The adoption of the EU's copyright framework to the digital era under the DSMS⁴⁹⁴ specifically supports increased cross-border access to online content and usage of copyright materials in education, research and cultural heritage. Relating to all digital IP, this 'online content' includes cultural products, and will enable cultural organisations to widely share digitised products.⁴⁹⁵

The impacts of both programmes also clearly address both strategies. For example, MEDIA supports intercultural dialogue by increasing sector players' capacity to operate transnationally (a key Agenda objective), and the Culture Sub-programme supports the creation of online goods and attracts online audiences (a key DSMS objective). Both contribute to the development of audiences for online products, which is relevant to both strategies' objectives.

Although there are clear links between the objectives of the Strategies' synergies in the programmes' impacts, the two strategies are addressed separately internally within the Commission. Creative Europe's current lack of integration hinders the full recognition of the Programme's contribution to both strategies, as large parts of the Programme are not considered in terms of its impact. Improved recognition of the contribution made and, linked to this, a greater alignment between the DGs, would help to ensure that both Sub-programmes can better adapt to the fast-changing context in which both Sub-programmes are operating, and enhance their contribution to these strategies. Overall, this would contribute to increasing the Programme's importance to the EU.

3.3.7.1 The Culture Sub-programme contributes to all objectives of the Agenda for Culture, although MEDIA's relevance to the Agenda requires further recognition

The Agenda for Culture is supported by three key objectives: the promotion (i) of cultural diversity and intercultural dialogue; (ii) of culture as catalyst for creativity; and (iii) of culture in the EUs international relations. Across both programme periods, c while two schemes also support the third objective.

The Agenda's first objective, promotion of cultural diversity and intercultural dialogue, is to be achieved through encouraging and promoting cross-border mobility, the promotion of mobility and digitisation in the field of cultural heritage, and intercultural dialogue. These elements are effectively supported by all schemes under Culture 2007 and Creative Europe. For example (as set out in Section 3.3), the schemes contribute to encouraging cross-border mobility by increasing beneficiaries' capacity to operate

⁴⁹³ Note that MEDIA is however not mentioned in the 2015-2018 Action Plan for the Implementation of the Agenda.

⁴⁹⁴ Proposal for a Directive of the European Parliament and of the Council on copyright in the Digital Single Market, September 2016

⁴⁹⁵ E.g. digital collections as well as e-books, theatre plays, music etc.

internationally and advancing international networking among organisations⁴⁹⁶; support mobility in the cultural heritage field by encouraging transnational cooperation among heritage organisations⁴⁹⁷; and promote intercultural dialogue through increasing the cultural diversity of available literature.⁴⁹⁸

The second objective, the promotion of culture as catalyst for creativity, is to be achieved through promoting synergies between culture and education, capacity building and skills training, and fostering a favourable environment for the sector's development. This objective is clearly supported through the Culture Sub-programme schemes' support to skills training and capacity building. For example, many Network and Cooperation Project beneficiaries reported being effective in the 'development of skills, competencies and know-how'⁴⁹⁹, and there is evidence of various schemes' actions supporting capacity building through enabling long-term transnational activities, building professional capacity and providing impacts that extend beyond the project⁵⁰⁰. Projects were also more generally felt to support innovation, creativity and artistic excellence⁵⁰¹.

The third objective, the promotion of culture in the EU's international relations, is to be achieved through enhancing the role of culture in the EU's external relations, promoting diversity of cultural expression, and fostering cooperation with third countries. While this objective is less comprehensively addressed by the schemes, it is supported by the Networks and Cooperation Projects⁵⁰², which enable cooperation between EU and third-country cultural organisations and in a few cases, contribute to activities in the field of cultural diplomacy.

- In addition to the contributions made by the Culture Sub-Programme, the MEDIA Sub-programme also makes a significant contribution to the Agenda for Culture, particularly the first two objectives. Contributing to the Agenda's first objective, MEDIA promotes cultural diversity and intercultural dialogue by improving beneficiaries' capacity to engage in transnational cooperation, as well as by supporting the transnational circulation (and thus accessibility) of AV works. This impact is felt strongly by beneficiaries across all main MEDIA schemes.⁵⁰³ In

⁴⁹⁶ **Cooperation Projects:** Culture Survey - Culture Programme - 87 per cent of beneficiaries aimed to do so, 90 per cent reported effectively doing so. Creative Europe - 74 per cent reported doing so. Beneficiaries mentioned the benefits of intercultural dialogue between professionals. **Platforms:** Culture Survey - 100 per cent reported effectiveness towards achieving 'international networking among CC organisations'. **Networks:** Mapping of final reports - Networks significantly exceeded their target in implementing activities focusing on mobility experiences (1,841 target, 3,462 achieved); around 80 per cent of Culture survey respondents reported effectiveness in achieving transnational mobility of CC operators/players in both programme periods.

⁴⁹⁷ Application data. **Cooperation Projects:** cultural heritage linked to 17 per cent (Culture Programme) and 19 per cent (Creative Europe) of projects. **Networks:** cultural heritage linked to 13 per cent (Culture Programme) and 26 per cent (Creative Europe) of projects. **Platforms:** cultural heritage linked to 4 per cent of projects

⁴⁹⁸ **Literary Translations** contributed to 1,394 literary works being translated into other EU languages

⁴⁹⁹ Culture Survey: Culture Programme - 95 per cent of **Network** and almost 90 per cent of **Cooperation Project** beneficiaries effectively did so. Creative Europe - 95 per cent of **Networks** and 78 per cent of **Cooperation Projects** effectively did so.

⁵⁰⁰ E.g. many **Cooperation Project** beneficiaries spoke of the benefits of operating transnationally (leading to international exposure and knowledge-exchange). **Networks** mentioned impacting on organisations they worked with beyond the network membership, and the benefits of long-term partnerships. **Literary Translation** supported companies' long-term capabilities in realising future translations; beneficiaries reported international partnerships as important to the company's stability.

⁵⁰¹ **Cooperation Projects:** Mentioned by three sector stakeholders as well as beneficiaries, particularly for smaller-scale projects. **Platforms:** beneficiaries and stakeholders spoke of funding providing room for innovation

⁵⁰² Application data: **Cooperation Project** - Culture Programme: 260 applicants/ partners from non-EU countries (6 per cent); Creative Europe: 70 applicants/ partners from non-EU countries (5%). **Networks** (in 2014) - 20.5% partners from non-EU countries. Culture survey open responses: Under Creative Europe, around 80 projects included cooperation with third countries and 5 a focus on cultural diplomacy.

⁵⁰³ **TV Programming:** MEDIA survey respondents and interviewees reported increased ability to work on international co-productions. **Development Funding:** based on MEDIA Survey - 90 per cent of Single Project beneficiaries reported improving their capacity to cooperate nationally or internationally; 74 per cent of Single Project and 86 per cent of Slate Funding beneficiaries positively responded regarding the grant's impact on transnational circulation; 58 per cent of Single Project and 66 per cent of Slate Funding beneficiaries responded positively re increased accessibility. **Distribution:** MEDIA survey - Cinema

support of the second objective, MEDIA promotes capacity building and skills training in the sector, and helps foster a favourable environment for the development of the CCS, e.g. through growing beneficiaries' ability to take on increasingly ambitious projects as well as their capacity to produce AV works with high European dimension. Again, beneficiaries confirmed a strong impact in this area.⁵⁰⁴

- As DG EAC is however not involved in the management and review of MEDIA, these contributions made by the MEDIA Sub-programme to the Agenda for Culture are not at present fully taken into account in assessing Creative Europe's effective contribution to the Agenda's objectives.⁵⁰⁵ This means that at present a valuable aspect of Creative Europe's contributions to the Agenda is missed; and likewise, that the opportunity for DG EAC to review and enhance the Programme's alignment with the Agenda is limited by its focus on the Culture Sub-programme.

3.3.7.2 DSMS is increasingly supported by MEDIA, although strategic consideration of 'traditional AV activities' and recognition of the wider CCS' impact on the DSMS is lacking

The Digital Agenda for Europe, issued in 2010, supports the deployment of European digital service infrastructures and the development of a digital single market. It includes 16 key actions for the Commission and Member States, to be tackled by legal initiatives or proposals. This is supported by the DSMS, adopted in 2015, which is designed to bring the EC's single market principles to the digital realm with a focus on three pillars: (i) 'improving access to digital goods and service across the EU'; (ii) 'creating an environment where digital networks and services can prosper'; and (iii) 'supporting the use of digital as a driver for growth'. While some elements of all actions supported by the MEDIA Sub-programme across both programme periods contributed to these pillars, MEDIA is increasingly contributing to the Strategy as actions under the Sub-programme with a digital focus are expanding in scope and scale.

- As MEDIA 2007 started several years prior to the introduction of the Digital Agenda and ended before the introduction of the DSMS in 2015, it cannot be considered as instrumental in implementing the Agenda and Strategy, but can be reviewed retrospectively in terms of how it corresponded to the documents' actions and priorities. This suggests that MEDIA 2007 contributed to the DSMS' pillars in several ways. Indicatively, funding data shows that around 7 per cent of total funds went to activities with an online component⁵⁰⁶, and the VOD scheme received 27 per cent of Distribution's total spend. By providing support to the promotion, marketing and development of 43 VOD platforms, the programme contributed to improving access to digital goods (first pillar), and to helping the industry take advantage of digitisation and digital services to prosper (second and third pillars). Support to cinema digitisation distributed among 257 beneficiaries similarly contributed to the first and third pillars of the DSMS. As such, these activities particularly correspond to the Digital Agenda's objective of 'promoting cultural diversity and creative content'.⁵⁰⁷

Selective and Automatic beneficiaries most commonly reported increasing the circulation/ distribution of European audiovisual works within Europe and/or beyond as effective (93 per cent for both)

⁵⁰⁴ **TV Programming:** of 111 companies, 64 per cent who were awarded re-applied for larger projects. **Development:** Increased capacity to invest in the development of European AV works was reported as strongest impact among survey respondents (74 per cent of Single Project and 79 per cent of Slate Funding beneficiaries)

⁵⁰⁵ e.g. the Progress report on the Agenda for Culture's implementation (2010) briefly mentions the MEDIA programme's support to media literacy and cross-border activity in the AV field as relevant; however the Interim Evaluation of MEDIA 2007 (Eureval/ Media Consulting Group, 2010) does not refer to the Agenda for Culture; and MEDIA was not included in the evaluation question for this report to assess Creative Europe's impact on the Agenda.

⁵⁰⁶ This includes support to the digitisation of cinemas and VOD.

⁵⁰⁷ Presented under the action area 'ICT-enabled benefits for EU society'

- Under Creative Europe, the scope of MEDIA's digital focus has widened through the introduction of the Online Distribution scheme⁵⁰⁸, which includes support to European VOD services as well as to digital packages of European AV work and to the innovative distribution and promotion of European AV work. The Online Distribution scheme has made up around 6 per cent of total funds under the Sub-programme and 28 per cent of Distribution's total spend so far, and through its supported actions, has achieved a range of impacts that contribute to the DSMS's pillars. It has effectively supported the circulation and distribution of European works within Europe and/or beyond, as well as – to a lesser extent – the development of new audiences and increased viewership of VOD catalogues⁵⁰⁹ (first pillar). It has also supported the development of new distribution methods and business models, as well as beneficiaries' capacity to engage in transnational cooperation⁵¹⁰ (second and third pillar).
- In addition, some of the MEDIA schemes covering more 'traditional' AV activities – such as Training, Cinema Automatic and film development – also have a significant digital component. These contributed to the DSMS in particular through providing ICT/digital capacity building, and through supporting the online visibility of projects (second and third pillar).⁵¹¹

The DSMS' new copyright framework includes measures to widen access to online content across the EU⁵¹², partly funded by MEDIA. In line with this, and to relate Online Distribution further to the DSMS, in 2017 the scheme has been adapted to cover two key objectives: (i) supporting innovation and new distribution/ promotion models to seize the opportunities of online technology; and (ii) increasing European films in catalogues.⁵¹³ Support will increase from €5.6 million (2016) to around €9.5 million (2017). These changes are likely to make the MEDIA Sub-programme increasingly efficient in its contribution to the DSMS's objectives⁵¹⁴. There is some concern in the wider AV sector that the increasing alignment of MEDIA with the DSMS – and a corresponding increase in the proportion of funding for 'online' actions – will result in a decrease in funds for traditional mechanisms for production and exhibition, and that while a clear strategy exists for the expansion of digital activity, there is a lack of strategic consideration about the implications of digital expansion on traditional AV activities. This is particularly pertinent given the contributions to the ambitions of the DSMS made by these more traditional mechanisms supported under MEDIA (as outlined in the previous paragraph), which are likely to further increase as the role of digital within 'traditional' AV sectors becomes increasingly dominant.⁵¹⁵

⁵⁰⁸ Successor of the Support to VOD scheme under the predecessor programme

⁵⁰⁹ Reported by 11 of 13 and 7 of 13 beneficiaries respectively. 11 reported that the funding had an impact on the viewership of their VOD catalogue (Creative Europe)

⁵¹⁰ Reported by 12 of 13 beneficiaries. 100 per cent of MEDIA survey Online Distribution beneficiaries agreed with the statement that the funding improved their capacity to engage in transnational cooperation

⁵¹¹ Under Creative Europe, the **Training Scheme** promotes the acquisition of skills, including the use of digital technologies. 4 per cent of training actions mostly focused on ICT/digital; 27 per cent of training actions covered 'digital and multimedia'; 45 per cent of participants found this training to be effective (IDEA & CSES, 2016, *Contribution of the Creative Europe Programme to fostering Creativity and Skills Development in the AV sector*). Recent rule changes to **Cinema Automatic** allow inclusion of the preparation for online releases, thus supporting the online release of films that the market has supported theatrically, and encouraging traditional distributors to work more effectively with online markets. **Development Funding** contributed to projects' enhanced online visibility (16 successful compared to 9 unsuccessful projects under MEDIA 2007 found online; and 10 vs 7 under Creative Europe), although supported projects under the current programmes received very few votes on IMDB.

⁵¹² Annex, 2018 Annual Work Programme of 'Creative Europe' Programme

⁵¹³ European Commission (2016). *2017 annual work programme for the implementation of the Creative Europe Programme*

⁵¹⁴ However, the clear focus on films in the revamped 'Promotion of European works online' suggests that there will continue to be a focus on supporting the development and distribution of AV works for theatrical release.

⁵¹⁵ e.g. although cinema exhibition is sometimes considered 'traditional', around 90 per cent of European cinema screens are now digital

- In addition to the contributions made across MEDIA to the strategy, the Culture Sub-programme also contributes to the objectives of the DSMS. This includes the creation of new online goods and attracting online audiences⁵¹⁶ as well as enabling the use of digital technology to promote cultural works⁵¹⁷ (first pillar); increasing the level of digital activity of cultural networks and organisations⁵¹⁸ (second pillar); and supporting relevant capacity building and use of digital promotion approaches (third pillar).⁵¹⁹

As with MEDIA's contribution towards the Agenda for Culture, there is an opportunity to better recognise these contributions of the Culture Programme to the DSMS' pillars. Again, at present they are not fully considered in assessing Creative Europe's contribution to the DSMS⁵²⁰, and likewise the overall Programme's alignment to the ambitions of the DSMS is limited by DG CNECT's focus on the MEDIA Sub-programme. This is particularly pertinent given that the new copyright agenda includes cultural heritage as a key focus and includes all 'online goods' in its remit, suggesting that the culture sector will become increasingly relevant to the objectives of the DSMS.

3.3.8 The MEDIA and Culture predecessor programmes were effective overall in delivering their key outputs, results and impacts, while the MEDIA Mundus impact was fragmented

This sub-section assesses the extent to which the predecessor MEDIA 2007, MEDIA Mundus and Culture programmes delivered their planned outputs, intended outcomes and results as well as produced the anticipated impacts. In line with the original evaluation question⁵²¹ the evaluation focused on the assessment of the predecessor programmes' outputs, results and impacts on the level of individual schemes. A detailed analysis on the predecessor MEDIA and Culture programmes' outputs, results and impacts is presented in Annex 2. This section offers a summary of these key outputs, results and impacts on the programme level, offering a baseline for comparison with the current Programme, and highlighting the key achievements of the predecessor programmes.

3.3.8.1 Predecessor MEDIA Programme delivered most of its expected outputs, outcomes and impacts, but less so in smaller, low PCCs

The predecessor MEDIA Programme level inputs are presented in Section 1.4.2. Of the total €769 million MEDIA 2007 budget, 53% were allocated to the five high PCCs, 27% to medium and 10% to low PCCs. Similar share (10%) of the total predecessor MEDIA budget was spent on the support for Europa Cinemas.

⁵¹⁶ Three **Platforms** reached 26,300 online audiences through websites/digital platforms in total, plus 72,000 through Facebook. **Cooperation Projects** reported benefits of using web-based portals to reach audiences.

⁵¹⁷ **Platforms**: around 42 per cent of MEDIA survey respondents reported this, the highest impact reported alongside 'increased no/scale of activities undertaken'. **Literary Translations**: the mapped final reports and interviews suggests that most publishers rely on their social media channels to promote the translated books and to advertise their promotional events

⁵¹⁸ **Networks**: Based on a project mapping, this increased from no projects which mentioned 'social media or digital platforms' under Culture Programme to five of 35 under Creative Europe (the largest number, 10, mentioned workshops/roundtables). **Cooperation Projects**: some beneficiaries reported e.g. the creation of web-based information tools or the new use of new digital techniques through the programme.

⁵¹⁹ **Cooperation Projects**: Beneficiaries increasingly identified 'development of skills, competences and management models' (including 'for the use of new technologies') as objective, and effectively did so⁵¹⁹; **Literary Translations** support promotional activities of translated including through the use of digital technologies.

⁵²⁰ E.g. while the interim evaluation of Culture 2007 referred to the 'clear role' of culture in flagship initiatives of the then new Europe 2020 Strategy such as the Digital Agenda (Ecorys, 2010, p.iii), again e.g. the evaluation question in this report on the effectiveness of Creative Europe to the DSMS focused on MEDIA only.

⁵²¹ This and the next section address the evaluation question 'To what extent are the various programme schemes and actions under Creative Europe and its predecessor programmes are delivering or have delivered the expected outputs, results and impacts?'

Detailed in Annex 2 and summarised in Table 14 below, the evidence collected shows that the predecessor MEDIA programme delivered most of its expected outputs, results and impacts.

In terms of outputs, the predecessor Programme supported a total of around 10,898 projects, corresponding to an average of 1,550 projects per year. It provided support for the development of more than 3,100 European films and 460 TV productions as well as distribution of 2,200 unique European titles.

In terms of results, the MEDIA 2007 led to the training of around 1.1% of all European audiovisual professionals. Its development support contributed to the production of 450 quality films per year or 18% of all the annual European films produced. The predecessor MEDIA distribution schemes contributed to the generation of a total of 492 million admissions recoded for the supported films.

In terms of impacts, the development support under predecessor MEDIA helped the sector to maintain the scale of its operations, increasing the feasibility of projects and helped to leverage financial support. The development schemes also helped the benefiting companies to develop the scale of their operations. The distribution schemes had a positive impact on increasing investment in distribution and promotion of European audiovisual works.

The key evidence on the outputs, results and impacts of the predecessor MEDIA schemes in Table 14 has been further used to benchmark the performance of the current MEDIA Sub-programme schemes (as presented in Section 3.3.9.1).

Table 14. Predecessor MEDIA – key outputs, results and impacts

Stages	Key evidence
Outputs	<p>Training</p> <p>327 Continuous Training projects and 88 Initial Training projects</p> <p>Development</p> <p>Development schemes Single Projects and Slate Funding supported a total of 3,160 films (Single 1,350 films and Slate 1,810 films, 3.7 per slate)</p> <p>Development schemes supported the makings of 450 films per year on average, or 28% of annual European film output⁵²²</p> <p>TV Broadcasting</p> <p>A total of 461 TV production projects supported, on average 66 projects per year</p> <p>Most, 67% of all projects supported were from high PCCs, 25% from medium PCCs and 8% from low PCCs</p> <p>Distribution</p> <p>9,746 projects (4,968 Distribution Automatic, 4,209 Cinema Selective, 194 Sales Agent, 275 Cinema Digitalisation, 100 Online distribution and the Cinema Network 'Europa Cinemas')</p> <p>Promotion</p> <p>Around 330 market access projects (or around 50 per year), around 640 film festivals' projects (around 90 annually) and 32 MEDIA stands</p>

⁵²² According to the EAO data 1,626 films were produced per year on average in the period 2010-2013, Countries eligible to MEDIA (for Iceland, data only available for 2010 and 2011).

Stages	Key evidence
Results	<p>Training</p> <p>8,800 professionals trained</p> <p>Development</p> <p>Supported around 1,844 unique companies, 1,037 (56%) in high PCCs, 508 (27%) in medium and 299 (17%) in low PCCs</p> <p>Estimated 1,460 audiovisual works supported by Single Projects and Slate Funding schemes went into production; around 850 made it to the market</p> <p>TV Broadcasting</p> <p>Production of 461 unique titles of European TV productions supported</p> <p>Supported around 300 unique companies, 190 (63%) in high PCCs, 86 (29%) in medium and 31 (10%) in low PCCs</p> <p>Distribution</p> <p>Distribution Automatic, Cinema Selective and Sales Agent projects supported the distribution of a total of 2,280 unique European titles;</p> <p>Distribution schemes supported a total of 1,075 theatrical and 33 non-theatrical distributors: Distribution Automatic (330), Cinema Selective (519) and Sales Agent (38) schemes as well as Digitalisation of cinemas (187) and Online distribution (33)</p> <p>Promotion</p> <p>Access to Markets scheme supported 116 unique market access events⁵²³, around 200 unique festivals and four MEDIA stands in major market fairs per year</p>
Impacts	<p>Training</p> <p>1.1% of all European AV professionals trained⁵²⁴</p> <p>Development⁵²⁵</p> <p>The number of partners (at the end of the development stage): around 4,000, including around 600 international (2440, including 370 international for Single Projects and 1570, including 220 international for Slate Funding)</p> <p>The audiovisual works supported were of overall good quality: films supported by Single Projects had an average IMDB rating of 6.5; those supported by Slate Funding projects – 6.4 points⁵²⁶</p> <p>Development Single Projects schemes helped companies to maintain the scale of their operations, increased feasibility of projects and helped to secure follow up funding</p>

⁵²³ 45% of the Access to Markets events were supported only once, 31% 2-4 times and further 24% 5-7 times.

⁵²⁴ 8,800 unique professionals trained divided by all employed in the audiovisual sector in 2010 (middle of the predecessor Programme period).

⁵²⁵ The agreed samples of projects included in the FE on MEDIA Distribution were too small to accurately estimate the number of admissions for supported films, based on the EAO data. EAO admissions data was available on four out of seven Single Projects that reported 138,175 admissions in total or 34,544 admissions per film supported by predecessor MEDIA. The samples are too small to extrapolate with any degree of reliability. For Slate Funding projects no titles are recorded in the Programme data as the projects support slates of films. This is why it was not possible to check the admissions for the audiovisual works supported by this predecessor scheme.

⁵²⁶ IMDB average score for is 6.38.

Stages	Key evidence
	<p>The Slate Funding scheme support contributed to the longer-term financial stability and strategic planning capacity of the supported companies, helping them to leverage financial support for the projects</p> <p>The support of the Slate Funding scheme was perceived to have a greater effect than that of Single Projects on feasibility and increased circulation of supported audiovisual works as well as companies' capacity to invest in the further development of European audiovisual works</p> <p>The Single Projects scheme was perceived to be more effective in improving access of audiences to European audiovisual works (i.e. diversity of offer) and on allowing supporting companies to participate in the development of European AV works on 'more equal terms' with operators from higher PCCs (i.e. levelling playing field)</p> <p>TV Broadcasting</p> <p>Scheme's support extended the pool of partners and enabled better quality of the final product</p> <p>Average IMDb rating of supported coproductions – 7.15 out of 10, 7.2 for animation, 7.3 for documentary and 6.9 for fiction genre⁵²⁷</p> <p>Distribution</p> <p>Cinema Automatic – total 387.8 million non-national admissions (2007-2013)⁵²⁸, distributed in 14.3 territories on average (including national territory)⁵²⁹</p> <p>Cinema Selective – estimated total 104.1 million non-national admissions⁵³⁰, 19.9 territories on average (including national territory)⁵³¹</p> <p>Average IMDb rating of 6.7 for Cinema Automatic and 6.9 for Cinema Selective on IMDb.</p> <p>Average nomination and awards per film 12.3 and 7.8 respectively for Cinema Automatic, 14.5 and 11.3 respectively for Cinema Selective.</p> <p>MEDA Distribution schemes achieved most of their key expected impacts in terms of increasing investment in the promotion and distribution of European AV works</p> <p>Cinema Automatic and Cinema Selective were effective in increasing investment in the promotion and distribution of European AV works, but less to in increasing the number of employed in the sector</p> <p>The main reported impact of the Online Distribution support was on the increased scale of their activities</p> <p>Promotion</p>

⁵²⁷ Because of the limited number of projects included in the FE sample, the mapping was undertaken across the predecessor and current programmes (period 2012-2014) to improve the reliability of results.

⁵²⁸ Admissions as reported from the EACEA to the EAO, period 2007-2013. To allow comparison the calculation only includes admissions for which the nationality of film is indicated (there were a number in admissions in the EACEA data provided without an indication of the country of film origin).

⁵²⁹ Based on the EAO Lumiere Database from a sample of films from each year.

⁵³⁰ Estimated based on EAO Lumiere data.

⁵³¹ Estimated based on EAO Lumiere data.

Stages	Key evidence
	MEDIA support increased the visibility of their European audiovisual works, the diversity of their audiovisual works' offer and indirectly increased audiences for the European audiovisual works

Source: ICF and BOP analysis (sources: Programme data, MEDIA FEs, MEDIA survey)

3.3.8.2 MEDIA Mundus

With a total budget of €13.8 million, MEDIA Mundus supported around 60 audiovisual operators through a total of 67 projects implemented during the period 2011-2013. As presented in Section 1.4.3, the Programme supported a range of measures that included training, access to markets and 'cross-over activities'⁵³² aimed at promoting the circulation of European films in third countries and vice versa. Some of the challenges in the implementation of MEDIA Mundus have been already highlighted in sub-section 3.3.4.3.

The lion's share of MEDIA Mundus support was allocated to French companies (29% of the projects and 44% of all funding awarded in the period), followed by German (13% of projects and funding) and Italian audiovisual operators (10% of projects and 6% of funds). The remaining 41% of the funding was shared among 10 other countries and included 7% spent on five international networks.

The evidence collected suggests that MEDIA Mundus delivered most of its planned outputs and results, but its impact was fragmented. The MEDIA survey results suggest⁵³³ that a large majority of projects delivered their planned outputs and results: 75% of the respondents reported that their project delivered 'all' project outputs and results and a further 25% 'most' projects' outputs and outcomes planned. However, the interviews undertaken suggest a shortage of applications and innovative projects under Mundus, as most applicants were already supported by the predecessor MEDIA Programme. It was also reported that some projects' coordinators faced insurmountable challenges in ensuring that their partners in other countries comply with the administration requirements⁵³⁴.

The evidence collected⁵³⁵ further suggests that the impact of MEDIA Mundus was stronger in relation to the development of market knowledge among professionals from European and third countries and increasing the circulation and sales of European works abroad⁵³⁶ (rather than on the circulation of works of third countries in Europe). The Programme helped to secure funding from other sources outside Europe⁵³⁷. Over time, it created a growing network of EU and third countries professionals who participated in the Programme.

⁵³² cross-cutting projects covering at least two of the specific objectives of the Programme e.g. trainings with subsequent pitching events at co- production meetings, etc. (MEDIA Mundus – Call for Proposals 2013)

⁵³³ Five full responses to the MEDIA survey were received from beneficiaries of MEDIA Mundus, representing 8% of all the beneficiaries supported under this Programme

⁵³⁴ Two interviews with programme managers

⁵³⁵ MEDIA survey results, two interviews with programme managers and one with a key beneficiary of MEDIA Mundus (i.e. a supported international network).

⁵³⁶ According to an interview with a network supported by MEDIA Mundus, the discontinuation of MEDIA Mundus support negatively influenced the distribution and screening of small European films in third countries

⁵³⁷ Interview with a network that benefited from the Programme support and MEDIA survey results.

3.3.8.3 Predecessor Culture Programme was overall highly successful in delivering its expected outputs and outcomes

As illustrated by the key findings summarised in Table 15 and the supporting analysis in Annex 2 the predecessor Culture programme was overall highly successful in delivering its expected outputs and outcomes.

The key inputs of the predecessor Culture Programme are presented in Section 1.4.4. In terms of outputs the predecessor Culture Programme supported a total number of 2,138 projects or 305 projects per year on average, including 780 Cooperation projects, between 27 and 42 networks and 640 Literary translation projects.

In terms of results, the supported projects brought together cultural and creative operators from 39 countries. A rough estimate suggests that around 260 thousand cultural and creative players were engaged in / by supported projects⁵³⁸, amounting to 2.3% of all employed in the sectors in 2010. According to the Culture survey, 98% of predecessor Programme's projects delivered all or most of their planned outputs and results⁵³⁹. The Cooperation projects delivered an estimated 4,200 activities, 89% of which focused on common creation of artworks. Literary translation projects delivered more than 3,100 translations.

In terms of impacts, the cooperation projects reached an estimated 8.83 million people. The strongest reported impacts of all the key predecessor Culture scheme was on increasing the scale and diversity of the participating cultural and creative operators' activities. The supported networks/cultural bodies had a weaker than anticipated impact on increasing the use of digital technologies for the development, distribution and promotion of cultural and creative works. The predecessor translation scheme contributed to 2.9 million books sold.

The key outputs, results and impacts, where possible aggregated across predecessor MEDIA schemes, are summarised in Table 15. These key findings also provide a baseline for the assessment of the performance of the current Culture Sub-programme, presented in Section 3.3.9.2.

Table 15. Predecessor Culture – key outputs, results and impacts

Stages	Key evidence
Outputs	<p>Cooperation projects</p> <p>Total of 786 projects: 695 Cooperation Measures, 80 Multi-Annual Cooperation Projects and 11 Cooperation Projects between organisations involved in cultural policy analysis</p> <p>Cultural bodies</p> <p>207 annual grants signed with between 27 and 42 networks were funded in the period</p> <p>Literary translation</p> <p>641 Literary translation projects supported</p>

⁵³⁸ There is currently no monitoring data collected on this indicator across the key culture schemes. This calculation was made assuming each cooperation project had 273 partners and each translation project involved at least one translator and one editor (findings of the Culture FEs), plus one person per each 'unique' Culture Sub-programme beneficiary, and that each participant only took part in the programme only once. Eurostat data on culture sectors' employment in 2010 (Creative, arts and entertainment activities; and Libraries, archives, museums and other cultural activities combined) was used as a figure for total EU employment in the sectors.

⁵³⁹ (n=322). Majority of respondents (65%) indicated that their projects delivered all the planned outputs and further more third (34%) most of their outputs and outcomes. The remaining respondents (less than 2%) reported that their projects were still ongoing at the time of the survey, falling short in one results' areas or claimed to have over-delivered.

Stages	Key evidence
Results	<p>Cooperation projects</p> <p>Lead applicants from 32 countries (including 5 non-EU countries) and partners from 39 countries (including 11 non-EU countries)</p> <p>Estimated number of CC players involved in supported projects⁵⁴⁰ – 215,000</p> <p>A combined total of 4,230 activities, including 3,782 activities involving creation of art works and 149 other types of activities⁵⁴¹</p> <p>Majority of Cooperation Projects delivered all or most of their planned outputs/results⁵⁴²</p> <p>Cultural bodies</p> <p>Estimated number of CC players involved in supported projects – 36,000⁵⁴³</p> <p>The projects were broadly effective in delivering their expected outputs/results⁵⁴⁴</p> <p>Literary translation</p> <p>3,161 translations undertaken, estimated 3.7million translated books printed</p>
Impacts	<p>Cooperation projects</p> <p>Total audiences – estimated 8,830,000 people reached</p> <p>All three schemes have achieved most of their key expected impacts</p> <p>Considerable impact reported on an increased number/scale of activities, increased diversity of the type of activities and improved access to CC works among audiences⁵⁴⁵</p> <p>Cultural bodies</p> <p>Projects funded under this scheme were effective in achieving some but not all of their key expected impacts</p> <p>Considerable impacts of this scheme were an increased number/scale of activities undertaken, and increased diversity of the type of activities undertaken</p> <p>Less of an impact on increasing the use of digital technologies for the development of new markets for CC works and for the promotion of CC works</p> <p>Literary translation</p> <p>At least 2.9 million translated books supported by the predecessor Culture</p>

⁵⁴⁰ Based on the number of projects (Programme data) and average number of CC players engaged per project (FE on Cooperation projects)

⁵⁴¹ Extrapolation based on a number of activities per year (selected years, 30 2008 reports). The number of activities reported varied considerably between projects and type of activities. The largest number of activities reported were the creation of artworks – 3,782 activities; with ‘seminars, conferences, symposiums and debates’ the next highest at 149 activities.

⁵⁴² Culture survey, confirmed by a mapping of a sample of final reports

⁵⁴³ No data on transnational mobility. No monitoring data available for the period. Estimate based on an average number of 34 networks supported in the period and the current Programme performance.

⁵⁴⁴ Culture survey. For more detail, please see Annex 2.

⁵⁴⁵ Please see Annex 2 for more detail.

Stages	Key evidence
	Programme have been sold
	The average price for a translated book indicated in the final reports mapped was €13.32
	The average Programme investment per book sold €5.98

Source: ICF and BOP analysis (sources: Programme data, Culture FEs, Culture survey)

3.3.9 Creative Europe overall delivers its planned outputs, results and impacts, but effectiveness could be improved for some aspects of the supported schemes⁵⁴⁶

This sub-section provides an assessment of the extent to which the Creative Europe Programme, its Sub-programmes and their various schemes have delivered their planned outputs and produced their expected outcomes and anticipated impacts due to the Programme intervention.

The focus of the original evaluation question was on the assessment of the outputs, results and impacts of the various schemes of supported by the current Programme. However, this section also aggregates the key achievements of Creative Europe on the programme level, and, where possible, offers a comparison with the predecessor programmes.

The Creative Europe Programme level inputs are presented in sub-section 1.4.5. In line with the Regulation establishing the Creative Europe Programme 56% of the current programme is to be spent on MEDIA Sub-programme, 31% on Culture Sub-programme and further 13% on the measures supported under the Cross-sectoral Strand of the Programme⁵⁴⁷. The spending under Creative Europe during the first three years of its implementation shows slightly less spent on MEDIA (60%) and more on Culture side of the Programme (33%)⁵⁴⁸. It needs to be noted that based on the Eurostat data available⁵⁴⁹ on employment in audiovisual and culture sub-sectors, employment in culture sub-sectors was more than the double (2.13 times larger⁵⁵⁰) than that recorded in the audiovisual sub-sectors in the period.

During the first three years of operations, 39% of the total Programme budget have been appropriated.⁵⁵¹ The total budget of the Creative Europe Programme represents a 28% increase compared to the combined budgets of the predecessor MEDIA, MEDIA Mundus and Culture programmes⁵⁵². However, the increase is only 11% if the total budgets spent

⁵⁴⁶ This section address the evaluation question 'To what extent are the various programme schemes and actions under Creative Europe are delivering or have delivered the expected outputs, results and impacts?'

⁵⁴⁷ Regulation No 1295/2013, Article 24 'Financial provisions'.

⁵⁴⁸ There was an underspending under the Cross-sectoral Strand (7%) that can be partially explained by the late start of the CSS Guarantee Facility, but is also due to other reasons underlined in section 3.3.9.3.

⁵⁴⁹ On employment in audiovisual sub-sectors: 'Motion picture, video and television programme production, sound recording and music publishing activities' and 'Programming and broadcasting activities'. And employment in culture sub-sectors: 'Creative, arts and entertainment activities' and 'Libraries, archives, museums and other cultural activities'. The latest available employment data (years 2014-2015) was used as a proxy for the current Programme period.

⁵⁵⁰ Total employment in the above mentioned audiovisual sub-sectors in the period 2014-2015 was 1.6 million people, in the culture sub-sectors it was 3.5 million persons.

⁵⁵¹ If the investment continues on the same scale as for the first three years, and the resources committed for the CCS Guarantee are fully appropriated by 2020, the Programme is likely to have an underspending of 1.3%.

⁵⁵² The total spent under the predecessor Programmes amounts to €1.15 billion, compared to €1.46 billion foreseen for the current Programme.

of the predecessor programmes and Creative Europe are compared, the 17% additional difference is due to the budget allocated to the Cross-sectoral Strand⁵⁵³.

It also needs to be noted that only 24% of the Creative Europe projects were completed by the time of this study⁵⁵⁴. This needs to be considered when examining the extent the Programme has delivered its anticipated results, and especially in relation to impacts that can be expected at this mid-term review stage.

In terms of outputs Creative Europe has delivered or delivers a total of 6,286 projects during its first three years of implementation or on average 2,095 projects per year. This is exactly 15% more projects than yearly averages of the predecessor programmes combined, hence the performance of Creative Europe in terms of outputs is aligned with the relative increase in annual budgets.

In terms of results, both the MEDIA and Culture Sub-programme appear slightly more effective than their predecessors; although the level of effectiveness achieved varied from one scheme to another.

In terms of impacts, it is too early to assess the impact of the current MEDIA and Culture Sub-programmes. The comparative assessment of the effectiveness in generating impacts tends to favour the current MEDIA Sub-Programme when compared to its predecessor. As for the Culture Sub-programme emerging evidence of impact at scheme level tends to indicate that the current effectiveness of the Culture Sub-Programme is on broadly par with its predecessor.

The next sections present the extent MEDIA Sub-programme (Section 3.3.9.1), Culture Sub-programme (Section 3.3.9.2) and the Cross-sectoral Strand of Creative Europe (Section 3.3.9) have delivered their expected outputs, results and impacts. The evidence box below presents the positive and negative factors as unintended effects of the current Programme.

Positive factors influencing outputs, results and impacts

Increasing clarity of the Programme composition, in terms of schemes' outlines under Sub-programmes as well as their individual objectives.

Regularity of the funding calls and the predictability of the grant size awarded.

Easier and more transparent application processes due to online applications⁵⁵⁵.

Improved project management experience due to continued EACEA support to projects after the selection.

Negative factors influencing outputs, results and impacts

Low applications' success rates of MEDIA Single Projects and Culture Cooperation Projects cause dissatisfaction among the applicants.

Some schemes (e.g. MEDIA training, Sales Agents and Single Projects) are too small budget wise to produce the intended structuring impact on the sector.

⁵⁵³ The Cross-sectoral Strand was introduced with the Creative Europe Programme had no equivalent under the predecessor programmes.

⁵⁵⁴ During the MEDIA and Culture surveys' period (September-October 2016) 29% of MEDIA projects reported to be completed, while 71% was ongoing (n=400); the same was true for 20% and 80% of all Culture projects (n=438).

⁵⁵⁵ This has been recognised as a positive development by a number of interviewees, including those consulted in the framework of FEs' case studies, but also through the open ended responses provided to the MEDIA and Culture surveys. The FE6 interviewees noted that scheme guidelines are becoming clearer each year. Interviewees suggest that improved procedures for the review of applications ensure transparency and prevent fraud. They also report that comprehensive evaluation reports from the external experts are a great learning tool. The national and European beneficiaries also emphasised that receiving support from EACEA after the selection process has ended helped them to ensure a smooth implementation of their projects.

Programme is perceived by a few national organisations as more bureaucratic in terms of application and reporting burdens compared to national funding schemes⁵⁵⁶.

Inadvertent effects of the Programme⁵⁵⁷

Increasing competition under Creative Europe has helped the participants to develop skills in application writing, development of strategies for project implementation as well as long-term organisational strategies and partnerships.

The Creative Europe Programme is increasingly seen by national, regional and local officials as means to encourage development on local level through combination of European, national, regional or local funds.

3.3.9.1 The MEDIA Sub-programme is effective overall in the way training, development, distribution and promotion schemes deliver outputs, results and impact, but more could be done to reach wider audiences and balance the support across participating countries

The MEDIA Sub-programme is effective in delivering its planned outputs, outcomes and impacts. It is also slightly more effective in delivering its planned outputs and outcomes than its predecessor⁵⁵⁸. While the current Sub-programme is more geographically balanced and delivers more effectively against the audience development objective than its predecessor, more can be done to further balance the way Sub-programme budget allocation to deliver results across the different types of PPCs.

In terms of outputs, the current MEDIA Sub-programme shows a 26% increase in terms of number of projects supported, with an average annual budget that is almost the same as for the predecessor Programme⁵⁵⁹. The current MEDIA also supports the same number of titles each year (580) across various schemes as the Predecessor (571)⁵⁶⁰.

In terms of key results, the current MEDIA Sub-programme appears to be slightly more effective than its predecessor but its effectiveness varied in between schemes. For instance, the Training scheme trained 8% less participants, the Development Schemes supported 16% less unique companies and 6% less films made it to production, TV programming produced 15% less titles but supported 11% more unique companies, the distribution schemes supported 20% more European titles and 34% more non-theatrical distributors, and the promotion scheme supported 47% more market access events.

In terms of key impacts, it is too early to assess the impact of the current MEDIA Sub-programme. Evidence of impact reported for selected scheme are reported in the table below. The comparative assessment of the effectiveness in generating impacts tends to favour the current MEDIA Sub-Programme: the quality of the productions achieved by the TV Programming scheme is on par with the one achieved by its predecessor, Cinema Automatic and Cinema selective supported works achieved more national admissions, increased the average numbers of territories in which the supported works are distributed and achieved an equal level of quality of works distributed.

⁵⁵⁶ Five national level interviews (two CEDs, two national sectors representing organisations and one ministry)

⁵⁵⁷ Interviews with programme managers, key informant interviews and open ended responses to the surveys.

⁵⁵⁸ As evidenced by the sub-sections to follow and the MEDIA survey results: A total of 99% of respondents with projects under the current MEDIA had delivered all or most of their outputs and outcomes at the time of the survey, compared to 91% of respondents that indicated the same under the predecessor programme. Further, the total share of respondents who reported that their projects delivered only few or none of their planned outputs for completed projects was higher for the predecessor MEDIA programme (6%), compared to none under the current MEDIA Sub-programme.

⁵⁵⁹ The average annual spending during the first three years of MEDIA Sub-programme was €109 million, compared to 109.8 million during the predecessor Programme.

⁵⁶⁰ Programme data. Combined numbers of all the schemes that support individual audiovisual works rather than events or slates.

Table 16 offers a summary of the key outputs, outcomes and impacts of the current MEDIA Sub-programme in a comparative way its predecessor.

Table 16. Key outputs, results and impacts of the MEDIA Sub-programme

Predecessor MEDIA	Current MEDIA Sub-programme
Outputs	
<p>Training:</p> <p>415 training projects, 59 per year on average</p>	<p>Training:</p> <p>171 training initiatives⁵⁶¹, 57 per year on average</p>
<p>Development</p> <p>Development Single Projects scheme supported 193 projects on av. per year</p> <p>Development Slate Funding scheme supported 70 projects on av. per year</p> <p>Development schemes Single Projects and Slate Funding supported a total of 3,160 films (Single 1,350 films and Slate 1,810 films), 450 films per year on av.</p> <p>Development Slate projects included 3.7 films per slate</p>	<p>Development</p> <p>Development Single Projects scheme supported 150 projects on av. per year, with 20% decrease in annual support</p> <p>Development Slate Funding scheme supported 75 projects on av. per year, , with 20% increase in annual support</p> <p>Development schemes Single Projects and Slate Funding supported a total of 1,330 films (Single 450 films and Slate 880 films), 443 films per year on av.⁵⁶² with 3% total increase in av. annual support</p> <p>Number of films per slate supported by Slate Funding projects increased to 3.9</p>
<p>TV Broadcasting</p> <p>A total of 461 TV production projects supported, on average 66 projects per year</p> <p>Most, 67% of all projects supported were from high PCCs, 25% from medium PCCS and 8% from low PCCs</p>	<p>TV Programming</p> <p>A total of 165 TV production projects supported, on average 55 projects per year despite 15% budget increase⁵⁶³</p> <p>PCC distribution was more in favour of medium (and low) PPCs, 53% high , 36% medium and 11% low PCCs</p>
<p>Distribution</p> <p>9,746 projects (4,968 Distribution Automatic, 4,209 Cinema Selective, 194 Sales Agent, 275 Cinema Digitalisation, 100 Online distribution and the Cinema Network 'Europa Cinemas') or 1,392 projects on av. per year</p>	<p>Distribution</p> <p>4,277 projects (2,665 Distribution Automatic, 1,392 Cinema Selective⁵⁶⁴, 139 Sales Agent, 57 Online distribution and the Cinema Network 'Europa Cinemas') or 1,426 projects on av. per year (2% more projects with an annual budget decrease of 6%⁵⁶⁵)</p>
<p>Promotion</p> <p>Around 330 market access projects (or around</p>	<p>Promotion</p> <p>Around 330 market access projects (or around</p>

⁵⁶¹ Initial training was discontinued in the current Programme as there was an expectation that this will be covered by Erasmus+. However, this did not materialise. Programme managers interviewed saw a gap in this area.

⁵⁶² The average yearly spending under the MEDIA development schemes (Single Projects and Slate Funding) increased by 3% compared to predecessor MEDIA.

⁵⁶³ According to the Programme data the spending on this scheme increase from €11.3 million per year under the predecessor MEDIA to €13 million under the current MEDIA Sub-programme.

⁵⁶⁴ Note that the way the project number is used for the Cinema Selective scheme in the Programme data has changed. Under the predecessor MEDIA each unique project number represented all the distributors in the grouping (i.e. the project number was presented as many times in the Programme data as there were distributors in that grouping). In the Programme data for the current Programme there is a unique project number for each distributor.

⁵⁶⁵ Based on yearly average spending figures (Programme data).

Predecessor MEDIA	Current MEDIA Sub-programme
50 per year), around 640 film festivals' projects (around 90 annually) and 32 MEDIA stands	50 per year), around 640 film festivals' projects (around 90 annually) and 32 MEDIA stands
Results	
Training	Training
Average number of participants trained per year: 2,069	Average number of participants trained per year: 1,919 ⁵⁶⁶ (8% decrease ⁵⁶⁷)
Development	Development
Supported around 1,844 unique companies, 1,037 (56%) in high PCCs, 508 (28%) in medium and 299 (17%) in low PCCs Estimated 1,460 audiovisual works (209 per year) supported by Single Projects and Slate Funding schemes went into production; around 850 made it to the market (121 per year)	Supported more companies from medium and low PPCs: 677 unique companies, 201 (30%) in high PCCs, 290 (43%) in medium and 186 (27%) in low PCCs Estimated 585 audiovisual works (195 per year ⁵⁶⁸) supported by Single Projects and Slate Funding schemes went into production ⁵⁶⁹
TV Broadcasting	TV Programming
Production of 461 unique titles of European TV productions supported Supported around 300 unique companies, 190 (63%) in high PCCs, 86 (29%) in medium and 31 (10%) in low PCCs	Production of 165 unique titles of European TV productions supported Supported more companies from medium and low PCC: 140 unique companies, 76 (54%) from high PCCs, 47 (34%) medium and 18 (13%) low PCCs
Distribution	Distribution
Automatic, Selective and Sales Agent projects supported the distribution of a total of around 2,280 unique European titles Distribution schemes supported a total of 1,075 theatrical and 33 non-theatrical distributors	Automatic, Selective and Sales Agent projects supported the distribution of a total of 1,170 unique European titles, 20% more than under the predecessor Programme Distribution schemes supported a total of 590 theatrical and 23 non-theatrical distributors Combined the supported platforms report 1.1 million registered users and 191,149 subscribers ⁵⁷⁰ Projects supported by the Online distribution scheme carry a total of around 160,300 titles, 73% of these are EU films and 44% non-national EU films
Promotion	Promotion
Access to Markets scheme supported 116 unique market access events ⁵⁷¹ , around 200 unique festivals and four MEDIA stands in major market fairs per year	Access to Markets scheme supported 73 unique market access events, around 107 unique festivals and four MEDIA stands in major market fairs per year

⁵⁶⁶ Based on the EACEA participation data provided for the first two years of the current Programme (2016 data has not yet been aggregated).

⁵⁶⁷ With 5% increase in the average yearly budget of the scheme from €7.8 million to €8.2 million.

⁵⁶⁸ This figure could potentially increase as it takes time for the developed AV works to be produced.

⁵⁶⁹ It is too early to examine the share of supported works that have made it to the market, or to extrapolate these figures.

⁵⁷⁰ Situation as of 2016. Similar monitoring data does not exist on the performance of the online platforms supported under predecessor MEDIA.

⁵⁷¹ 45% of the Access to Markets events were supported only once, 31% 2-4 times and further 24% 5-7 times.

Predecessor MEDIA	Current MEDIA Sub-programme
Impacts	
<p>Training</p> <p>Predecessor training overall reported as effective⁵⁷²</p>	<p>Training</p> <p>66% of participants report increased competitiveness due to training⁵⁷³</p>
<p>Development⁵⁷⁴</p> <p>The number of partners (at the end of the development stage): around 4,000, including around 600 international</p> <p>Overall good quality of films supported by Single Projects had an average IMDB rating of 6.5; those supported by Slate Funding projects: 6.4 points⁵⁷⁵</p> <p>Development Single Projects: maintain the scale of operations, increased feasibility of projects and helped to secure follow up funding</p> <p>The Slate Funding scheme: contributed to the longer-term financial stability and strategic planning capacity of the supported companies</p>	<p>Development</p> <p>The number of partners (at the end of the development stage): around 1,530, including around 225 international⁵⁷⁶</p> <p>Quality of audiovisual works supported: it is too early in programme implementation to assess</p> <p>Slate Funding scheme is more effective in terms of audiovisual works that enter the production stage than the Single Projects scheme: 30% vs. 54% of works that enter production)⁵⁷⁷</p> <p>Too early to assess longer-term effects on number of non-national admissions and markets reached, but positive impact on scale of activities and capacity to invest in development</p>
<p>TV Broadcasting</p> <p>Scheme's support extended the pool of partners and enabled better quality of the final product</p> <p>The schemes supports quality productions with average IMDB rating of 7.15 out of 10⁵⁷⁸</p>	<p>TV Programming</p> <p>Scheme's support extended the pool of partners (1,500 partnerships created⁵⁷⁹)</p> <p>The schemes supports quality productions with average IMDB rating of 7.15 out of 10</p> <p>Limited impact on feasibility of projects, but positive impacts on quality of productions</p>
<p>Distribution</p> <p>Cinema Automatic – total 388 million admissions reported in participating countries (2007-2013)</p> <p>Average number of distribution territories for Distribution Automatic: 14.3 (including national territory)⁵⁸⁰</p>	<p>Distribution</p> <p>Cinema Automatic – total 170 million admissions reported in participating countries⁵⁸³, a 3% annual increase compared to predecessor MEDIA⁵⁸⁴</p> <p>Increased average number of distribution territories for Distribution Automatic: 17.9</p>

⁵⁷² Please see Annex 2 for detail.

⁵⁷³ Please see Annex 2 for detail.

⁵⁷⁴ The agreed samples of projects included in the FE on MEDIA Distribution were too small to accurately estimate the number of admissions for supported films, based on the EAO data. EAO admissions data was available on four out of seven Single Projects that reported 138,175 admissions in total or 34,544 admissions per film supported by predecessor MEDIA. The samples are too small to extrapolate with any degree of reliability. For Slate Funding projects no titles are recorded in the Programme data as the projects support slates of films. This is why it was not possible to check the admissions for the audiovisual works supported by this predecessor scheme.

⁵⁷⁵ IMDB average score for is 6.38.

⁵⁷⁶ For Single Projects the number of partners was calculated based on the number and share (15%) of international partners established in relation to the predecessor MEDIA as the current reports do not include this data. For Slate, there were no large differences between the predecessor and the current programmes in terms of the average number of partners per project and the share of international partners (14%).

⁵⁷⁷ Please see Annex 2 and the FE on MEDIA Distribution schemes for detail.

⁵⁷⁸ Because of the limited number of projects included in the FE sample, the mapping was undertaken across the predecessor and current programmes (period 2012-2014) to improve the reliability of results.

⁵⁷⁹ FE on TV schemes.

Predecessor MEDIA	Current MEDIA Sub-programme
<p>Cinema Selective – estimated total admissions in participating countries: 104.1 million⁵⁸¹</p> <p>Average number of distribution territories for Cinema Selective: 19.9 (including national territory)⁵⁸²</p> <p>Average IMDb rating of 6.7 for Cinema Automatic and 6.9 for Cinema Selective on IMDb.</p> <p>Average nomination and awards per film 12.3 and 7.8 respectively for Cinema Automatic, 14.5 and 11.3 respectively for Cinema Selective</p> <p>The main reported impact of the Online Distribution support was on the increased scale of their activities</p>	<p>Cinema Selective – estimated total 34.4 million admissions in participating countries – 23% decrease compared to the predecessor</p> <p>Increased average number of distribution territories for Cinema Selective: 22.8 territories</p> <p>Average IMDb rating of 6.7 for Cinema Automatic and 6.8 for Cinema Selective on IMDb.</p> <p>Average nomination and awards per film 9.9 and 6.6 respectively for Cinema Automatic, 9.1 and 8.6 respectively for Cinema Selective.</p> <p>Growth of the supported VOD services (7% CAGR⁵⁸⁵) has to be seen in the context of huge growth (113%⁵⁸⁶) in SVOD services market</p>
<p>Promotion</p> <p>MEDIA support increased the visibility of their European audiovisual works, the diversity of their audiovisual works’ offer and indirectly increased audiences for the European audiovisual works</p>	<p>Promotion</p> <p>Slightly more effective than the predecessor projects, but more on the side of catering to the needs of audiovisual professionals than audiences development.</p>

Source: ICF and BOP analysis (sources: Programme data, MEDIA FEs, MEDIA survey)

A more detailed presentation of the key outputs, results and impacts of the current MEDIA Sub-programme schemes, organised by area of intervention, is offered Annex 2. The evidence box below presents the positive factors that have facilitated the implementation of the MEDIA Sub-programme and its cumulative, longer-term effects⁵⁸⁷.

Positive factors influencing outputs, results and impacts

The shift of Sub-programme management to DG CNECT and the European Film Forum have improved dialogue with the audiovisual industry, helping to better address its concerns and needs.

The revised LPF provisions have increased the participation from medium PCCs.

Greater recognition and emphasis on promoting coproduction is reinforcing the Sub-programme rationale.

⁵⁸⁰ Based on the EAO Lumiere Database from a sample of films from each year.

⁵⁸³ Extrapolated based on 2014 and 2015 data only. 2016 data not yet available. For comparison purposes the calculation only includes programme countries.

⁵⁸⁴ Based on the extrapolation of 2014 data.

⁵⁸¹ Estimated based on EAO Lumiere data.

⁵⁸² Estimated based on EAO Lumiere data.

⁵⁸⁵ Supported platforms, period 2014-2016.

⁵⁸⁶ EU SVOD revenue increase, period 2010-2014.

⁵⁸⁷ Interviews with programme managers, key informant interviews and open ended responses to the surveys.

Negative factors influencing outputs, results and impacts

Sub-programme primary focus on traditional industries (development and distribution for TV and cinema) and effective lacks mechanisms to proactively adapt and anticipate market developments, partly because of the rigidity of the legal basis⁵⁸⁸.

There is a political and market imperative for higher level of investment in online distribution, but no clarity on how to practically link it to consumer demand.

Training activities supported by the current Sub-programme do not cover the aspect of transition between education and work. This *may* have an adverse effect of retaining European young talent (due to global mobility for training purposes)⁵⁸⁹.

Cumulative / long-term impacts of the Sub-programme

Training and development schemes have created informal networks of producers, notably in the animation and documentary genres i.e. have produced a structuring effect in these sub-sectors.

Support to co-productions under MEDIA training and development schemes has increased the number of co-productions and developed long-term partnerships between co-producing companies.

Distribution and development schemes enabled the development of long lasting international partnership and fostered the ability to engage in international and transnational cooperation.

3.3.9.2 The Culture Sub-programme delivers against most of its planned outputs, results and impacts, however, its contribution to employment remains limited

The Culture Sub-programme and its schemes have delivered most⁵⁹⁰ of their planned outputs, results and impacts. While the Sub-programme is delivering most of its anticipated impacts, its contribution to employment remains somewhat limited. The potential reasons for this lower impact are presented in Section 3.3.3.

According to the Regulation the budget for the current Culture Sub-programme should amount to €64.7 million annually. During the first three years of operations the yearly spending of Culture programme has been 9% below this maximum budget (i.e. €59.6 million per year) despite the sectors' need and requests for more support⁵⁹¹. The total Culture Sub-programme budget has been increased by 15% compared to the predecessor Programme (from a yearly average of €52 million to the current €60 million).

In terms of outputs, the current Culture Sub-programme shows a 45% decrease in terms of number of projects supported (from 264 to 146 on average per year). In terms of cultural and creative operators, the current Culture Sub-programme had 33% less operators benefiting from its support on average per year compared to its predecessor

⁵⁸⁸ There was an argument that the legal basis is not flexible enough, a risk than needs to be considered in any future programmes. As the sector changes swiftly, the development of the legal base lags behind and fails to embrace market opportunities.

⁵⁸⁹ Two interviewees, including one programme manager

⁵⁹⁰ Most respondents with completed projects supported by the current Culture programme have delivered all or most of their outputs and outcomes (98%). About 60% of respondents to the Culture survey reported that their completed projects had delivered all their outputs/outcomes (this was slightly lower compared to 65% of the predecessor Culture Programme). Only one of the 61 respondents (or 1.6%) reported having delivered only a few of the planned outputs and results of their project (while none reported having delivered none of their projects' outputs and results).

⁵⁹¹ E.g. Culture Action Europe, 'Creative Europe Programme Analysis and Recommendations' invites the Commission and the Council to substantially increase the budget of the Sub-programme in the light of low and decreasing success rates for applications.

(433 under the current Programme and 650 under predecessor). The current Programme, however, has a slightly larger share of partners, compared to project leads (partners represent 73% of all beneficiaries currently, compared to 69% under the Predecessor Culture).

In terms of key results, the current Culture Sub-programme appears to be slightly more effective than its predecessor but its effectiveness varied in between schemes. For instance, Cooperation projects involved lead applicants and partners from less EU Member States and third countries than under the predecessor programme but involved five times as many cultural and creative players per project than its predecessor. The Literary Translation schemes led to less translations per year under Creative Europe but led to a much higher number of books printed.

In terms of key impacts, it is too early to assess the impact of the current Culture Sub-programme. Evidence of impact reported for selected schemes are reported in the table below. The comparative assessment of the effectiveness in generating impacts seems to indicate that the current effectiveness of the Culture Sub-Programme is on par with its predecessor. For instance, Cooperation projects reached out to 26% less people under Creative Europe than under its predecessor while the achievements in terms of impact on increasing the diversity of activities undertaken is broadly similar. The literary translation scheme achieved a significantly higher number of books sold per year than under the Culture predecessor programme.

Table 17 offers a summary of the key outputs, outcomes and impacts of the current Culture Sub-programme in a comparative way its predecessor.

Table 17. Key outputs, results and impacts of the Culture Sub-programme

Predecessor Culture	Current Culture Sub-programme
Outputs	
<p>Cooperation projects</p> <p>Total of 786 projects: 695 Cooperation Measures, 80 Multi-Annual Cooperation Projects and 11 Cooperation Projects between organisations involved in cultural policy analysis</p>	<p>Cooperation projects</p> <p>Total of 211 projects: 53 Large-Scale Cooperation Projects and 158 Small-Scale Cooperation Projects, 5% increase in budget</p>
<p>Cultural bodies</p> <p>207 annual grants signed with between 27 and 42 networks were funded in the period</p>	<p>European Networks</p> <p>Support for 23 Networks (with 68 total annual grants in the period), a 227% annual increase in spending compared to 'Cultural bodies'</p> <p>European Platforms</p> <p>Support for eight European Platforms (a new action line under Creative Europe, representing 3% of the total Sub-programme investment)</p> <p>Each platform had 13 members on average or a total of around 100 members</p>
<p>Literary translation</p> <p>641 Literary translation projects supported</p>	<p>Literary translation</p> <p>172 Literary translation projects supported</p>
Results	
<p>Cooperation projects</p> <p>Lead applicants from 32 countries (including 5 non-EU countries) and partners from 39 countries (including 11 non-EU countries)</p> <p>A combined total of 4,230 activities, including 3,782 activities involving creation of art works and 149 other types of activities⁵⁹²</p> <p>Supported the transnational mobility of on average 273 cultural and creative players per project or an estimated number of cultural and creative players involved in supported projects⁵⁹³ – 215,000</p> <p>Majority of Cooperation Projects delivered all or most of their planned outputs/results⁵⁹⁴</p>	<p>Cooperation projects</p> <p>Lead applicants from 25 countries (including 3 non-EU countries) and partners from 36 countries (including 8 non-EU countries)⁵⁹⁵</p> <p>Projects achieved 46% greater number of activities than targeted⁵⁹⁶</p> <p>Projects on average delivered support to more than three times as many individual players as planned</p> <p>Supported the transnational mobility of on average 1,363 cultural and creative players per project or estimated 287,600 mobility experiences</p> <p>Cooperation Projects continued to be effective in delivering their expected outputs/results⁵⁹⁷</p>
Cultural bodies	European Networks

⁵⁹² Extrapolation based on a number of activities per year (selected years, 30 2008 reports). The number of activities reported varied considerably between projects and type of activities. The largest number of activities reported were the creation of artworks – 3,782 activities; with 'seminars, conferences, symposiums and debates' the next highest at 149 activities.

⁵⁹³ Based on the number of projects (Programme data) and average number of CC players engaged per project (FE on Cooperation projects)

⁵⁹⁴ Culture survey, confirmed by a mapping of a sample of final reports

⁵⁹⁵ The participation in this scheme in terms of countries' coverage is likely to grow as the Programme's implementation advances.

⁵⁹⁶ Please see Annex 2 for detail.

⁵⁹⁷ Culture survey data corroborated by reports mapping.

Predecessor Culture	Current Culture Sub-programme
<p>Estimated number of CC players involved in supported projects – 36,000⁵⁹⁸</p> <p>The projects were broadly effective in delivering their expected outputs/results⁵⁹⁹</p>	<p>Estimated average number of mobility experiences provided by networks in 2014: 3,462 (1,841 planned) or around 10,300 in total, exceeding the target by 88%</p> <p>European Platforms</p> <p>On average each platform engaged with around 130 cultural and creative players, reaching a total of more than 1,000 artists and professionals</p>
<p>Literary translation</p> <p>3,161 translations undertaken, estimated 3.7million translated books printed</p>	<p>Literary translation</p> <p>394 translations of 1,066 different titles, estimated 1.6 million translations will be printed</p>
Impacts	
<p>Cooperation projects</p> <p>Total audiences – estimated 8,830,000 people reached (1.26 million per year on average)</p> <p>All three schemes have achieved most of their key expected impacts</p> <p>Considerable impact reported on an increased number/scale of activities, increased diversity of the type of activities and improved access to CC works among audiences⁶⁰⁰</p>	<p>Cooperation projects</p> <p>Total audiences – estimated 3,002,000 people reached (1 million per year on average), including 55% youth</p> <p>Cooperation Projects have been successful in achieving most of their key expected impacts, with strong Programme impact on the number and diversity of activities implemented, on an increased number/scale of activities, as well as improved access to CC works among audiences⁶⁰¹ and deepening professional collaboration</p>
<p>Cultural bodies</p> <p>Projects funded under this scheme were effective in achieving some but not all of their key expected impacts</p> <p>Considerable impacts of this scheme were an increased number/scale of activities undertaken, and increased diversity of the type of activities undertaken</p> <p>Less of an impact on increasing the use of digital technologies for the development of new markets for CC works and for the promotion of CC works</p>	<p>European Networks</p> <p>As their predecessors, Networks projects have achieved some but not all their key expected impacts. They had strong impact on increasing the diversity of activities undertaken; and were more likely to improve access to cultural and creative works among audiences as their predecessors</p> <p>European Platforms</p> <p>On average each platform reached 29,330 people or a total estimated 234,600 people</p>
<p>Literary translation</p> <p>At least 2.9 million translated books supported</p>	<p>Literary translation</p> <p>Estimated 1.4 million books sold (either as hard</p>

⁵⁹⁸ No data on transnational mobility. No monitoring data available for the period. Estimate based on an average number of 34 networks supported in the period and the current Programme performance.

⁵⁹⁹ Culture survey. For more detail, please see Annex 2.

⁶⁰⁰ Please see Annex 2 for more detail.

⁶⁰¹ Please see Annex 2 for more detail.

Predecessor Culture	Current Culture Sub-programme
by the predecessor Culture Programme have been sold	printed copies or ebooks)
The average price for a translated book indicated in the final reports mapped was €13.32	The average Programme investment per book sold €8.37 (€2.39 more per book than under the predecessor Programme ⁶⁰²).
The average Programme investment per book sold €5.98	

Source: ICF and BOP analysis (sources: Programme data, Culture FEs, Culture survey)

A more detailed presentation of the key outputs, results and impacts of the current Culture Sub-programme schemes, organised by area of intervention, is offered in Annex 2. The evidence box below presents the positive factors that have facilitated the implementation of the Culture Sub-programme and its cumulative, longer-term effects⁶⁰³.

Positive factors influencing outputs, results and impacts

The integration Culture Sub-programme in the EU cultural policy has had an impact on driving national cultural policy making⁶⁰⁴ and also allows the Sub-programme to evolve together with the policy objectives.

Sub-programme support to the publishing sector has a strong intervention rationale and is an example of culture economic benefits.

There is a recognised need to extend the Sub-programme support through schemes designed specifically to address the needs of individual Culture sub-sectors e.g. music, architecture or design, similarity to the current targeted support to the European publishing sector through Literary translation scheme (but no flexibility to achieve this with the current legal basis)⁶⁰⁵.

Negative factors influencing outputs, results and impacts

Small size organisations from small countries report difficulties in accessing the Sub-programme support for bigger projects or as lead partners (these issues have been explored in detail in Section 3.3.5.3).

Support measures to the publishing industry, although effective policy wise, involve disproportionate administrative burden relative to their size of the scheme and are not geographically well balanced (number of applications suggests that the scheme is of lower relevance for publishers operating in larger countries e.g. UK, Spain, France and Germany⁶⁰⁶).

3.3.9.3 The Cross-sectoral Strand overall delivers on its expected outputs and results under transnational policy cooperation and support provided by CEDs, but outputs still need to lead to results for the CCS GF and greater focus on cross-sectoral projects needed

The Cross-sectoral strand was allocated €190 million of the overall Programme budget (13%). It supports actions under three priority areas: the Guarantee Facility, the

⁶⁰² However, according to the results of the Culture survey 62% of the translation projects supported during the current Programme period are still ongoing and this cost is likely to go down, as more translated books are sold.

⁶⁰³ Interviews with programme managers, key informant interviews and open ended responses to the surveys.

⁶⁰⁴ Four key informant interviews

⁶⁰⁵ Interviews with three programme managers.

⁶⁰⁶ FE on Literary Translation projects

promotion of transnational policy cooperation, and Creative Europe Desks. This section focuses on the second and third priority areas.⁶⁰⁷

Overall, there was an underspend of €2.3 million compared to the amounts that should be available under the strand⁶⁰⁸. This is reflected in feedback from internal stakeholders, which suggested this was in part due to lack of agreement between, or decisions from, the DGs on how to spend the funds⁶⁰⁹.

3.3.9.4 Outputs, outcomes and impacts of the CCS GF

The CCS GF has been implemented from 2016 onwards⁶¹⁰ and therefore its results are commensurate to the one and a half year period of its implementation. As of the first semester 2017, the CCS GF led to the following outputs:

- A planned budgetary contribution from the EC of €121 million in guarantees across from 2016 to 2020
- The full commitment of € 14.8 million of the 2016 budget,
- One delegation agreement with the European Investment Fund;
- The signature of three guarantee agreements with 3 financial intermediaries in 2016 (ES, FR, RO)
- One additional guarantee was under approval
- Expressions of interests for other financial intermediaries located in ten additional Member States
- Awareness raising activities have been conducted including info days on access to finance, presentation in film festivals where financial institutions are present (e.g. Cannes and Venice film festivals).

In terms of outcomes, the emerging results of the CCS GF are presented in the table below.

Table 18. Signed Guarantee agreements and effect on the amounts of loans and number of SMEs reached in the sector

Guarantee agreement	Amounts in loans covered	Estimated number of creative and culture sectors entities accessing to loan financing
EIF and BPI France	€30 million	200 SMEs
EIF and CERSA	€100 million in counter guarantees leading to €150 million in loans	1000 SMEs
EIF and Libra Internet Bank	€10 million	200 SMEs

Source: EIF Website

The €121 million of committed budget could lead to a maximum of €1 billion in loans to SMEs over 2016 to 2020 period. This potentially represents 15% of the financing gap of SMEs in the sector per year.

⁶⁰⁷ The results of the Guarantee Facility are addressed under Section 3.3.6.2.

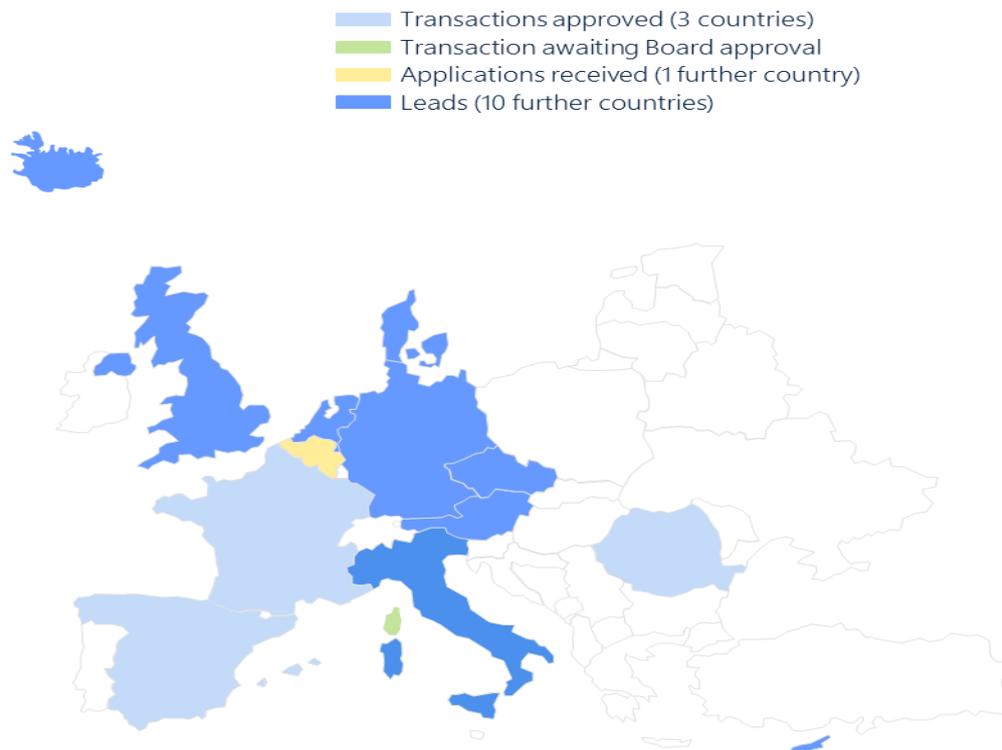
⁶⁰⁸ The foreseen amounts are provided by the Regulation (i.e. 13% or €190 million). Programme data shows, that the amount foreseen for the CCS Guarantee Facility subtracted, the Programme has spent 7.7 million on Cross-sectoral Strand, while 9.9 should be made available.

⁶⁰⁹ Two interviews with programme managers.

⁶¹⁰ Note that the delay of the start-up of the CCS GF is due to financial allocations made available 2 years after the start of the budget.

Financial intermediaries from a total of 14 Member States either successfully applied, applied and or were thinking of applying (see figure below).

Figure 7. Geographical spread of current of or potential beneficiaries of the CCS GF.



Source: EIF presentation on the CCS GF (January 2017)

3.3.9.5 The promotion of transnational policy cooperation

In terms of the outputs of the transnational policy cooperation priority area, a total of €7.6 million has so far been awarded to the following actions from 2014 to 2016:

- €2.4 million to support 12 Refugee Integration projects (seven led by applicants based in high PCC countries),
- €0.6 million to support to eight Presidency Conferences,
- €1.1 million to the EU membership of the EAO (for three years),
- €2.3 million to three Policy development activities⁶¹¹,
- €0.6 million to three actions under Studies and evaluations,
- €0.6 million to one action under Communication and valorisation activities.

These figures represent a considerable change compared to the planned budgets⁶¹²: Conferences, Studies and evaluations, and Communication and valorisation activities all registered a lower spend than budgeted, while Refugee Integration⁶¹³ and Policy development received more funds.

⁶¹¹ Focusing on support to innovation in the CCS; structured dialogue; and policy peer learning

⁶¹² As per the Annual Work Programmes (2014-16)

⁶¹³ The call attracted 274 applications, **3 times more than expected, resulting in an increase in its budget** (https://ec.europa.eu/programmes/creative-europe/news/20161006-selection-results-refugee-integration-projects_en).

In terms of the priority area's results, evidence of its impact is limited to the EAO and Refugee call. Its recent introduction and the limited number of activities supported under some actions, means that no real long-term impacts can yet be evidenced.

There is currently no clear understanding of the results of the activities under this priority, as evidenced by the findings from the MEDIA and Culture surveys, as well as interviews with beneficiaries and stakeholders.⁶¹⁴ While beneficiaries' lack of awareness is explained by the fact that most grants are not targeted at sector organisations but address higher-level policy activity, overall limited impact was also reported by internal stakeholders, CEDs and national sector stakeholders (e.g. cultural ministries, national funding bodies), with many arguing that this is due to the limited number of actions supported so far. Notably, most external stakeholders understand the Cross-sectoral strand as the Guarantee Facility only, and are unclear about what else it supports.

The lack of evidence of the impact of the priority area's support to Policy development; Studies and evaluations; and Communication and valorisation can be explained by the small number of activities funded so far (seven in total). Beneficiaries and sector stakeholders are aware of the EAO and Refugee call, but do not connect these activities to the Cross-sectoral strand. Evidence from beneficiary and national sector stakeholder interviews nevertheless suggests that through support to the EAO (both membership and through the 2016 PAGODA agreement), the priority area contributes to the Strand's aim to improve *'data collection leading to better evidence based policies and investment'*. Many AV sector interviewees highlighted the benefits of EAO membership in providing usable transnational data that supports the monitoring and understanding of the sector, strongly indicating that the EAO provides a valuable outcome for the AV sector. The same is not yet achieved for the culture sector: interviewees (e.g. beneficiaries, CEDs in the cultural sector) repeatedly mentioned the need for similar data collection for the culture sector.

There is limited evidence to date of the impact of the Refugee Integration projects in contributing to the Strand's aim to support *'refugees' increased feeling of integration and EU citizen's understanding of refugee populations'*, as the projects were funded in 2016. The outcome of the Refugee call was considered limited by stakeholders at the time of the evaluation, with interviewees stating that the budget was too low to achieve noticeable outcomes⁶¹⁵.

3.3.9.6 CEDs are overall effective, but more could be done to explore the benefits of their integration

Creative Europe Desks (CEDs) are active in each Member State and in all other countries participating in the programme. Since 2014, CEDs can be established as fully merged desks covering the whole programme or organised in offices according to the sub-programmes.

Their number and structure is decided at national level on the basis of different factors such as sectors dimension and policy priorities. While this flexibility allows countries to adapt to the specific needs of national contexts, it could also cause an unbalance between resources allocated to MEDIA and Culture desks⁶¹⁶

⁶¹⁴ The MEDIA/ Culture survey and interviews with internal and external stakeholders and beneficiaries suggest a lack of awareness of the priority area's outcomes and impacts. 33 per cent of MEDIA survey respondents and 75 per cent of Culture survey respondents (including 58 per cent who did not respond at all) had no opinion about the effects of the integration of MEDIA, Culture and the Cross-sectoral strand. A majority of interviewed sector stakeholders and beneficiaries felt unable to answer the same question as they had too little knowledge.

⁶¹⁵ Note that the projects started at the same time as the surveys were undertaken. This can explain that respondents were not aware of the outcomes which were still to be delivered. Additionally the budget was increased considerably to enable more projects than initially planned to be selected.

⁶¹⁶ For example, Germany counts four MEDIA desks but only one Culture desk.

Creative Europe spent around €15 million (or 40% of the total budget of the Cross-sectoral Strand) on the services of Desks between 2014 and 2016. The annual spending on CEDs has increased by 6%, comparable to the predecessor Programmes spending on MEDIA desks and antennae and the Cultural Contact Points (from €4.75 million to €5.05 million per year on average).

The CEDs provide a wide range of services that span from promoting the programme (mostly through their website, social media, paper based advertisement and promotional merchandise) and the schemes to assisting organisations with their applications.⁶¹⁷ Overall stakeholders are strongly satisfied with CEDs' support and the way they reached out to potential applicants,⁶¹⁸ although some smaller stakeholders (e.g. small culture organisations or micro companies in the audiovisual sector) feel that not enough efforts are done in order to reach them.⁶¹⁹

The unification of the predecessor programmes under Creative Europe encouraged the development of cross-sectoral initiatives, bringing together audiovisual players and culture organisation. However, it seems that less than a fifth of the total events organised in 2015 by the CEDs were joint initiatives, showing that more could be done in this area.⁶²⁰

3.3.10 Creative Europe is open to a diversity of participants, including smaller operators and companies

The Creative Europe programme and predecessor programmes supported a diversity of organisations in terms of geographical spread, type, size and sector, with, based on programme data, the Culture strand being more diverse than the MEDIA strand. However, without having data on how the CCS are structured in the participating countries (e.g. number of organisations, by type and size)⁶²¹, it is not possible to establish if the diversity of programme participation mirrors reality. In addition, with no monitoring activities in place, no issues with regards to the social-demographic diversity in participation were found nor were episodes of discrimination reported.

From a geographical point of view, the FEs conclude that, overall, the organisations participating in the analysed schemes are well spread across Europe. Level playing fields provisions applied under the MEDIA sub-programme seem to have ensured a higher participation from Low and Medium PCCs countries, showing improvements over the years.⁶²² Spending cuts in the culture sector in some countries may have impacted on the ability of culture organisation to secure match funding needed to apply for Creative Europe funding, finally hindering their participation to the programme.

⁶¹⁷ Data from 2015 provided by the EACEA distinguish between three main communication channels used: emails, phone calls and meetings. However, data is too patchy to provide any useful insight of the level of activity of individual Desks.

⁶¹⁸ Around 95% of respondents (only beneficiaries of the current Creative Europe programme, and those who chose to answer this question) to the MEDIA survey and 73% of respondents to the Culture survey indicated that they were aware of the CEDs since they applied for funding (or even before that). A further 4% of MEDIA and 18% of Culture survey respondents acknowledged that they only found out about the CEDs once they had been awarded project funding. Around 1% of MEDIA and 9% of Culture (hence around 10% of Creative Europe) beneficiaries who replied to this question reported that they were not aware of the CEDs. Satisfaction with the quality of information provided by the CEDs overall high: 89% of respondents to this question in relation to the Culture sub-programme and 87% in relation to the MEDIA Sub-programme. About 79% (N=266) of respondents to the Open public consultation stated to agree or strongly agree with the following statement 'The Creative Europe Culture desks effectively reach out to potential applicants and support them in the application process'

⁶¹⁹ This was mentioned by eight respondents to the Open public consultation

⁶²⁰ Based on data from 2015 provided by the EACEA. CEDs in two countries (CY and IS) were very active in developing joint initiatives (75% and 81% respectively).

⁶²¹ Note that if Eurostat provide statistics by NACE sectors, the NACE sectors do not strictly correspond to the sectors mentioned in the Creative Europe Regulation.

⁶²² For example, while under the Development scheme of the Predecessor Programme, the top three countries France, the UK and Germany together secured nearly 40% of all Single Projects supported between 2007 and 2013, under Creative Europe, the top three countries only accounted for 20% of the supported projects. For the top five, the shares are 55% and 31%, respectively.

The MEDIA Sub-programme was less diverse in terms of new organisations supported than the Culture Sub-programme. On average, companies were supported 4.6 times under current MEDIA, whilst the ratio between the projects supported and the operators supported was only 0.3 under Culture Sub-programme. This may be partly due to the different characteristics of sectors, the Culture sector being less uniform than the audiovisual sector.

The Culture pool of beneficiaries is composed mostly of Public sector organisations (24%) and Non-profit organisations (61%). Survey data indicates that 93% of these non-for-profit organisations were micro (71%) and small (22%) operators. Majority (77%) of these organisations were associations, and further one fourth (23%) were non-profit companies. The MEDIA programmes mostly catered to the needs of private companies (74%), and to a much smaller degree (21%) non-profit associations.⁶²³

3.3.11 The Creative Europe schemes have clear objectives and the indicators to monitor their performance have been proposed by the new Programme Monitoring Framework (PMF)⁶²⁴

Whilst the Regulation establishing the Creative Europe Programme includes specific references to monitoring and provides a list of indicators to be used for the measurement of the Programme's performance, monitoring practices at Programme level are currently very limited. The challenges associated with the current monitoring framework relate to:

- The Creative Europe Programme design: The hierarchy of general and specific objectives listed in the Regulation applies uniformly to the three strands of the Programme, however there are numerous (15) and repetitive (for MEDIA and Culture) priorities that could be easily generalise to apply the whole CCS;
- Nature of the monitoring data currently reported: indicators specified in the Regulation are not appropriate for the purpose of monitoring of the Programme's progress and performance against intended objectives⁶²⁵. Current reporting and monitoring efforts have focused on the application stage of the Programme's lifecycle⁶²⁶ and are therefore very limited;
- Roles and responsibilities with regard to Programme monitoring: the EACEA runs most of the reporting activities. The beneficiaries' reporting requirements does not allow measurement of progress nor performance against the Programme's intended outcomes and objectives. Last the role of Creative Europe desk in conducting monitoring activities could be much more strengthened.

The note on the PMF suggests a new performance monitoring framework with indicators measuring performance at programme, sub-programme and scheme level corresponding to general and specific objectives of the Creative Europe Programme. Context indicators are further suggested to enable comparison with the creative and culture sector as whole. The note also details data collection processes and systems that can be used to operationalise the new PMF.

⁶²³ Based on MEDIA and Culture survey data in relation to the current Programme.

⁶²⁴ This section relates to the evaluation question 'Do the schemes and actions have clear objectives and indicators of performance?'

⁶²⁵ A review of the indicators shows that they are a combination of output indicators, and result indicators. Only a few indicators could be qualified as impact. Finally, a number of indicators are context indicators that assess overall market performance and in and by themselves do not allow for the measurement of the Programme's performance.

⁶²⁶ i.e. number of successful application, amounts of budget awarded, number of entities awarded funding, etc.

3.4 Efficiency

Efficiency aims at assessing the costs and the benefits of the Creative Europe Programme, at mid-stage, and its predecessor programmes, and establishing the factors driving those costs and benefits.

This section reports on whether the costs of the EU programmes were proportionate to the benefits they produced and whether there is potential to reduce inefficiencies.

3.4.1 Budgets allocated to the Programmes were not sufficient to meet objectives of creating major impact of a European scale and/or at sectoral level

Considering the size and range of the audiovisual and cultural sectors at European level and the geographical areas covered by the Programmes evaluated, the size of the budgets of Creative Europe and its predecessor programmes were not sufficient to create major impact of a European scale and/or at sectoral level. This is especially the case for the Culture Programme and successor sub-programme. However, the actions implemented contributed to specific impacts for specific schemes and in specific sectors (please refer to Section 3.3 for more details).

The size of the CCS sector in Europe represented approximately EUR 560 billion (or 4.5%) of the EU GDP in 2014 and employed 8.5 million workers (3.8% of the total European Workforce^{627 628 629 630}). In comparison, EUR 1.1 billion were channelled to the CCS sector by the three predecessor programmes over 2007 to 2013⁶³¹.

The earmarked budget for the Creative Europe Programme is €1.46 billion for 2014-2020⁶³². Mid-way through implementation, EUR 544 million had been awarded under Creative Europe. Creative Europe was implemented efficiently with the absorption rate for the programme reaching 86.7% of the planned budget from 2014 to 2016.⁶³³ Annual amounts awarded represent less than 0.1% of the estimated annual contribution of the sectors to the EU GDP. Given the programme budget, Creative Europe and predecessor programme could only have been expected to somewhat contribute to generate impacts at sector and/or EU level⁶³⁴.

⁶²⁷ In the CCS, an EU-wide mapping was carried out by KEA in 2006. It found that in 2006, the CCS accounted for 2.6 % of the EU GDP and 3.1 % of the total employed population, the equivalent of 5.8 million jobs.

⁶²⁸ A TERA Consultants study from 2014 found that the CCS employed 3.8% of the total European workforce, or approximately 8.5 million workers, and contributed 4.5%, or approximately EUR 560 billion, to the combined GDP of the EU 28 Member States source: TERA Consultants, Building a Digital Economy: The importance of Saving Jobs in the EU's creative industries", cited in Commission staff working paper – Creative Europe Programme Impact Assessment, SEC/2011/1399 final; /<http://eur-lex.europa.eu/legal-content/fr/ALL/?uri=CELEX:52011SC1399>

⁶²⁹ An Ernst and Young Study from 2014 estimated that the CCS contributed to 4.2 % of Europe's GDP and 3.3 % of the EU's active population in terms of employment, i.e. 7 million jobs Source: KEA, Feasibility study on data collection and analysis in CCS in the EU, 2015

⁶³⁰ In the audiovisual sector, the TERA Consultants study from 2014 found that the size of the sector was estimated at EUR 107.4 billion, with 1.2 million highly qualified jobs. According to the European Audio-visual Observatory, total revenues for the European AV market in 2013 came to approximately EUR 133 billion. According to Eurostat, SBS, in 2012 almost 110,000 companies operated in the AV sector. From EU LFS data, in 2013 the sector employed approximately 810,000 workers. These figures include both the private and public sector. This was an increase from 739,000 in 2008.

⁶³¹ This represented an average yearly spend of EUR 164 million overall, EUR 110 million for the MEDIA Programme, EUR 2 million under MEDIA Mundus and 52 million under the Culture Programme.

⁶³² This amounts to an overall annual average of 209 million euros and an annual average of 117 million Euros under the MEDIA programme, 64.7 million Euros under the Culture programme and 27 million Euros under the Cross-sectoral strand.

⁶³³ The figure does not include the CCF GF budget implementation rate, which incurred some delays but which are expected to catch-up in the remaining years of the programme i.e. from 2016 and onwards.

⁶³⁴ This was corroborated by the findings of the OPC where 47% of MEDIA sub-programme stakeholders and 52% of the Culture Sub-Programme stakeholders considered that the budget of the Creative Europe Programme is insufficient to address the key challenges of the European cultural and creative sector

At (sub-) programme level, 68% of the total budget under the previous programming period went to the MEDIA and MEDIA Mundus programmes (EUR768.9 and EUR 13.8 million, respectively). Under Creative Europe, at mid-term, the audio-visual sector had received 60% of total amounts awarded. Some stakeholders considered that the share of the budgets allocated to support the audio-visual industry under the MEDIA Programmes was disproportionate in comparison to support provided to CCS under the Culture Sub-programme. Such question was not in the scope of the evaluation and therefore such claims could not be substantiated as part of the evaluation⁶³⁵.

Table 19. Amounts awarded (in EUR million) under Creative Europe at mid-term (2016 data incl.) and under the predecessor programmes

	Predecessor programmes			Under Creative Europe, at mid-term		
	Amounts awarded (Eur million)	Total organisations supported	Average amount awarded per organisation supported (EUR thousand)	Amounts awarded (EUR million)	Total organisations supported	Average amount awarded per organisation supported (EUR thousand)
MEDIA programme	768.9	2,800	272	326	1,300	255
Media Mundus	13.8	60	229			
Culture programme	364.4	4,550	80	179	1,280	138
Cross-sectoral strand				37.8 ⁶³⁶	150 (incl. CCS committed to CCS GF)	252 (incl. CCS GF support)
Total programmes	1,147	7,410	155	544	2,730	199

ICF analysis of EC provided databases with financial data (Maximum grant awarded)

The table below summarises the variations in average yearly amounts awarded to the key schemes of the predecessor programmes that have continued under Creative Europe. Tables A3.1 and A3.2 in Annex 3 further display the average cost per project allocated under key MEDIA and Culture schemes over the two programme periods.

Table 20. Variation in average annual amounts by schemes across the two programming periods

Programmes	Average annual amounts increased under Creative Europe	Average annual amounts decreased under Creative Europe	Average annual amounts largely the same
MEDIA	Sales Agents (+70%);	Development - Single	Distribution Automatic (-

⁶³⁵ To make such a claim would require looking in detail into the contribution of each sub-sector within the scope of the programme to EU GDP. In fairness MEDIA and MEDIA Mundus Programme and successor programme target solely targeted the Audio-visual sector and steps in the value chain compared to the Culture programme and its successor programme, which tend to cover all other CCS sectors.

⁶³⁶ Including 2016 commitments for the CCS GF (€14.8 million).

Programmes	Average annual amounts increased under Creative Europe	Average annual amounts decreased under Creative Europe	Average annual amounts largely the same
schemes	Access to Markets (+26%); Development - Slate funding (+20%); TV Broadcasting / TV Programming (+15%); Stands (+14%); VOD / Online distribution (+4%).	Projects (-20%); Distribution Selective (-18%); Training (-4%).	2%); Cinema Networks (-0.5%).
Culture schemes	European Networks (+227%); Literary Translation (+58%); Cooperation Projects (+5%).	NA	Platforms (support for Platforms' projects only started with Creative Europe)

- The reduced number of schemes under the current programme is an indication of improved focus. There is still room for improvement however⁶³⁷.

Financial support allocated to the CEDs, as part of the cross sectoral strands for the later, was considered as crucial and to be maintained at its current scale, considering their key role in supporting interested cultural and creative entities in producing quality applications, and acting as national information points on the Programme.

3.4.2 Shortcomings at different stages of the implementation of the Programmes were identified and, although improvements have been made over time, there is room for further improvement

Shortcomings mainly relate to the governance and management aspects of the implementation of the programme. They are considered in the section below by stage of the programming cycle: application and review stage, reporting and monitoring. Improvements were noted from one programming period to another. Yet more room for improvement exists mainly considering that the merger of the Culture and Media programmes under one umbrella did not fully deliver the intended benefits. For instance, efficiencies in the management costs of the programme did not materialised as the number of staff dedicated to the Creative Europe programme increased slightly by 5% compared to the predecessor programme⁶³⁸ alongside similar increases in the yearly operational budget⁶³⁹ and administrative costs of running the programmes⁶⁴⁰.

⁶³⁷ This was also noted by the CAE 2017 report which called for "more clarity in the European Platforms strand with respect to its policy rationale and sustainability, [...] in the literary translation strand with regards to its policy objectives. [...] Notes that under its current definition and budget, the literary translation strand does not sufficiently contribute to promote linguistic diversity".

⁶³⁸ According to the EACEA annual work programmes, covering the period 2007-2016 under evaluation the average estimated number of FTEs allocated to the management of operational aspects of the programmes increased from 99 on average per year under the predecessor programmes to 104 on average under Creative Europe. In addition, 23 FTEs on average per year have been allocated for the management of the horizontal (administrative, coordination and communication) aspects related to the Creative Europe Programme. There is no comparable data on the horizontal FTEs in relation to the predecessor programmes. .

⁶³⁹ Annual average budget for all three predecessor programmes was €164 million, compared to €181 million during the first three years of Creative Europe (11% increase). However, the increase is only 3%, if the budget spent on the newly created Cross-sectoral Strand is omitted from the calculation.

3.4.2.1 Efficiency of the application stage and related processes

Overall, the application processes were clear to the applicants but slightly burdensome⁶⁴¹. As mentioned in management processes are more bureaucratic than for some of the Member States funds. Simplification of the application process took place from one programming period to another⁶⁴². This concerned, inter alia, the digitisation of the application process, clearer templates and guidelines; higher selection threshold⁶⁴³, more focused criteria as well as other simplifications introduced⁶⁴⁴.

Overall, less than half of survey respondents regarded the application process as being more complex under Creative Europe. The reasons for the latter relate to increased level of detail required, the requirement for the development of detailed financial plans (including predicting costs) and accounting procedures.

The administrative burden in applying for funding under the MEDIA (sub) Programme concerned the high volume and detail of information required, which may not be proportionate to certain projects (i.e. development schemes⁶⁴⁵), or to some of the target group (e.g. small entities); perceived redundancy in some questions; time and capacity required which are hard to bear for small NGOs; changes in conditions and deadlines mid-way in application processes which disturb planning; length of time required to obtain a Participant Identification Code (i.e. during the first stage of application).

The administrative burden in applying for funding under the Culture (sub) Programme concerned the associated costs (e.g. translation costs), the difficulties in developing joint financial proposal or addressing the legal and business requirements of the application process.

Several interviewees pointed out that the time to prepare and submit an application represent at least 1 FTE for one month. Illustrative evidence is reported as follows:

- Single Project beneficiaries reported they needed between four and eight weeks of work for one member of staff to draft the application and for Slate funding, estimates range from between eight and sixteen weeks of work for one member staff to apply.
- Beneficiaries of the TV programming scheme reported about four to six weeks of one person work to prepare the application.

⁶⁴⁰ The annual administrative costs related to running the Programme have increased by 2% (€238,467) on average compared to the predecessor programmes.

⁶⁴¹ Under Creative Europe, MEDIA Sub-programme respondents considered, overwhelmingly, that application processes had been very clear: 95% (377) of survey respondents (Q89) indicated that the application process for their Creative Europe project had been 'very clear' or 'clear'. 38% (153) indicated that the preparation of their application to Creative Europe co-funding had been either 'hard' or 'very hard'. As for respondents to the Culture Programme surveyed: the majority of respondents (62% (268)) had considered that the application process for their Creative Europe project had been 'quite clear'. 29% (124) indicated it had been 'very clear'

⁶⁴² According to survey data, out of 269 survey respondents had received support under both the current MEDIA Sub-programme and the predecessor MEDIA Programme, 58% of respondents (156) indicated that that the procedures for applying had become easier. As for respondents to the Culture Programme surveyed: 54% (235) considered that the preparation of their project's application for Creative Europe co-funding had been either 'hard' (40% (172)) or 'very hard' (14.5% (63)). 41% (178) considered it had neither been 'hard' nor 'easy' (Q82).

⁶⁴³ A higher selection threshold has the advantage of avoiding low quality applications and the unnecessary processing of some of those applications.

⁶⁴⁴ E.g. for the review of the MEDIA Single Project under the current programme, a third evaluator is called in only when the first two have not reached an agreement; simplified budget and report templates; the ability to submit documents only if the project is selected; the ability to use lump sums rather than detailed budgets.

⁶⁴⁵ There were several comments on the relevance of requirements under applications for development funding, e.g. the level of detail and forward planning required (e.g. devising marketing strategies) at development stage were not considered relevant nor easily manageable.

- Under the Culture Programme the preparation and submission of an application took at least one month to up to two months' worth of work⁶⁴⁶.

Lastly, the communication of the rationale for selection and feedback provided could be improved. Views on the level of transparency of selection process and the feedback the applications were mixed. Some stakeholders questioned the consistency of external experts' approaches to proposal selections whilst other stakeholders indicated that selection procedures had been transparent and fair. Similarly, some argued that feedback on accepted and rejected applications had been detailed and constructive whilst others indicated it had been insufficient⁶⁴⁷.

3.4.2.2 Low success rates are an indicator of inefficiencies in the management of schemes concerned

The success rate declined from one programming period to another. Low success rates reflects that a large number of applications received are of a low quality / ineligible or that the schemes are insufficiently funded compared to the potential interest they generate⁶⁴⁸. The success rate for the schemes under Creative Europe was 16% for the schemes under the Culture sub-programme as compared to 26% for the schemes under the Culture predecessor programme. The success rate for the schemes under Creative Europe was 39% for the schemes under the MEDIA Sub-programme as compared to 47% for the schemes under the MEDIA predecessor programme. Success rates of a selection of schemes are presented in the tables A3.3 and A3.4 in Annex 3. Under the selected MEDIA schemes, the ineligibility rate was the highest (40%) under the Creative Europe Development - Video Games scheme. Low success rates have an impact on the efficiency of programme (or programmes) management since they add burden to the review process for EACEA. The quality of application guidelines and the Desks are in this regard key factors in ensuring that applicants are equipped to submit appropriate applications. Creative Europe Desk and predecessor entities were the main source of information for applicants⁶⁴⁹. Whilst survey respondents rated the information provided by such entities as 'good'⁶⁵⁰, the quality of support provided was uneven across countries and Programmes.

Some interviewees commented that some national Desks had focused on getting a high volume of applications sometimes at the expense on the quality and likelihood of success of applications. Some national desk did not provide sufficient support to interested entities in understanding the intricacies of different schemes, and related application procedures, nor in making an informed assessment about their capacity to invest time and resources into applying to the Programmes (also in comparison also to other available funds), or in their networking efforts at international level (particularly the smallest entities). Finally some were considered as insufficiently proactive in reaching out to potential beneficiaries.

⁶⁴⁶ Survey results and Culture Action Europe, *Creative Europe programme analysis and recommendations*, 2017

⁶⁴⁷ This finding is also consistent with the conclusions of the 2017 Culture Action Europe, Creative Europe programme analysis and recommendations Report.

⁶⁴⁸ A few applications have been marked as 'reserve' or as 'withdrawn'. They were counted in the total. They are not included under the 'ineligible' category.

⁶⁴⁹ 47% of respondents (175) reported that CEDs had been the main source of information when 54% (199) reported that EACEA had been and 49% (96) responded 'Other'. Under 'Other', project leads and partners appear.

⁶⁵⁰ 90% (285) of respondents indicated that the quality of information provided by EACEA had been 'very good' or 'good'. 87% indicated that the quality of information provided by the Creative Europe MEDIA desks had been 'very good' or 'good'. Similarly, amongst respondents who knew of the existence of MEDIA desk at the time of their application to project funding (or before applying), 63% of respondents participated to info days or workshops organised by the CEDs or events featuring their presentations and 37% had not. Amongst those that did, 91.5% (226) of survey respondents rated the quality of these info days, workshops or presentations as 'very good' or 'good'.

3.4.2.3 Governance and monitoring of the programmes

Governance and monitoring structures under the previous programmes were outlined in the founding Decisions. They were underpinned by a strong and regular comitology procedure, albeit resource-intensive.

According to the MEDIA 2007 Decision 1718/2006, *'All actions shall be reviewed on a yearly basis in accordance with the procedure laid down in Article 10(2), allowing the Community to react to the needs and the development of the sector. In order to secure the overall cultural and industrial objectives of the programme the decision on the annual breakdown of the financial envelope should be based on an ongoing monitoring of the effectiveness of the action lines in the programme'*. The decision further specifies that *'The arrangements for monitoring and evaluating actions should include detailed annual reports as well as specific, measurable, achievable, relevant and time-bound objectives and indicators'*⁶⁵¹. The previous Culture Programme includes similar requirements⁶⁵². According to EACEA's 2014 Report on the implementation of the MEDIA Sub-programme, *'the MEDIA 2007 Programme results, as it was subject to Comitology, were presented to the Programme Committee on a Call by Call basis at regular meetings throughout the year. The annual activity report was a short simple summary document supporting the Budget and Work Programme of the following year'*⁶⁵³.

Current programme

Whilst the intention behind integrating the Culture and MEDIA Programme under a single, overarching Programme 'umbrella' had been to create a common approach to supporting cultural and AV sectors, this not yet fully taken place. Each sub-programme still follows its own logic and the cross-sectoral strand had not led to the consolidation of the two sub-programmes⁶⁵⁴.

The division of policy responsibility for the programme, across two DGs, has been a source of fragmentation of the programme since policy priorities and approaches (more or less economically or culturally-centred) stemming from two different DGs were reflected in the steering and implementation of the programme. Practically, it had added an unnecessary layer of governance, e.g. duality of authorisation processes.

The Programme would also benefit from a closer dialogue between lead policy DGs and between the EC and EU Member States. Some interviewees, at Member State and EU levels, indicated that the Programme would benefit from a closer dialogue between lead policy DGs and between the EC and EU Member States. Currently, the bi-annual frequency of the Programme Committee meetings was reported as insufficient compared to the past practice, under comitology, where the dialogue was reportedly stronger and more regular, albeit resource-intensive. In response to this shortcoming, an Open Method of Coordination will be launched in 2017.

Under the MEDIA Sub-programme, implementation reports were produced by the EACEA in 2014 and 2015. They report on the implementation of calls only, and do not cover progress in achieving planned results⁶⁵⁵, when this would be useful to Commission services in their strategic and policy level considerations and in the steering of the Programme. Whilst an annual Culture Programme Activity Report was mentioned in the

⁶⁵¹ Decision No 1718/2006/EC of the European parliament and of the Council of 15 November 2006 concerning the implementation of a programme of support for the European audio-visual sector (MEDIA 2007).

⁶⁵² DECISION No 1855/2006/EC of the European parliament and of the Council of 12 December 2006 establishing the Culture Programme (2007 to 2013)

⁶⁵³ EACEA, 2014 Report on the implementation of the MEDIA Sub-programme, 2015.

⁶⁵⁴ This is supported by the findings from the 2017 CAE report on the first two years of implementation of the CE culture programme which noted that synergies between MEDIA and Culture were not apparent.

⁶⁵⁵ Other data has been aggregated by EACEA but it also focuses on application stages and not on progress on results.

2014 Report on the implementation of the MEDIA Sub-programme, no such report exists to the evaluator's knowledge.

The Regulation establishing the Creative Europe Programme provided a list of indicators to be used for the measurement of the Programme's performance. No systematic reporting from the Commission on the indicators provided in Article 18 of the Regulation has taken place, nor has data been aggregated to assess the Programme's progress in reaching planned results. This is due to the fact that most of the indicators provided under the Regulation have widely been considered as unusable or irrelevant to measure the programme's performance. For example, a number of indicators are contextual indicators, and do not allow for a measurement of the Programme's performance, e.g. the number of admissions for non-national European films in Europe and European films worldwide⁶⁵⁶. Finally, whilst paragraph 29 of the Regulation provides a way to address shortcomings in indicators (it indicates that 'the Commission should adopt additional quantitative and qualitative indicators' and Article 20 allows adopting delegated acts to supplement the qualitative and quantitative indicators mentioned in the Regulation), no additional quantitative and qualitative indicators have been developed yet. This is to be conducted as part of the current evaluation (please see the note on the monitoring framework). Shortcomings in the monitoring of the performance of the Programme also reflect a choice at policy level on focusing efforts in the early stages of Programme implementation on effective and efficient project selection (and less on monitoring and reporting on project results).

Paragraph 28 of the Creative Europe Regulation indicates that the 'Procedures for monitoring and evaluation ought to take into account the work of relevant players such as Eurostat, and the findings of the ESS-net Culture project and of the UNESCO Institute for Statistics [and the work of the EAO]'. The evaluation found that the data from these sources have not so far been used for internal monitoring purposes.

Under the current Programme, performance monitoring indicators included in the Regulation were not reflected in reporting templates (which beneficiaries are required to use when reporting on their projects to the EACEA).

A review of the Programme's performance monitoring framework with a revision of the performance indicators has been provided as part of this evaluation.

3.4.2.4 Reporting stage

Reporting requirements varied across schemes and sub-Programmes yet qualitative evidence collected from the interviews shows that on average organisations devoted more than one month of a full time employee to comply with reporting requirements.

Beneficiaries noted the heaviness of audit and verification processes (and their duplication when co-funding applied). The cost of submitting an external financial audit for larger-scale applications and also to certify final reports (e.g. under Cooperation projects) was also highlighted⁶⁵⁷. This being said reporting arrangements and associated burden have also improved from predecessor programmes to Creative Europe⁶⁵⁸.

In terms of the cost-effectiveness of the data reported, it did not allow, however, a measurement of the programme's progress or performance against its intended outcomes, or by key areas of intervention (distribution, development, promotion/access

⁶⁵⁶ Other shortcomings are as follows: the indicators are a combination of output indicators (e.g. those that refer to number of people reached, number of projects with certain characteristics), and result indicators, (e.g. number of learning experiences and activities supported by the Programme which have improved the competences of professionals). Only a few indicators could be qualified as impact indicators (e.g. the percentage of European audio-visual works in cinemas, etc.).

⁶⁵⁷ Note that the reporting burden on successful applicants could not be appraised either *visa* qualitative methods and or *via* quantitative ones.

⁶⁵⁸ The majority survey respondents agreed that reporting requirements are reasonable given the grant provided.

to markets, mobility, or transversal ones such as employment, mobility, market position of operators).

3.4.3 The cost effectiveness of the programmes was satisfactory and improved from one programming period to another

Measuring the *cost-effectiveness* of actions refers to measuring outcomes against costs associated to them. Costs have been broken down as (1) amounts awarded to beneficiaries, (2) costs associated to managing the programme(s) borne by the EACEA and partners, (3) costs associated with applying to the programme(s) borne by the beneficiaries.

The Creative Europe programme is cost-effective according to stakeholders consulted. They considered that the results of the Creative Europe MEDIA⁶⁵⁹ and Culture⁶⁶⁰ Sub-programmes could not have been achieved using less funding; and that other policy instruments or mechanisms could not have been more cost-effective than the Creative Europe MEDIA⁶⁶¹ and Culture⁶⁶² Sub-programme in addressing the audiovisual sector's needs or the cultural sector's needs respectively.

- Beside stakeholder opinion, the cost-effectiveness of the programme can only be really measured at Scheme level. Tables A3.5 and A3.6 Annex 3 report on key benchmarks by scheme useful to assess the evolution of the cost effectiveness of the programme over the period.

Tables in Annex 3 display the key amounts awarded per year and key results for some of the schemes of the MEDIA and Culture sub-programmes. The main assessment of efficiency of the schemes is summarised in graphical form in Figure 8. The figure compares variations between the two programming periods (e.g. 2007-2013 vs. 2014-2016) in budgeted amounts, average cost of projects, efficiency in generating outputs and efficiency in generating outcomes and impacts.

⁶⁵⁹ 65% of the respondent to the OPC disagreed with the statement that the results of the Creative Europe MEDIA Sub-programme could not have been achieved using less funding.

⁶⁶⁰ 58% of the respondent to the OPC disagreed with the statement that the results of the Creative Europe Culture Sub-programme could not have been achieved using less funding.

⁶⁶¹ 35% of the respondent to the OPC disagreed with the statement that Other policy instruments or mechanisms could have been more cost-effective than the Creative Europe MEDIA Sub-programme in addressing the audiovisual sector's needs and 50% had no opinion.

⁶⁶² 21 % of the respondent to the OPC disagreed with the statement that Other policy instruments or mechanisms could have been more cost-effective than the Creative Europe Culture Sub-programme in addressing the cultural sector's needs and 70% had no opinion.

Interim evaluation of the Creative Europe Programme and ex-post evaluation of the Culture, MEDIA 2007 and MEDIA Mundus programmes

Figure 8. Comparative assessment of the efficiency of the schemes under the predecessor programmes and continued under creative Europe

MEDIA Schemes	Variation in yearly awarded amounts	Variation in average costs per projects	Variation in efficiency in generating outputs	Variation in efficiency in generating outcomes and impacts	Comparative efficiency assessment
Cinema networks, Cinema networks countries outside MEDIA	-0%	-1%	+	?	+
Distribution automatic / Distribution automatic reinvestment	-2%	-22%	+	+	+
Distribution - cinema selective / Distribution selective	-18%	+6%	~	~	~
TV Broadcasting / TV Programming	+15%	+38%	-	~	~
Development - single projects	-20%	+2%	-	~	~
Development - slate funding	+20%	+12%	+	+	+
VOD / DCD / online distribution	+4%	-19%	+	+	+
Continuous training	-4%	-1%	~	?	~
<hr/>					
Culture Schemes					
Cooperation projects	+5%	+67%	~	+	~
Networks (incl. advocacy)	+227%	+327%	-	?	-
Literary Translation	+58%	+124%	~	+	~

Key: - "lower costs" + "improvement in efficiency" + "higher costs" + "decrease in efficiency" ~ "mixed" ? "uncertain" / unknown

On the basis of the information available, the efficiency of the following scheme appears to have improved (i.e. the increase in the level of outcomes is made at the same or lower cost per action):

- Distribution Automatic;
- VOD / Online distribution;
- Cinema networks; and
- Development - Slate Funding scheme.

The level of efficiency of the following schemes have appeared to remain the same (i.e. variation in the level of outcomes is commensurate with the variation of the cost per action):

- TV Broadcasting / TV Programming scheme;
- Cooperation Projects;
- Distribution - Cinema Selective;
- Development - Single Projects scheme; and
- Literary Translation scheme.

The level efficiency of the following schemes may have deteriorated:

- Continuous training.

The level of efficiency of the following schemes could not be ascertained:

- European Networks.

The efficiency of schemes under Creative Europe were on the whole higher than under predecessor programmes. The increase in the cost per projects was usually compensated either by a higher level of outputs and or contributions to higher levels of outcomes and or impacts. Illustrative examples of higher levels of efficiency are reported thereafter:

- the MEDIA Distribution Automatic and Distribution - Cinema Selective were found to be good value for money, delivering achievements and outputs that are important and visible at both European and local levels⁶⁶³;
- The cost-effectiveness of the European support provided under the VOD / Online distribution scheme appears satisfying (1 euro of support would generate 7 euro of private revenue in 2016) and has improved since 2014 (where 1 euro of support would generate 5 euro of private revenue).⁶⁶⁴
- Platforms were perceived as cost-effective, especially in being relatively direct ways of reaching artists⁶⁶⁵. Platforms spent around €38 per person reached, through a variety of means including festivals, fairs and artist presentations.
- Current projects supported under the Literary translation scheme delivered more translations than those supported under the predecessor programme: projects supported by the predecessor Culture programme delivered on average 5.9 translations per project (based on programme data)

The CCS GF with EUR 121 million of financial guarantees is expected to cover an estimated total amount of EUR 650 million in loans from financial intermediaries to CCS entities. The expected leverage effect thus achieved would be that €1 in financial guarantees leads to more than €5 of loans accessible to CCS entities.

3.5 Sustainability

Sustainability assesses the extent to which projects, networks and initiatives supported by Creative Europe and its predecessor programmes have been continued

⁶⁶³ Based on 16 interviews with beneficiaries and lead contacts at EACEA

⁶⁶⁴ EACEA document, Conclusions of the Evaluation Committee for the renewal of FPA, year 3.

⁶⁶⁵ Based on three interviews with beneficiaries and two with stakeholders

in some form, as well as the sustainability of the effects of their activities. In particular, the sustainability questions examine:

- The sustainability of certain activities or elements of the programme and its predecessor programmes, also in case EU support is diminished or discontinued;
- The extent to which central and decentralised communication and valorisation activities contribute to the use of programme results and their dissemination to the wider interested public; and
- The extent to which programme results have been used to their full potential in maximising the visibility, accessibility and awareness of the programme and predecessor programmes, programme and policy development.

3.5.1 The main sustained impact is found in the networks and partnerships developed

The sustainability of the results lies primarily in the continuation of partnerships that were started under Creative Europe and the predecessor programmes. Under MEDIA, sustainability is also found in the intention and capability of organisations to continue cross-EU filmmaking, i.e. a sustained interest in producing or distributing works with a European dimension.

Under both MEDIA and Culture, collaboration between project partners is continued in some form beyond the projects' lifecycle.⁶⁶⁶ There is no significant difference in these results between the predecessor programmes and Creative Europe.

However, compared to Culture, MEDIA projects did not as frequently lead to continued collaboration between partners or to other forms of follow up.⁶⁶⁷ This difference can in part be explained by the specific nature of some MEDIA schemes, such as Distribution Automatic and Distribution Selective, which focus less on developing cooperation between project partners, and more on the delivery of a specific project. In addition, partnerships for TV Programming were in large part already well-established before applying, and so there was little change to them because of the funded activity.

3.5.1.1 Across MEDIA schemes, there is a sustained impact on organisations' motivation and capacity to operate with a European dimension

MEDIA has supported beneficiaries to develop and sustain an interest in producing or distributing content that reflects the European market in their content or distribution / promotion strategies and which is not exclusively orientated towards national or English speaking markets. First, the schemes allow beneficiaries to develop a more diverse commercial portfolio by mitigating the financial risks associated with doing so. For example, for independent distributors, the Distribution schemes contribute indirectly to the financial stability of organisations, allowing them to compete in a market that is increasingly dominated by global conglomerates and US releases. The schemes allow distributors to develop an extended catalogue of highly diverse films and, ultimately, to offer a larger range of titles and genres for exhibitors and audiences.⁶⁶⁸ Second, the schemes also allow some companies to develop a business model that focuses (at least in part) on this European dimension. This impact is detailed in Section 3.6.3.1. Third, new or strengthened partnerships were evident across most MEDIA schemes.⁶⁶⁹ Companies that had benefited used these

⁶⁶⁶ Beneficiaries indicate that their project and/or collaboration with their partners usually continued after project completion: three quarters (75 per cent) of survey respondents. Beneficiaries implementing ongoing projects and literary translations projects were not asked this question.

⁶⁶⁷ 65 per cent of MEDIA respondents reported that their project and/or collaboration continued in some form while 83 per cent of Culture respondents did

⁶⁶⁸ See FE1: Distribution Schemes

⁶⁶⁹ For example, the evidence collected during FE2 on MEDIA Development schemes shows that the Single Projects scheme led to the projects' cooperation with ca. 3,250 partners

partnerships to develop similar projects or to apply for further funding. Overall, beneficiaries emphasised that this easy access to trusted partners reduces the cost (both in terms of time and risks) of transnational activities over time.

3.5.1.2 Across Culture sub-programme schemes, the sustained impact is found in partnerships and in the exchange of learning that is facilitated by the projects

Across all Culture schemes, beneficiaries developed stronger relationships with project partners and learnt from their respective experiences. For example, of Cooperation Project beneficiaries under the predecessor Culture programme, 82 per cent reported that they had some follow up or continued relationship with the project partners after their project completion.⁶⁷⁰

They also gained greater awareness of their sector at an international level. Reported sustainable benefits relates to professionalisation, skills development, and building capacity which were often developed thanks to the international dimension of the projects.⁶⁷¹ Evidence of these benefits has been found across the schemes studied under the Focused Evaluations. For example, a Network project used the funding to help pool international knowledge and develop a coordinated and centralised approach to data collection. They then ran national-level meetings for members to share what was learnt with their national sectors.

3.5.2 Improving the dissemination of results will support the sustainability of impacts⁶⁷²

For some schemes (notably Cooperation Projects, Networks and Platforms), dissemination is an important mechanism for achieving the desired wider effects on the sectors, in helping to share what is learnt at an international level. Beneficiaries of these schemes are overwhelmingly positive about the impact of their dissemination activities, although these generally appear to be relatively passive forms of communication, such as websites or social media.⁶⁷³ Given the importance of dissemination, however, partners could have placed more focus on engaging with on their national audiences, and also have made more use of the CEDs as a mechanism for further sharing of results.⁶⁷⁴

Programme-level dissemination events have to date focused on either Culture or MEDIA, rather than integrating the two strands. For Culture, the project showcase conference which used to be held annually under Culture has now been restarted under Creative Europe.⁶⁷⁵ The conference mainly showcases beneficiaries of the Culture sub-programme, and there may be scope to enhance the synergies between the programmes by having shared conferences or networking events which address cross-sectoral issues.

There is also potential for greater exploitation of programme outputs, especially through the CED.⁶⁷⁶ Some of the schemes, notably Development, Single & Slate, and

⁶⁷⁰ 87 per cent under Creative Europe.

⁶⁷¹ As evidenced by survey findings and beneficiary interviews. For Cooperation Projects, 90 per cent of Culture programme respondents and 75 per cent of Creative Europe respondents found it effective or very effective in 'developing skills and competences'. Beneficiary interviewees stated that the transnational component was crucial in achieving this.

⁶⁷² This section addresses the evaluation question: 74. To what extent have the results of the programme and predecessor programmes' finalised actions been properly disseminated to stakeholders and the public?

⁶⁷³ The Interim Evaluation of the Culture Programme 2007-2013 states: "*In terms of the sustainability of the effects of the Culture Programme, the evidence suggests that project results concerning experiential learning are being disseminated mostly to cultural operators involved in the project partnerships, whereas dissemination to "external" audiences is largely via passive media channels such as websites.*"

⁶⁷⁴ As evidenced in stakeholder and beneficiary interviews.

⁶⁷⁵ Creative Europe Showcase conference was held on 27 November 2017. There had been a gap since Creative Europe began it was last held to allow projects to realise some results from their work, and which could therefore be showcased.

⁶⁷⁶ This question addresses evaluation question: 75. What is the exploitable potential of the programme and predecessor programmes' results, and to what extent can one say that this potential has been fully exploited?

Literary Translation, result in a range of works which contribute to a portfolio of content which has a European dimension. Other schemes, such as Cooperation Projects, also produce content (e.g. tools, models) which could be further exploited. However, at present only around a third of survey respondents consider their outputs 'fully exploited'. The CEDs could support awareness raising of these outputs both within the sector and to a wider public, by promoting the programme's contribution to these works.

3.6 EU Added Value

European added value is the value resulting from an EU intervention which is additional to the value that would have been created by Member States' acting alone. Therefore, in assessing the EU-added value, particular attention has been given to the following:

- Value resulting from the Creative Europe programme interventions that is additional to the value that would have resulted from interventions initiated at national or institutional level or to other aspects of the development of the AV and CCS and their operators;
- Added value of the programme in promoting access to diverse cultural content and in supporting a European dimension of projects.

3.6.1 Most supported activities would not have happened without the EU funding⁶⁷⁷

Most *supported* activities would have been significantly reduced in scope or would not have happened without the funding provided by Creative Europe and the predecessor programmes (i.e. in the counterfactual scenario).⁶⁷⁸ The specific significance of the funding in the supported activities differs widely by programme and by scheme.⁶⁷⁹

For MEDIA, most supported activities are typically part of a wider process of developing and distributing content, e.g. the Cinema Automatic scheme may support the transnational marketing costs of an existing distribution campaign.⁶⁸⁰ The funding therefore contributes to one or a few specific activities in the process. These activities would have been implemented in some form anyway, but to a more limited extent in terms of geographic coverage, audiences reached, or number of partners. For example, under Cinema Automatic the beneficiary may still invest in distribution without the funding, just not in transnational distribution. For Cinema Automatic, estimates of the number of activities that would have been lost without the funding (the counterfactual scenario) are presented below in Table 21. These estimates suggest that over half of the supported companies would have invested less in European non-national films without the funding, based on the survey responses and programme data.

⁶⁷⁷ This section addresses the evaluation question: 73. Which of the current activities or elements of the programme would be likely to continue and in which form if EU support was withdrawn or substantially decreased?

⁶⁷⁸ By supported activities, the analysis below refers to the part of the project development / distribution cycle that is funded, rather than the overall project.

⁶⁷⁹ Based on counterfactual analysis presented in all six Focused Evaluations.

⁶⁸⁰ Prints and Advertising (P&A) is supported under Cinema Automatic

Table 21. Cinema Automatic: Estimated change to organisations' activities without funding (for combined programming period)⁶⁸¹

	Cinema Automatic
Total number of funded companies	433
Result of loss of funding (number of companies):	
No difference to their activities	22
Change to type of released film, (type of) released films, scale of promotion, and/or expected audiences reached	134
Less invested in European non-national films	225
Would not have engaged in the distribution of films	43

For Culture, the activities funded are less closely embedded in existing processes, although they can generally be closely aligned with the general activities of the organisation.⁶⁸² For example, a Cooperation Project produced a new model for skills development in orchestras based on transnational learning that, while building on the existing activities of participating organisations, was a standalone initiative. This type of activity is very unlikely to have taken place without the EU funding. For Cooperation Projects, estimates of the change in organisations' reported activities without the funding are presented in Table 22 below. These estimates suggest that the largest share of organisations would have implemented a significantly reduced number of activities, on average 35 per cent under Culture and 38 per cent under Creative Europe.

Table 22. Cooperation Projects: Estimated change to organisations' activities without funding⁶⁸³

	Culture 2007	Creative Europe
Total number of funded organisations	4,162	1,302
Result of loss of funding (number of organisations):		
No difference	125	26
Reduced number of activities (on average to 35 / 38 per cent of what would have happened)	1,956	885
None of the activities would have happened	2,081	391

⁶⁸¹ Based on survey findings for Creative Europe respondents only and extrapolated to both programming periods. As such, these estimates are limited by the survey approach e.g. whether the sample of respondents represents programme beneficiaries accurately. Of respondents under Creative Europe, when asked: *If your organisation had not received subsidies from the Programme, what do you think would have happened?* 52 per cent would have invested less in European non-national films; 33 per cent it would have made a difference to our (type of) released films, scale of promotion, and/or expected audiences reached; 10 per cent would not have engaged in the distribution of films; 5 per cent stated it would not have made any difference to our (type of) released films, scale of promotion, and/or audiences reached; 5 per cent 'other'. For Cinema Selective, the equivalent figures are: 35 per cent; 35 per cent; 22 per cent.

⁶⁸² Notable exceptions are the Literary Translation Scheme and the Networks Scheme under Culture, which funded existing activities.

⁶⁸³ Based on survey findings and extrapolated using project database. Note previous caveats as above. Responses: 3 / 2 per cent; 47 / 68 per cent; 50 / 30 per cent.

3.6.1.1 Under MEDIA, the funding contributed to a greater number of non-national films being distributed, to increased investment, and to a higher quality output

The counterfactual scenario differs across MEDIA schemes, but with each scheme there was a reduction in activity and so a likely reduction in the impact of the activity.

Cinema Automatic led to a higher number of European non-national films being distributed, as according to around half of the scheme's beneficiaries, they would not have been able to invest in these films to the same extent without the financial support.⁶⁸⁴ Similarly, **Cinema Selective** beneficiaries would also have invested less in European non-national films, and would have changed the (type of) released films and the scale of their promotion; thus also affecting the expected audiences to be reached. Supported projects under both schemes receive admissions that are 32 per cent higher than projects that were not supported, but which were of a similar quality.⁶⁸⁵

For **Single Projects and Slate**, funding meant that films were more likely to be produced and released as part of funded projects than when applications were not successful. The funding also allowed for more time to be spent on the development phase, which improves the quality of the film, and presumably the likelihood of commercial success. Supported projects also have a greater international dimension: they are produced in more languages, and more international co-producers participate.⁶⁸⁶

For **TV Programming**, the support allowed for greater investment in production and hence a higher quality output, for example because a more expensive location can be used, or better costumes produced. Again, supported projects had a greater international dimension, which was lost if national financing or private finance was used to deliver the project.⁶⁸⁷

3.6.1.2 Under the Culture sub-programme, without the funding the activities would largely not have happened, across most schemes

Across most schemes under Culture, the supported activities are unlikely to have been implemented or would have been significantly reduced in scope without the funding.

Only a minority of **Cooperation Projects** are likely to have happened *without* the funding received through the scheme, and if they were delivered it would be with significantly reduced scope or different focus.⁶⁸⁸ This equates to a significant reduction in *activities*: based on the analysis presented above, it equates to a loss of around 162,000 transnational activities under Culture 2007 and over 31,000 under Creative Europe to date (as set out in Table 23).⁶⁸⁹

⁶⁸⁴ Detailed analysis in Focused Evaluation 1: Distribution Schemes. For Cinema Automatic beneficiaries, when asked what would have happened if their organisation had not received funding from the Programme, 52 per cent reported that they would have invested less in European non-national films. Beneficiaries of the Cinema Selective Scheme were less likely to say that they would have invested less in European non-national films (35 per cent) but more likely to say that it would have made a difference to the (type of) released films, scale of promotion, or expected audiences reached (35 per cent)

⁶⁸⁵ The Online Scheme is also assessed under this FE but due to the small size of the scheme to date, there is only limited evidence of the counterfactual case. Indicative evidence suggests that largely, without the funding the activities would either not have taken place or been significantly reduced in scope.

⁶⁸⁶ Based on analysis of counterfactual case studies presented in Focused Evaluation 2: Single & Slate

⁶⁸⁷ Based on analysis of counterfactual case studies presented in Focused Evaluation 3: TV Programming

⁶⁸⁸ Counterfactual interviewees outlined in Focused Evaluation 4 were unable to secure alternative funding for their projects. Under Creative Europe: over 30 per cent of respondents indicated that they would not have implemented any of the project activities if they had not been successful.

⁶⁸⁹ Transnational activities has been selected as an illustrative and quantifiable output indicator.

Table 23. Transnational Activities: Estimated reduction in number of Transnational Activities without programme support⁶⁹⁰

	Culture 2007	Creative Europe
Average number of transnational activities per project	256	206
Estimated total transnational activities (average x total no of projects)	201,216	43,466
Estimated transnational activities which would occur without funding (based on reported proportion that would happen)	39,137	12,101
'Lost' transnational activities, i.e. that would not have happened without the funding	162,079	31,365

Similarly, most **Network** project activities would not have taken place without support from the scheme.⁶⁹¹ Alternatively, activities would be of a much smaller scale or depth, e.g. hosting a smaller seminar; engagement with fewer partners; a website and online communications, rather than face to face interaction.⁶⁹² As Network organisations are often highly reliant on the funding, the focused evaluation on Networks stated that "without the funding, many organisations will scale down activities or close [...]".

Most activities of **Platform** projects are highly unlikely to have been implemented without support. If any activity would take place without funding, this would happen on a significantly smaller scale and with a much more limited reach. Unsupported projects that are delivered often lack transnational partners, as they use national funding, which does not place much emphasis on the international dimension of activities (or cover international activity at all). Some of the specific features of the scheme, such as the emphasis in the scheme on the development of a European Quality Label and the focus on emerging talent would almost certainly be lost.⁶⁹³

For **Literary Translation**, the difference between supported and unsupported projects is less significant. Without the funding, publishers are likely to translate around two-thirds of the books that they would have translated with EU funding but these works would have been translated to a less diverse range of languages; the scheme therefore supports the objective of cultural diversity.

3.6.2 The main EU added value comes from the transnational character of the programmes⁶⁹⁴

The main added value of Creative Europe and its predecessors comes from the strong international dimension of the programme. As set out in Section 3.2.2.7, there are few international funds that support transnational cooperation and those that do are of

⁶⁹⁰ Based on survey findings and extrapolated using project database. Transnational activities include *individual* transnational activities e.g. an artist attending a conference in a non-national EU country, as reported in project final reports. Analysis does not account for differences between individual actions as sample sizes are too low. Analysis based on counterfactual percentage responses mentioned earlier in the section.

⁶⁹¹ Around one-third of survey respondents under the predecessor Culture Programme, and 40 per cent of those under Creative Europe, would not have implemented any of the project activities without the funding. Of those that indicated some activities would take place, the average proportion that they anticipate would be undertaken is 50 per cent (under the predecessor Culture Programme) and 34 per cent (under Creative Europe).

⁶⁹² Note there are significant differences between the Network scheme under the Culture sub-programme and under Creative Europe, with the main change being from operating grants (which funded the core costs of a network) to activity grants (which funded distinct activities of the network).

⁶⁹³ Based on counterfactual analysis set out in Focused Evaluation 5. Of the projects that indicated some of the activities would have happened without the Creative Europe funding, the average amount of activity was 37 per cent.

⁶⁹⁴ This section addresses evaluation questions: 73. What is the additional value and benefit resulting from the Creative Europe programme and its predecessors, compared to what could be achieved by MS at national and/or regional levels?; and 74. What does the Creative Europe programme offer in addition to other culture and audio-visual support schemes available at both international and national levels?

significantly smaller scale. Projects and activities undertaken without Creative Europe support would therefore have been of a reduced size and scope and of a largely national focus, if they were delivered at all. This was confirmed by all primary data sources and by all the FEs for both MEDIA and culture schemes.

3.6.2.1 Transnational networks and partnerships are a key area of added value

The creation of international networks and cross-border partnerships provides the main and most durable elements of added value to Creative Europe. These are either generated specifically and purposefully as part of a project, or developed as the indirect result of activities such as training. These networks and partnerships are at the core of the beneficial effects of the programme, in allowing participants to understand and learn from each other.⁶⁹⁵

Some partnerships, created at application stage, were even maintained despite the project not having been awarded funding.⁶⁹⁶ Established networks and partnerships furthermore facilitate subsequent transnational operation, as they reduce the costs of identifying, contacting and vetting partners. Strong partnerships also underpin activities that support learning from each other and, in doing so, are building capacity.

3.6.2.2 Transnational networks offer particular added value for CCS operators working in niche fields and in Member States where capabilities are less developed

Of all stakeholders implementing Creative Europe, the transnational dimension adds particular value to cultural operators that work in niche fields, as these often have fewer comparable organisations to work with in their own countries. For example, one Platform project supported organisations working in a niche area of public art. Many of the members of the Platforms did not have any other organisations working in this field in their own Member States (especially when they are smaller), and so Creative Europe provided a unique and important opportunity for them to learn from other organisations working or willing to engage in the same niche field.

Creative Europe also brings significant added value when organisations have particular expertise to share with others. Stakeholders and beneficiaries interviewed suggest that this can lead to transnational partnerships between actors in Member States where certain capabilities are generally less developed. For example, in the case of Culture, the sub-programme's focus on audience development was of greater benefit in Member States where this is a less established capability (as in some Eastern European states) compared to those where this is a more established capability (as in the Netherlands or the UK where there has been significant national funding to support its development). Hence, organisations were able to learn from more experienced partners.

3.6.2.3 The programme supports organisations in taking (calculated) risks, which allows them to focus on operating with a European dimension

Investments in the development, production or distribution of cultural products with a European dimension come with a degree of risk that, without EU support, CCS operators would not be able to take.⁶⁹⁷ Stakeholders and beneficiaries view the funding as supporting the 'high-risk' phases of a project. For example, TV productions with a European dimension might have been of lower quality with companies reluctant to invest a sufficient sum of money. Many films would also not have been distributed outside their home countries, as companies would have considered them too high a

⁶⁹⁵ Interviews: Total: 38. CCS representative organisations: 7; CED: 11; EU level CCS organisations: 13; National policy makers: 3; European Commission and Agency: 4.

⁶⁹⁶ As evidenced by counterfactual interviews for Cooperation Projects and Platforms.

⁶⁹⁷ This risk can be a result of, for example, the lack of market intelligence or the small size of the available market. Idea Consulting (2013). *Survey on Access to Finance for the Cultural and Creative Sectors*

risk. Publishers would not include certain works in their publishing strategy, translate a smaller number of works and promote them less.

3.6.2.4 Creative Europe supports beneficiaries to access other funding

Creative Europe support is often regarded as a kind of 'quality label', increasing interest and trust in supported projects and acting as potential leverage for additional funding, as confirmed by interviews with beneficiaries and stakeholders. EU support often enhances the beneficiary organisations' reputation and is therefore helpful in securing resources for other projects, or in the subsequent phases of the same project (as is the case in development projects financed under the MEDIA sub-programme). For example, participation in EU funded activities is viewed as demonstrating the capability of cultural organisations to deliver international projects, turning these organisations into more reliable and attractive partners for new projects.⁶⁹⁸

3.6.3 Over time, the funding has supported organisations to scale up their work with a European dimension⁶⁹⁹

A key achievement of both the MEDIA and Culture programmes has been the creation of long-lasting international partnerships and collaborations, which were successful in securing repeat funding. Particularly under MEDIA, this has enabled these organisations to scale their activities and to operate with a European / transnational business model, or other European dimension, which capitalises on this cooperation.⁷⁰⁰ The evidence for this form of value-added is set out below.

3.6.3.1 Continued or repeat funding allows organisations to scale up, although it may limit access to the funds for others

Repeat, sustained funding has allowed some organisations participating in Creative Europe to engage in initiatives of a larger scale and horizon than they would have achieved otherwise, and to deepen their cooperation with international partners. This may be because of the sequence of funding, these organisations acquire stronger market position, creating more stable partnerships, or because they developed important new skills and capabilities through engagement with their peers that allowed them to engage in international projects and form new partnerships.⁷⁰¹

The repeat and sustained funding is reflected in the programme data. For MEDIA, across both programming periods, a relatively small number of core beneficiaries received most of the funded projects (by number) as set out in Table 24. This is most striking for Cinema Automatic, where 20 per cent of beneficiaries who receive funding most often are responsible for 82 per cent of supported projects. Under Cinema Selective, the figure is 72 per cent. It is lower for the Development Schemes (45 per cent).

⁶⁹⁸ This leverage effect was not recognised by beneficiaries of the TV programming scheme, which is mostly likely because this scheme requires applicants to have already developed and secured their financial strategy.

⁶⁹⁹ This section addresses the evaluation questions: 73. To what extent does the Creative Europe programme, for example, promote transnational cooperation, generate economies of scale and critical mass, create a leverage effect for additional funds, and ensure a more level playing field in the European creative and cultural sectors?; and 74. What is the cumulative added value of repetitive actions/activities of the Creative Europe programme and its predecessor programmes over time?

⁷⁰⁰ Half of the surveys' respondents indicated that 'Their project led to new international and transnational cooperation initiatives' (50%, n=259) and three quarters (82%, n=423) that 'They have continued collaboration with their project partners'. Evidence of scaling is found in the beneficiary and stakeholder interviews set out in FE1: Distribution Schemes and FE3: TV Programming.

⁷⁰¹ This was confirmed across FEs and in interviews with sector stakeholders, EU level CCS organisations, and national policy makers

Table 24. Repeat beneficiaries by selected MEDIA scheme (across both programming periods)⁷⁰²

	Cinema Automatic	Cinema Selective	Single & TV Slate	TV Programming
Total funded projects	7,655	4,209	2,781	628
Funded companies	433	518	1885	395
Average number of projects per company	18	8	1.48	1.59
Highest number of projects per company	244	116	40	18
Share of total projects awarded to the 20 per cent of most frequently funded companies (Pareto Analysis)	82%	70%	45%	57%

The implications of this concentration of projects with a small number of beneficiaries are both positive and negative. While it means that a small number of organisations receive a significant share of the programme funding, it also highlights that the programme design enables repeat funding which is allowing organisations to use the funding to scale up or to develop sustained networks or organisational capacity.⁷⁰³ For example, under the TV Programming scheme, companies increased their production capacity and could take part in more ambitious projects. Of those that applied for funding a second time, 64 per cent looked to increase the amount awarded, suggesting they had begun to scale up their activities.⁷⁰⁴

There is evidence of a similar effect for repeat beneficiaries across all MEDIA schemes which have been the subject of the Focused Evaluations.⁷⁰⁵ The Development Single scheme is used as a stepping stone for building company capacity to successfully compete for support under Development Slate; and Slate Funding for further developing international (co-) productions with non-European countries.⁷⁰⁶ The impact was smaller in magnitude for the actions funded under TV production support schemes. These mostly allowed the project beneficiaries to improve on the scale and quality of the developed AV works. For the Distribution schemes, the programme's repeat support is crucial in expanding the scale of distribution, and enabling the distributors to develop business models which include the distribution of non-national films in European cinemas.

The Focused Evaluations suggest that this effect contributed to the sustainability of the wider CCS ecosystem, by supplementing private investment and commercial returns to create a mixed-economy model. This support is important for strengthening the resilience of individual companies and the wider sector. For example, the Distribution Schemes Focused Evaluation suggested that one of the main achievements of the programme is a solid distribution network for European films in the EU Member States.

However, the schemes are highly competitive, and prior experience is an important advantage in securing the funding (in part because of the intricacies of the application process). There is therefore some degree of trade-off between sustaining the growth

⁷⁰² Analysis is based on MEDIA project database. Where possible, changes to company names have been addressed in the data. Some companies may have changed names and benefited more than twice.

⁷⁰³ See FE1: Distribution Schemes; FE2: Development Schemes; FE3: TV Programming.

⁷⁰⁴ ICF (2017) FE3: TV programming scheme

⁷⁰⁵ Including Single Project and Slate; TV Programming; Cinema Automatic and Cinema Selective; Networks and Platforms; Cooperation Projects; and Literary Translation.

⁷⁰⁶ As confirmed by beneficiary and stakeholder interviews, as well as the MEDIA survey results.

of a relatively small group of organisations (and their wider sector) who derive most benefit from the schemes, and allowing a wider group of new applicants to benefit from the programme.

For Cooperation Projects and Literary Translation supported under Culture, the support is less focused on a small proportion of beneficiaries than under MEDIA, as shown in Table 25. The relatively low average number of projects per beneficiary however suggests comparative openness to new entrants.⁷⁰⁷

Table 25. Estimated repeat beneficiaries by selected Culture scheme (across both programming periods)⁷⁰⁸

	Cooperation Projects	Literary Translation
Funded companies	4546	540
Average number of projects per beneficiary organisation	1.20	1.54
Highest number of projects per beneficiary organisation	15	8
Share of total projects awarded to the 20 per cent of most frequently funded companies (Pareto Analysis)	33%	40%

3.6.3.2 There is some evidence of structuring effects over time, although the fragmented sector makes this hard to achieve

The 'structuring effect' is understood to be the consolidation or strengthening of cultural operators in a certain sub-sector. This is achieved by strengthening the competitiveness of these operators through knowledge-sharing (e.g. about new business models and innovative practices), as well as through cross-border dialogue between operators in a sub-sector. Having a 'structuring effect' is an explicit aim of both the Networks scheme and the Platforms scheme, and an implicit desired effect of other schemes.

For MEDIA, there is evidence of this structuring effect across those schemes which have a focus on transnational partnerships. For example, the TV Programming Focused Evaluation sets out a clear peer learning effect around how other countries have used the scheme to learn from the recent success of Nordic countries' productions. For the Distribution schemes, beneficiaries saw one of the main benefits of the funding as bringing professionals together and collectively supporting their capacity to collaborate and operate transnationally. Both examples illustrate a strengthening of a sector through knowledge-sharing.

For the Culture sub-programme, there is evidence of a structuring effect across Networks, Platforms, and Cooperation Projects.⁷⁰⁹ Network projects were able to take best practice and support members and the wider sector to implement it in their own operations. Examples included the use of knowledge exchange activities amongst cultural policy experts to share new approaches to the use of data or approaches to governance, in supporting the adoption of new models of delivery, or in raising the profile of the cultural heritage sector with policymakers. For Platforms, this consisted primarily of consolidation within a sector as, for example, organisations were able to focus on issues of particularly relevance to architecture, or to develop a shared identity and profile as organisations that work in public art. The focus of the Platforms scheme on a single project per sub-sector has contributed to this impact. Cooperation

⁷⁰⁷ The beneficiaries of culture schemes are less likely to be competing with the dominant conglomerates who are influencing the Media landscape, as set out in 1.2.2.

⁷⁰⁸ Analysis is based on Culture project database. Where possible, changes to organisation names have been addressed in the data. Some organisations may have changed names and benefited more than twice. Networks are excluded as they have specific and distinct role; Platforms as a relatively new scheme.

⁷⁰⁹ See Focused Evaluation 5: Networks & Platforms; Focused Evaluation 4: Cooperation Projects

Project beneficiaries were supported to develop an international profile and to operate in non-national contexts. The intensity and reach of this structuring effect clearly differs across the schemes (with evidence strongest around Networks and Platforms). For some projects the level of funding and the scale and focus of projects are overall considered by beneficiaries and stakeholders to be too limited for the structuring effect to happen i.e. smaller projects appear less likely to result in a structuring effect, although the size of the project may be mitigated by the small size of the sector in which they are operating. Examples of the structuring effect are set out in Table 26.

Table 26. Examples of the structuring effect by scheme⁷¹⁰

Scheme	Illustration of structuring effect
Cooperation Projects	A literature-focused project developed new approaches to audience development e.g. blindfolding audience members and reading a text to them to allow them to appreciate it, which were then used and shared by project participants.
Networks	A music network's project used a programme of conferences and workshops to share approaches to issues including gender balance. Network members from countries where practice is less established in this area were able to take these approaches to their national members.
Platforms	An architecture-focused Platform provides a forum for debate by members and runs an annual open call for themes for discussion. This allows participants to adjust to the rapid changes in the architecture sector.

4 Recommendations

4.1 Relevance

Prioritise the development of transmedia projects to ensure continued relevance of the audiovisual offer in light of changing consumption patterns

- Clarify eligibility criteria for supporting transmedia projects across the MEDIA Sub-programme schemes.
- Monitor the influence of (S)VOD players in the audiovisual value chain and adapt strategic intent of the schemes accordingly.

Adjust level playing field provisions to make them more relevant to audiovisual market dynamics

- Consider extending LPF provisions to factor in such variables as the availability of public subsidies in the Member States and company size.
- Ensure that LPF provisions do not only apply to applicants from low-medium PCCs but also to partnerships led by high PCCs that involve low-medium PCCs.
- Assess whether separate schemes or actions for low-medium PCCs could also incentivise operators from those countries without generating adverse effects for smaller operators in high PCCs.

Extend the scope of support for the European video games industry

- Ensure that the budget of the Video games development scheme is adequate to the size and market value of the European video games industry.
- Loosen the eligibility criteria to support a diversity of innovative games or genres with a high growth potential.

Ensure that the Culture sub-programme is relevant to the development needs of cultural and audiovisual operators

⁷¹⁰ Drawn from beneficiary interviews.

- Assess whether small operators have access to financial support that matches their ambition to grow outside their national markets.
- Reconsider whether the distinction between small and large cooperation projects is relevant for the development and growth of cultural operators.

Provide more flexible support to cultural operators to respond to change

- Enable European Networks beneficiaries to modify aspects of their project activities in response to new technological or market trends.
- Ensure continued thematic relevance for Cooperation Projects by enabling beneficiaries to more easily change or modify their activities.

Ensure that the Literary Translation scheme supports linguistic diversity

- Further encourage the translation of literature works from the smaller countries into English, French, German and Spanish,
- Consider better recognition of smaller genres like children books, plays, poetry.

Make better use of the Cross-sectoral Strand

- Increase collaboration and synergies between EAC and CONNECT in implementing cross-sectoral projects and actions.
- Review how the models of the Refugee Integration Projects and the Master Degrees in Arts and Sciences could be adapted for future cross-sectoral work and for similar future calls.

4.2 Coherence

Maximise the mutual information about policy agendas

- Promote knowledge about the European Agenda for Culture among CONNECT staff and about DSMS among EAC staff.

Develop a more coherent response across the MEDIA Sub-programme to changing technologies and business models in the audiovisual sector

- Increase consultation with digital and ICT sector experts in stakeholder meetings to stay ahead of changing technologies and business models and ensure a coherent response across the MEDIA Sub-programme, retaining a focus on where it can add the greatest value.
- Assess how digital technologies are integrated across the traditional audiovisual value chain and whether this requires a more flexible approach to funding.
- Increase the budget and raise the profile of Online Distribution Action 3: Support to Innovative Distribution Strategies to encourage further collaboration between traditional cinema distributors and specialist online distributors, with the aim of facilitating understanding of new technologies and supporting new business models.
- Consider the extension of provision of support to aggregators to package European films for the major VOD platforms, to ensure they are represented on these platforms and that the rapidly changing film value chain is covered.

Ensure there is sufficient awareness of and clarity around complementary opportunities within the sub-programmes and other EU funding sources

- Consider how to increase audiovisual organisations' awareness of generic business and economic support available through other EU funding programmes.

- Consider how to increase CCS organisations' awareness of other EU funding for culture in different contexts (e.g. education, training, research, and infrastructure).

Ensure coherence with international and national funding sources

- Promote more information of sector bodies from Member States to facilitate alignment with Creative Europe.
- Share annual work programmes with international organisations funding the sector in Europe to maintain their respective added value and or strengthen their complementarity.
- Continue efforts to make more systematic use of EAO research to inform strategy, planning, and decision-making, and ensure this underpins any changes made to the schemes as they evolve.

4.3 Effectiveness

Enhance the design of the current Creative Europe Programme

- At policy level, retain the balanced approach in pursuing general diversity and competitiveness objectives of the Programme, giving equal weight to the cultural, social and economic objectives of the programme.
- Ensure optimal performance of Creative Europe against the Programme's general and specific objectives by better linking particular schemes with one "dominant" objective.

Increase the mainstreaming of the sectors' strategies across the whole of the Creative Europe Programme

- Ensure that sectors' strategies, i.e. the European Agenda for Culture and the DSMS, are 'mainstreamed' across the Programme as a whole, to promote an integrated approach to their implementation with the Programme as a whole and for all CCS.

Strengthening the focus on audiences

- Consider expanding the 'audience development' focus of the Programme not only in terms of stimulating demand, but also focusing the support where the demand for non-national creative and cultural works already exists.
- Continue to increase spending on promotional activities, especially towards existing and potential new audiences.

Consider ways to improve the impact of the Cross-sectoral Strand

- Reach cruising speed in the implementation of the CCS Guarantee Facility and ensure geographically balanced coverage of loans under guarantees and good sub-sector coverage by 2020.
- Conduct a review of the implementation of the Cross-sectoral Strand once a greater proportion of activities have been completed.
- Consider the increase of the number of truly cross-sectoral projects.

Concerning MEDIA, further reduce the imbalances in the nationality of the beneficiaries of programme funding through positive discrimination.

- Define the objectives for positive discrimination (Level Playing Field).
- Review the categorisation of high, medium and low PCCs, using a categorisation of countries in terms of the volume of their audiovisual export as well as distribution and reach of audiovisual works on non-national markets on the basis of pre-defined indicators.
- Consider several definitions of diversity, one focused on the cultural and linguistic diversity within Europe and the other one taking into account the

share of European films on the global market, typically dominated by the US players.

Implement the Programme monitoring activities and related reporting and fine-tune the framework according to changing markets and policy priorities

- Strengthen the monitoring framework systems and processes for the Creative Europe Programme before mid-2018.

4.4 Efficiency

Target budgetary allocations on the most efficient schemes

- At programme level:
 - Consider focusing budgetary allocations on a few steps in the value chain generating EU added value and focus the programme where EU funding can have the most impact
- At scheme level:
 - Consider strengthening award criteria of the schemes that contribute the most to the higher level programme objectives.

Improve application procedures and the Creative Europe Desks (CEDs) function

- Continue to improve the application procedures in order to ensure that the administrative requirements are commensurate to the amount awarded.
- Improve CEDs functions.

4.5 Sustainability

Consider strengthening mechanisms to disseminate the results of funded projects so as to improve the sustainability of their impacts

- Clarify the role and activities of project leaders and their partners, the EACEA, DG EAC and DG CNECT in communicating on the results achieved and the lessons learnt.
- Scope opportunities for a programme of shared conferences and showcase events to disseminate results, with an emphasis on cross-sectoral issues and collaboration.
- Consider how Creative Europe Desks can be used to enhance the communication of results.

Review how to enhance the exploitation of supported outputs

- Consider expanding existing activities that promote supported outputs, such as enhancing promotional work to highlight the critical success of EU films.
- Consider the scope and value of an award criterion to develop a sustainable exploitation plan of project outputs, especially for schemes in the Culture sub-programme.
- Consider mechanisms for ensuring the exploitation of project outputs in the Culture Sub-programme.

4.6 EU added value

Capitalise on the partnerships and networks developed through supported projects, and which are core to EU added value

Consider the adoption of monitoring mechanisms to ensure the development of partnerships that have particular value and that may not otherwise occur, e.g.

between high and low PCCs, in areas where transnational partnerships have a potential to further develop.





Annex 1 Intervention logics of Creative Europe and its predecessor programmes

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Annex 1 Intervention logics of Creative Europe and its predecessor programmes

This annex presents the intervention logic models as used by the evaluation for the current and the predecessor programmes. For evaluation purposes separate, integrated intervention logic models were created for:

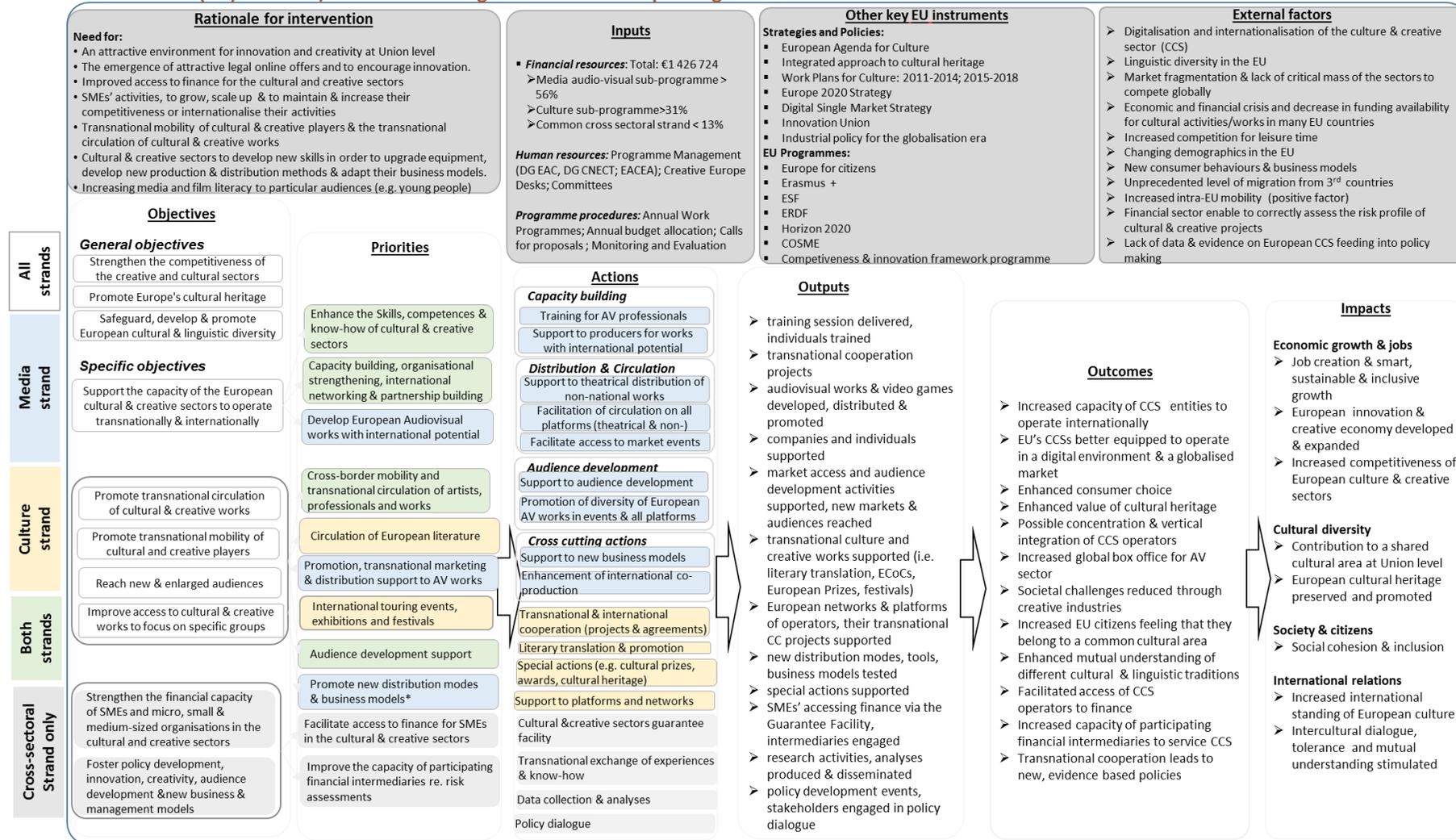
- The Creative Europe Programme (presented in Figure A1.1);
- The Cross-sectoral Strand of Creative Europe;
- MEDIA programmes field (current Sub-programme and the predecessor programme);
- Culture programmes field (current Sub-programme and the predecessor programme).

A1.1 Creative Europe

This intervention logic of the Creative Europe Programme is presented in **Figure A1.1**. It summarizes the key inputs, principal types of actions, outputs, expected outcomes and impacts.

Figure A1.1 Integrated intervention logic for the Creative Europe programme and predecessor programmes

REGULATION (EU) No 1295/2013 establishing the Creative Europe Programme



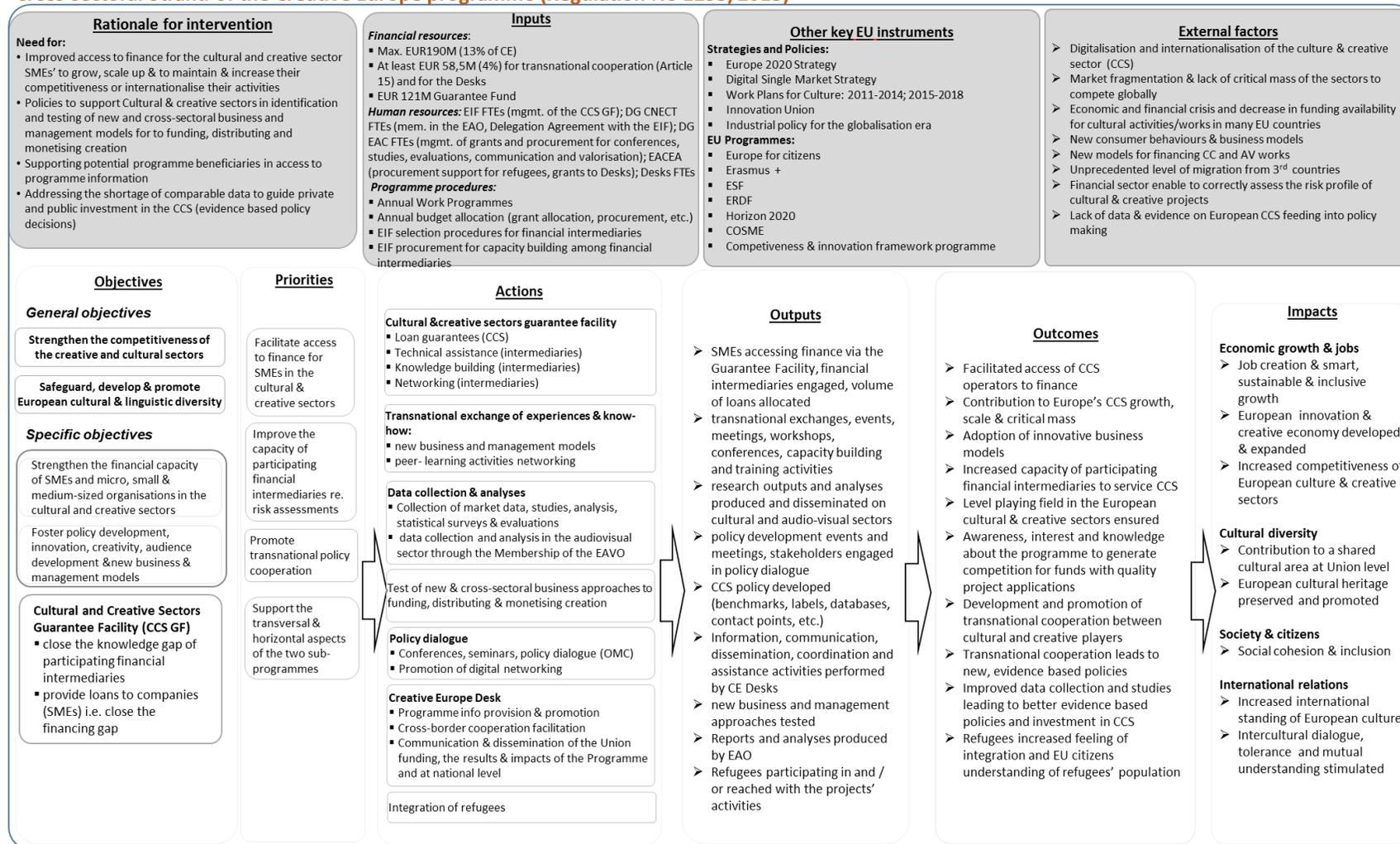
*This is an explicit priority in Regulation 1295/2013, art 9, point 2,b). For the culture sub programme, art 12, point1a) refers to new business as a result of developing skills and competences

A1.1.2 The Cross-sectoral Strand

The intervention logic model for the Cross-sectoral Strand of the Creative Europe Programme is presented as **Figure A1.2**.

Figure A1.2 Intervention Logic for the Cross-sectoral Strand

Cross-sectoral Strand of the Creative Europe programme (Regulation No 1295/2013)

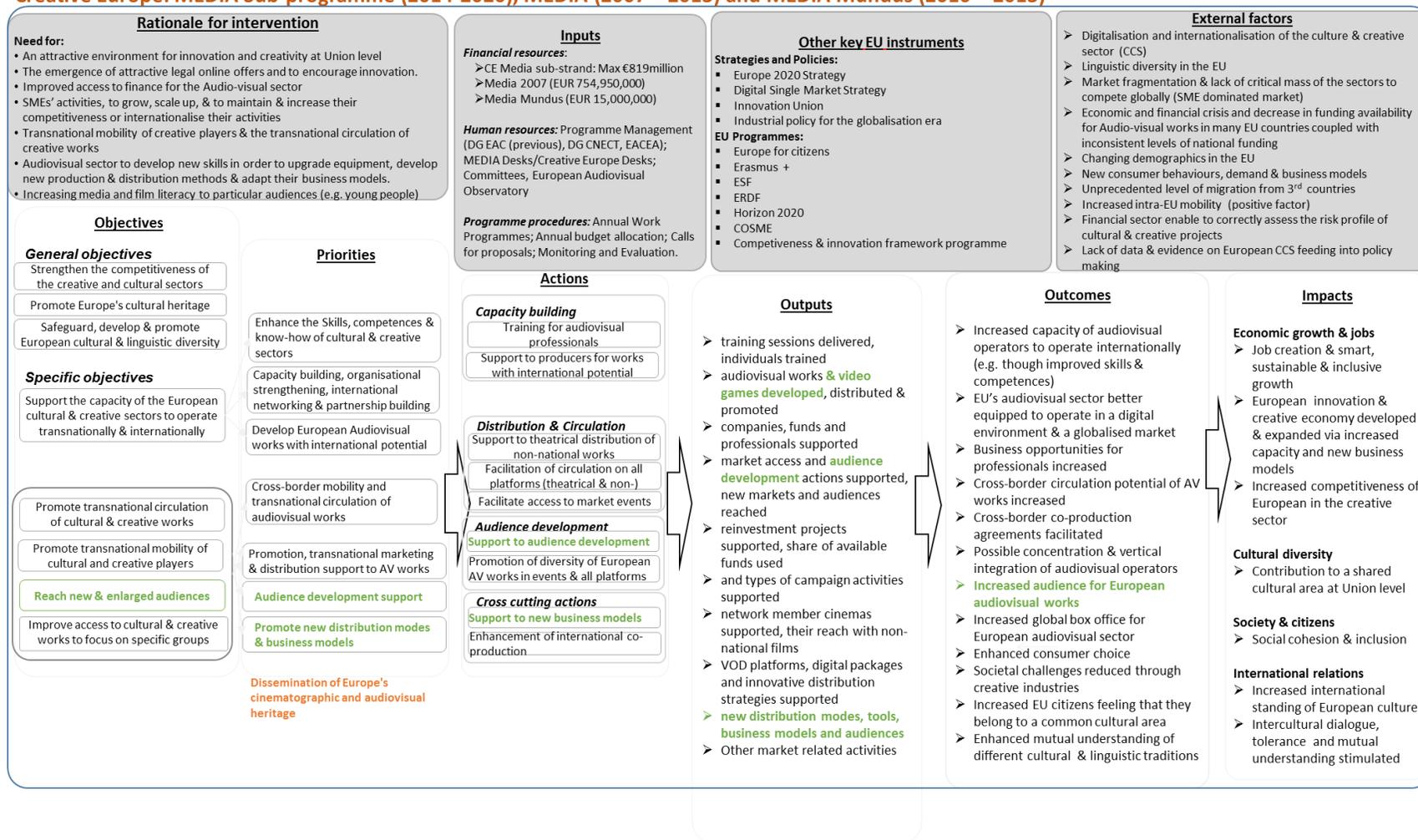


A1.2 MEDIA Programmes field

An integrated intervention logic model was developed for the MEDIA programmes field to allow comparative evaluation of the predecessor MEDIA 2007 and the current MEDIA sub-programme. It is presented as **Figure A1.3**.

Figure A1.3 Integrated intervention logic for MEDIA programmes field

Creative Europe: MEDIA Sub-programme (2014-2020), MEDIA (2007 – 2013) and MEDIA Mundus (2010 – 2013)

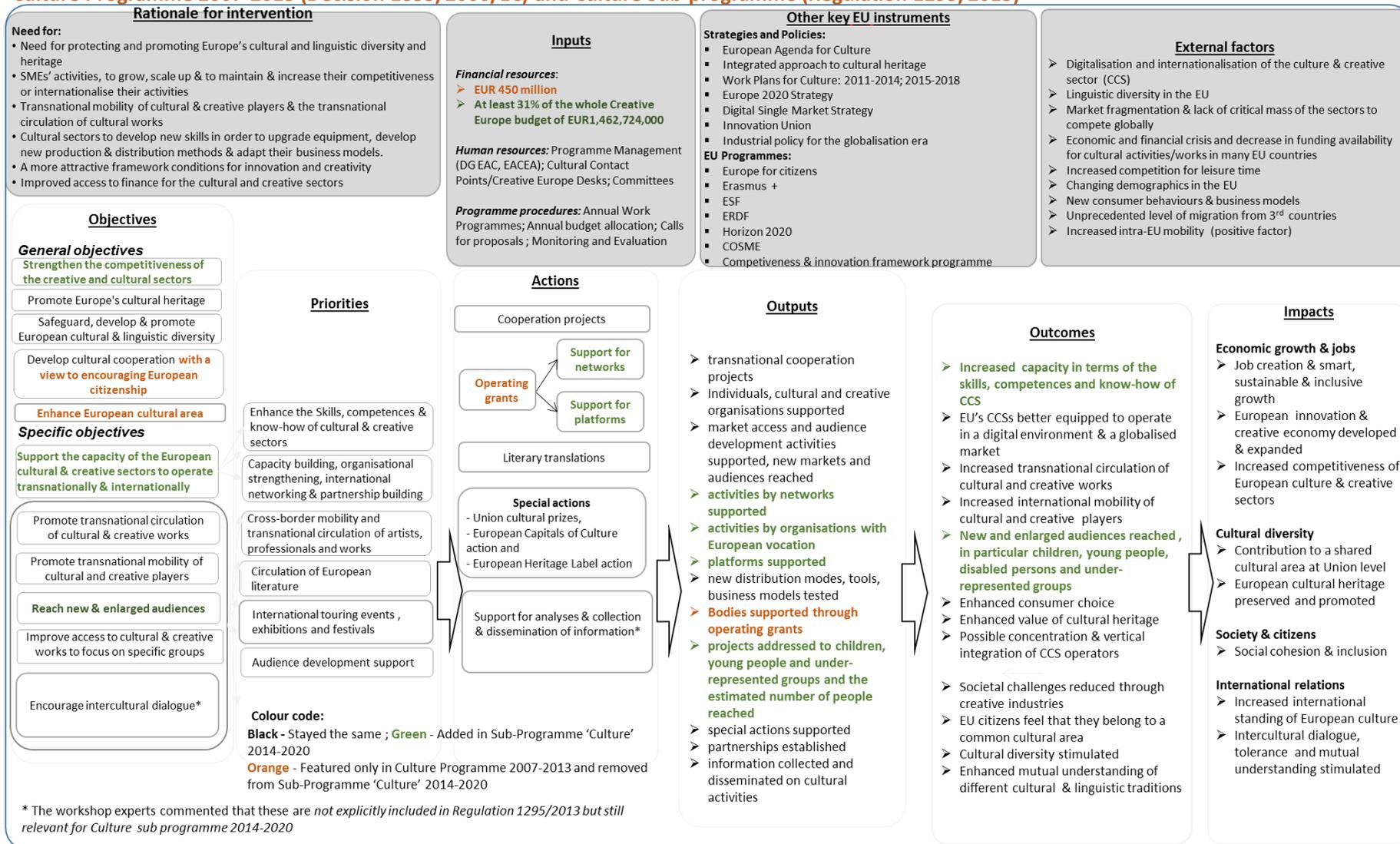


A1.3 Culture programmes field

Figure A1.4 provides an integrate intervention logic model for the predecessor programme (Culture 2007-2013) and the current Culture Sub-programme.

Figure A1.4 Integrated intervention logic for Culture programmes field

Culture Programme 2007-2013 (Decision 1855/2006/EC) and Culture Sub-programme (Regulation 1295/2013)







Annex 2 Outputs, results and impacts of schemes

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Annex 2 Outputs, results and impacts of schemes

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Annex 2 Outputs, results and impacts of schemes

This annex addresses the evaluation question 'To what extent are the various programme schemes and actions under Creative Europe and its predecessor programmes are delivering or have delivered the expected outputs, results and impacts?' include in the evaluation under effectiveness evaluation criterion. It provides supporting evidence for the DFR sections 3.3.8 and 3.3.9 that provide a comparative summary of the findings presented in this annex on the programmes' level.

A2.1 Predecessor MEDIA and Culture programmes

A2.1.1 Outputs, results and impacts of predecessor MEDIA schemes

A2.1.1.1 Training¹

A total of €57.1 million was spent on training under the MEDIA predecessor Programme, including €46.2 million on the Continuous Training and €10.9 million on the Initial Training schemes. Continuous Training supported 327 projects, while Initial Training financed 88 projects in the period 2007-2013². The Continuous Training initiatives were delivered in a total of 19 countries; 20% took place in Germany, 19% in France, 10% in Italy and 9% in the UK. The remaining 42% of projects were implemented in the 15 other countries³.

A total of around 12,400 participants and 8,800 professionals took part in the predecessor MEDIA training⁴. This amounts to 1.1% of all employed in the audiovisual sector in 2013⁵. Participants of the predecessor training scheme were 51% female and 49% male. Most of the participants were citizens of one of the Member State of the European Union – 93%, with further 4% representing EFTA countries, 1% other third countries and further 2% who had not provided their nationality.

Only a handful of respondents⁶ whose projects benefited from the training initiatives supported under the predecessor programmes replied to the MEDIA survey. All respondents acknowledged that their projects aimed at facilitating mutual learning and knowledge transfer among audiovisual professionals, and two-third indicated that it aimed at improving the knowledge of audiovisual professionals of other markets', and one third at increasing the circulation of European audiovisual works in Europe.

Respondents considered their projects either as 'very effective' or 'effective' in delivering against these three objectives of the schemes. This was corroborated by the findings of the MEDIA 2007 Interim evaluation⁷. Half of all respondents consulted via the MEDIA survey regarding this scheme reported that they delivered all planned

¹ As the training activities supported by the current Programme were evaluated by a separate study, the MEDIA survey covered only the training activities provided by predecessor MEDIA programmes.

² Many of the training initiatives were supported across a number of years, hence the total number of 'unique' training initiatives supported was much lower.

³ There was no training projects supported in Austria, Cyprus, Estonia, Finland, Latvia, Lithuania, Malta, Portugal, Slovakia and Slovenia.

⁴ The EACEA participant data does not allow the breakdown of participation data by Initial and continuous training schemes. It does not include participation in 2007 training activities as these were supported by the then predecessor programme.

⁵ Eurostat data for employment in Motion picture, video and television programme production, sound recording and music publishing activities; and Programming and broadcasting activities combined.

⁶ Five in total

⁷ The Interim evaluation states that the predecessor evaluation MEDIA 2007 support for Continuous Training is 'effective, on the whole, and generates a significant "quality label"', effect (pgs. 9 and 64. 86 and 94).

outputs and results, the other half reported that their projects delivered most of the planned outputs and results.

In terms of impact, half of the respondents who benefited from the Continuous and Initial Training Schemes support considered that their projects had a 'major impact' on helping the audiovisual professionals which they trained to embrace (new) market opportunities, and a further 25% reported a 'moderate impact' in this area. Due to the factor of recall the present evaluation did not attempt to confirm or challenge this assessment with the beneficiaries of the predecessor training⁸.

A2.1.1.2 Development

An overall total amount of €125 million was allocated under the predecessor MEDIA Programme to support the development of films, of which €53.7 million was allocated to the support of Single Projects and €71.4 million to Slate funding. The Development Single⁹ scheme supported 1,354 film projects during the predecessor period, while the Slate Funding scheme supported 490 slates (3.7 films per slate on average).

From the total funding allocated to the Single Projects scheme under the predecessor MEDIA programme, 55% went to the five high PCC countries¹⁰, while the remaining 45% were shared among the other 26 beneficiary countries. The majority (51%) of the predecessor MEDIA programme Slate Funding support was allocated to three countries, namely France (28% of total funding), Germany (12%) and the UK (11%), while the remaining 49% were shared among the remaining 24 countries¹¹.

The Development Single and Slate have met and slightly exceeded their targets in terms of the number of projects supported over the last programming period. The two schemes were less effective in delivering their planned outputs. The Single Projects scheme supported on average 193 film projects per year, reaching and exceeding the 180-190 projects annual target¹². The Slate development scheme aimed to support 70-75 slates yearly, which was achieved with support to around 70 slate projects per year.

Only around one third (33% for Single and 31% for Slate) of development projects delivered *all* their anticipated outputs and results, as reported by respondents of MEDIA survey¹³. Only 3% of respondents (or 3 project representatives out of 105) indicated that their Single projects delivered none of the outputs that were planned¹⁴. In terms of outcomes / results, the data collected in the context of FE on MEDIA distribution schemes suggests that:

At least half of the projects supported by the Single Projects scheme during the predecessor MEDIA Programme went into production. When extrapolating this ratio to all funded projects, it can be estimated that approximately 670 films were produced

⁸ The training activities took place at least four years ago or more. The participants' recall of the impact of the training would have a low reliability.

⁹ During the period 2011-2013 (the last three years of MEDIA 2007) the Single Projects scheme supported 293 fiction films (48%), 239 documentaries (39%) and 84 animations (14% of all projects). No Programme data was available on the genres of films supported by Single Projects during the period 2007-2010.

¹⁰ France 16%, the UK 13%, Germany 10%, Italy 9% and Spain 8%.

¹¹ Malta and Slovakia did not benefit from this scheme during the predecessor Programme period.

¹² Targets were (and still are) specified in the annual work programmes. These are adjusted based on the budgets available and annual performance each year.

¹³ A further 55% of respondents for Single Projects and 62% for Slate Funding reported that their projects delivered most of the outputs and results planned. A total of 6% for Single and 3% for Slate reported that their projects produced only few of their anticipated outputs and results.

¹⁴ The Development Single Projects scheme also had a significant impact establishing partnerships between project developers/directors, international co-producers or co-developers. The evidence collected during FE(2) on MEDIA Development schemes shows that the Single Projects scheme led to the projects' cooperation with ca. 3,250 partners, of which ca. 480 were international during the predecessor period.

after having received development support from the predecessor Programme. The evidence further suggests that around two thirds of the audiovisual works produced (or around 450 films in total) entered the market. The supported films received an average IMDB rating of 6.5 out of 10 possible score ranging from 5.8 to 8¹⁵.

According to the focused evaluation, it can be *estimated* that around 39% of the audiovisual works supported through Slate projects during the predecessor Programme went into production. Out of the 2,040 audiovisual works supported by the scheme during the previous Programme period, an estimated 790 audiovisual works went into production¹⁶. Around 20% (or 400) of all works supported by the Slate Funding scheme of MEDIA 2007 made it to the market. Overall, the works received an average IMDB rating of 6.4 points out of 10 ranging from 3.1 to 8.1¹⁷.

The predecessor Development schemes have overall achieved their anticipated key impacts. Evidence shows¹⁸ that the MEDIA Development schemes helped companies to maintain the scale of their operations, enabled them to assess the feasibility of projects for the Development Single scheme and supported them in securing follow up funding for their development project. The Slate Funding scheme support was also seen as contributing to the longer-term financial stability *and strategic planning capacity* of the supported companies, helping them to leverage financial support for the projects included in their slates.

The support of the Slate Funding scheme was perceived to have a greater effect (than Single Projects) on increasing the circulation of supported audiovisual works, the feasibility of European audiovisual works and the companies' capacity to invest in the further development of European AV works. The Slate Funding scheme had less effect than the Single Projects scheme on improving access of audiences to European AV works (i.e. diversity of offer) and on allowing supporting companies to participate in the development of European AV works on 'more equal terms' with operators from higher PCCs (i.e. levelling playing field) .

A2.1.1.3 TV Broadcasting

A total predecessor MEDIA spending on the TV Broadcasting scheme as €79 million, or €11.3 million annually. The scheme supported a total of 461 TV production projects supported, on average 66 projects per year. Most, 67% of all projects supported were from high PCCs, 25% from medium PCCs and 8% from low PCCs.

The support provided under this scheme contributed to the production of 461 unique titles of European TV productions. The share of the titles supported per high, medium and low PCC mirrors that of projects supported (310 from high PCCs, 116 from medium PCCs and 35 from low PCCs).

The scheme provided support to around 300 unique companies in the sector, 190 (63%) in high PCCs, 86 (29%) in medium and 31 (10%) in low PCCs. The 13 beneficiaries of the scheme, who participated in the MEDIA survey reported that the predecessor Programme had a moderate to major impact on increasing the scale of their activities (92% in total, major impact reported by 54% of respondents, while 38% reported moderate impact), increasing their links or cooperation with other

¹⁵ Based on a mapping of a sample of works included in the scope of the focused evaluation. For comparison: Only very few movies have been rated with a score of 9 or above (The Shawshank Redemption and the Godfather 1 and 2, see <http://www.imdb.com/chart/top?sort=rk,asc&mode=simple&page=1>, accessed on the 16th of February, 2016). The top 250 of feature films listed have a rating between 9.2 and 8.0. Overall, IMDB can be considered a relative critical platform.

¹⁶ The numbers are likely to be higher, especially as the data quality in the final reports from 2010-2012 was low.

¹⁷ Based on a mapping of a sample of works included in the scope of the focused evaluation.

¹⁸ Focused evaluation on the MEDIA Development schemes and MEDIA survey results

audiovisual sector operators (83% in total, major impact reported by 42% of respondents, while 42% reported moderate impact) and increased our investment in promotion and distribution of European audiovisual works (75% in total, major impact reported by 25% of respondents, while 50% reported moderate impact). The interviews undertaken in the context of the FE focused on this scheme confirmed that it had an important impact on extending the pool of partners and enabled better quality of the final TV product. The average IMDb rating of supported coproductions was 7.15 out of 10, 7.2 for animation, 7.3 for documentary and 6.9 for fiction genre¹⁹

A2.1.1.4 Distribution

A total of €354.8 million was invested in distribution schemes under the predecessor MEDIA Programme, or an average of €50.6 million per year. The key inputs, outputs and results of the MEDIA 2007 are summarised in Table A2.1.

Table A2.1 Summary of Distribution Schemes' key inputs, outputs and results

Inputs and outputs	Support to European VOD Services and digitalisation of cinemas				
	Cinema Automatic	Cinema Selective	Support to European VOD Services and digitalisation of cinemas projects	Sales Agents	Cinema Networks
Total funding	€140.6 million ²⁰ , €20 million per year on av.	€87.2 million ²¹ , €12.5 million per year on av.	€47.1 million, €6.7 million per year on av.	€6.4 million, €912 thousand per year on av.	€73.5 million, €10.5 million per year on av.
Total number of projects supported	4,968 projects ²² , 710 per year on av.	812 projects ²³ , 116 per year on av.	100 VOD projects; 257 digitalisation, 51 per year in total on av.	194 projects ²⁴ , 28 per year on av.	Repeat funding for a pan-European network.
Total number of unique titles supported	1,772 films (an average of 253 per year). ²⁵	343 films (an average of 49 per year).	NA	169 films (on average 24 films per year)	NA
Total number of unique distributors	330	519	33 unique non-	38 sales agents	One cinema network, 816

¹⁹ Because of the limited number of projects included in the FE sample, the mapping was undertaken across the predecessor and current programmes (period 2012-2014) to improve the reliability of results.

²⁰ €16.2 million 2007, €18.9 million in 2008, €20.6 million in 2009, €20.2 million in 2010, €22.8 million in 2011, €20.8 million in 2012, and €21.0 million in 2013

²¹ €12.1 million in 2007, €13.2 million in 2008, €13.0 million in 2009, €12.5 million in 2010, €12.4 million in 2011, €12.3 million in 2012, and €11.7 million in 2013

²² Module 1 – 26; Module 2 - 3,187; Module 3 - 1,756

²³ Module 1 – 26; Module 2 - 3,187; Module 3 - 1,756

²⁴ Module 1 – 26; Module 2 - 3,187; Module 3 - 1,756

²⁵ Programme data. The total number of films supported is smaller than the average number of films per year multiplied by the number of years because films may have been supported in more than one year.

Inputs and outputs	Cinema Automatic	Cinema Selective	Support to European VOD Services and digitalisation of cinemas projects	Sales Agents	Cinema Networks
operators supported			theatrical distributors; assisted the digitalisation of 187 cinemas' owners and operators		cinemas and 1,916 screens ²⁶

Source: Programme data, ICF and BOP analysis

From the total funding awarded through these schemes, 54 per cent of Cinema Automatic funding and 64 per cent of Cinema Selective funding went to distributors from the five high PCC countries.²⁷ By comparison, these same countries received 74 per cent of total EU cinema admissions in 2013.²⁸ The remaining 46 per cent of Cinema Automatic funding was awarded to 26 other beneficiary countries, and the remaining 36 per cent of Cinema Selective funding was awarded to 27 other countries. The shares of the Support for European VOD Services scheme are unlikely to be totally representative because of the small number of projects; however, France was the largest beneficiary of this scheme by a significant margin, receiving over 50 per cent of the total awarded funding. The remaining funding was shared among 10 other countries. For Sales Agents, 80 per cent of the funding went to the five high PCC countries, and the remaining 20 per cent was distributed among 5 other countries.²⁹ For TV Broadcasting, 73 per cent of the funding went to the five high PCC countries, and the remaining 27 per cent was distributed among 21 other countries.³⁰

From the total funding awarded through these schemes, 77 per cent of Cinema Automatic funding, 61 per cent of Cinema Selective funding, and 49 per cent of Sales Agents funding went to films from the five high PCC countries.³¹

²⁶ Interim evaluation of MEDIA 2007, number of screens in MEDIA participating countries only.

²⁷ For Cinema Automatic, 16% of the total awarded funding went to Germany, 15% to France, 11% to Italy, 10% to Spain, and 2% to the UK. For Cinema Selective, 16% of the total awarded funding went to Germany, 15% to France, 13% to Italy and Spain, and 6% to the UK.

²⁸ European Audiovisual Observatory, 'Box office up in the European Union in 2014 as European films break market share record', <http://www.obs.coe.int/documents/205595/3477362/MIF2015-CinemaMarketTrends2014-EN.pdf/3a393b66-1428-4e38-8484-ecdb60962236>

²⁹ For Sales Agents, 55% of the total awarded funding went to France, 14% to Germany, 7% to the UK, and 2% each to Italy and Spain.

³⁰ For TV Broadcasting, 36% of the total awarded funding went to France, 18% to Germany, 13% to the United Kingdom, 3% to Spain, and 2% to Italy.

³¹ For Cinema Automatic, 34% of the total awarded funding went to films from France, 22% to films from the UK, 9% to films from Germany, 7% to films from Spain, and 5% to films from Italy. For Cinema Selective, 24% of the total awarded funding went to films from France, 17% to films from the UK, 8% to films from Italy, and 6% each to films from Germany and Spain. For Sales Agents, 15% of the total awarded funding went to films from Germany, another 15% to films from the UK, 10% to films from Italy, 6% to films from Spain, and 3% to films from France. The remaining 23 per cent of Cinema Automatic funding went to films from 23 other countries, the remaining 39 per cent of Cinema Selective funding went to films from 21 other countries, and the remaining 51 per cent of Sales Agents funding went to films from 20 other countries.

Films supported by Cinema Automatic received an average of 55.4 million non-national admissions per year in participating countries, between 2007 and 2013 (Table A2.2).³²

Films supported by Cinema Automatic were distributed in an average of 14.3 territories, and films supported by Cinema Selective were distributed in an average of 19.9 territories.³³ In comparison, EU films produced and released between 2005 and 2014 were released in cinemas in 2.6 countries.³⁴

Overall, films supported by Cinema Automatic and Cinema Selective are of a slightly higher than average quality, and perform well at awards.

Table A2.2 Cinema Automatic and Cinema Selective key impacts

Quality	Cinema Automatic	Cinema Selective
Total number of non-national admissions in participating countries (per year / total)	55.4 million / 387.8 million	14.9 million / 104.1 million
Average number of distribution territories (global total)	14.3	19.9
Average admissions per distribution territory	18,812	24,742
Average IMDB score	6.7 out of 10	6.9 out of 10
Average number of awards	7.8	11.3
Average number of nominations	12.3	14.5

Source: EACEA admissions data, EAO distribution territories, IMDB ratings and awards, ICF and BOP analysis

Cinema Automatic, Cinema Selective, and Support to European VOD Services achieved most of their key expected impacts, as evidenced by the findings of the MEDIA Survey and beneficiary interviews.³⁵ They were most effective in increasing investment in the promotion and distribution of European AV works. Cinema Automatic and Cinema Selective were most effective in increasing investment in the promotion and distribution of European AV works (86 per cent of Cinema Automatic and 75 per cent of Cinema Selective respondents reported major or moderate impact), increasing the number/scale of activities undertaken (86 per cent and 69 per cent), and improving access to AV works among audiences (72 per cent and 69 per cent). They were notably less successful in increasing the number of people employed by organisations (0 per cent and 25 per cent).

The main reported impacts by beneficiaries of Support to European VOD Services were an increased number/scale of activities, improved access to their AV works among audiences, improved attractiveness of their VOD services and increased viewership of their VOD catalogues. The scheme appeared to have had a slightly lower impact on organisations' turnover or market position.³⁶

³² Based on EACEA admissions data. Including admissions for all participating countries. This comprises an annual average of 44.2 admissions for all films from high PCCs, 10.0 admissions for all films from medium PCCs, and 1.2 million admissions for all films from low PCCs.

³³ Based on a sample of supported projects per year for each scheme, and the EAO Lumiere Database for the number of distribution territories.

³⁴ Grece for EAO (2016) *How do films circulate on VOD services and in Cinemas in the European Union?*

³⁵ It is not possible to assess the impacts of Sales Agents and Cinema Networks due to a lack of response from these beneficiaries to the MEDIA Survey.

³⁶ One of the three respondents reported that it had made no impact in this area.

A2.1.1.5 Promotion

The predecessor MEDIA programme supported a number of schemes that aimed to facilitate access of audiovisual professionals to key trade events in their market, assist them with online B2B tools³⁷ and help them to promote their European audiovisual works³⁸. The predecessor MEDIA Programme allocated 11% (or €84 million) to supporting these promotional activities during the period 2007-2013. The predecessor Programme supported a total of around 330 market access projects (or around 50 per year), around 640 film festivals' projects (around 90 annually) and 32 MEDIA stands (four 4 per year)³⁹.

According to the MEDIA survey results, the predecessor MEDIA promotion schemes were overall effective in delivering their outputs and results: 54% of all respondents reported that their project delivered all planned outputs and results and a further 46% considered that they achieved 'most' of the results. In terms of impact, 62% of the respondents indicated that predecessor MEDIA support had a 'major impact' on increasing the visibility of their European audiovisual works, 62% that it increased the diversity of their audiovisual works' offer and 46% that the predecessor Programme increased audiences for their works.

1.1.1.1 Initiative i2i Audiovisual

Initiative i2i Audiovisual, with a total budget of €19.4 million, supported around 530 projects under the predecessor MEDIA Programme with the objective to facilitate their access to finance by subsidising a part of their production-related costs e.g. insurance, interest charges and completion guarantees. Around 50% of the funds were allocated to projects in France (19%), Belgium (11%), the Netherlands (10%) and Germany (8%). A further 5% went to Denmark, Spain, Sweden, Ireland and Luxembourg each, while the remaining 27% were distributed among projects from 16 other European countries.

Only a very limited number of survey responses⁴⁰ were received from audiovisual companies that had benefited from the support of this predecessor scheme and their answers are rather divided. One respondent reported that the support by the predecessor Programme had a 'major impact' on improving the company's access to finance from financial institutions, one reported a 'minor impact' on access to finance and the third project 'no impact'. The discontinuation of Initiative i2i Audiovisual and the delay with the implementation of the CCS GF has created a gap that makes it harder for the audiovisual industry to access finance⁴¹.

1.1.1.2 Previous MEDIA fund

The Media Production Guarantee Fund (MPGF) overall had a positive impact on access to finance of CSS operators and on the capacity of financial intermediaries to serve the financial needs of the sector⁴². However, of the two implementing parties entrusted with the management of the €8 million of the MPGF (each being responsible for €4 million), CREA and IFCIC, only IFCIC was able to achieve tangible results, as between 2011 and 2013 it used 92% of the fund to finance more than €70 million in loans – representing a leverage effect of more than 5. The loans financed a total of 33 films

³⁷ Market Access scheme (around 300 projects supported), Action 1 supported access to trade events, Action 2 development of online B2B tools

³⁸ Festivals (around 642 projects supported under the predecessor Programme)

³⁹ Projects often involved supporting the same company or festival repeatedly over several years, so in terms unique operators or festivals supported, the numbers are likely to be one third of those indicated

⁴⁰ Three complete answers.

⁴¹ Interview with a CED

⁴² This section is based on evidence gathered via the survey and the key informant interviews.

produced by 44 production companies across Europe, which would otherwise not have been financed or at least not to the same level of ambition.

The MPMGF also had an impact on the capacity of financial intermediaries to serve the financial needs of the creative and cultural sectors. Both IFCIC and CREA developed knowledge on how to analyse the risks involved in financing non-national films on a European scale and how to finance co-production with institutions offer financial guarantees across Europe. This in turn has had a positive effect on their capacity to advise the financial intermediaries on European co-productions. In addition, financial intermediaries with whom they work developed an interest in the CSS sectors: some financial intermediaries are building portfolios of projects in CSS sub-sectors and or across sectors.

Lastly, through exchange of views, practices and strategies, the MPMGF brought together likeminded organisations in Europe involved in providing guarantees to creative and culture sectors. This networking effect and lessons learned derived from the implementation from the MPMGF is valuable in the context of the implementation of the Cross Sectoral Guaranty Facility.

A2.1.2 Outputs, results and impacts of predecessor Culture schemes

A2.1.2.1 Cooperation projects

A total of €256.1 million was invested in Cooperation Projects under the predecessor Culture Programme, comprising €136.3 million allocated to 80 Multi-Annual Cooperation Projects, €117.7 million to 695 Cooperation Measures (excluding translation), and €2 million to 11 Cooperation Projects between organisations involved in cultural policy analysis.

These projects were delivered by lead applicants from 32 countries (including 5 non-EU countries) and partners from 39 countries (including 11 non-EU countries).⁴³

The majority of Cooperation Projects delivered all or most of their planned outputs/results, as reported by respondents of the Culture Survey and affirmed by a mapping of a sample of final reports.⁴⁴ For Multi-Annual Cooperation Projects, 57 per cent delivered *all* of their outputs/results. For Cooperation Measures 58 per cent and Cooperation Projects with Third Countries 60 per cent.⁴⁵

Based on a mapped sample of project final reports, these projects resulted in an average of 248 activities⁴⁶, which allowed for the participation of, on average, 295 CC players. The projects supported the transnational mobility of on average 273 CC

⁴³ Based on all projects funded through these schemes, 43 per cent of applicants and 31 per cent of partners were from France, Germany, Italy, and the UK, which together make up 54 per cent of the EU population. The remaining 57 per cent of applicants came from 28 other countries, and the remaining 69 per cent of partners came from 34 other countries.

⁴⁴ Overall, final report data for Cooperation Projects is very inconsistent and qualitative. For example, there are significant gaps in evidence e.g. where workshops are reported as having taken place but where no total number of participants are reported. To ensure the most robust evidence, comparative final report data has been selected for a limited number of years to allow comparisons between programming periods. From 2008, 16 out of 17 mapped final reports showed that the projects were implemented as expected.

⁴⁵ For Multi-Annual Cooperation Projects, a further 32 per cent delivered *most* of their outputs/results. For Cooperation Measures, a further 42 per cent delivered most of their outputs/results. For Cooperation Projects with Third Countries, a further 40 per cent delivered most of their outputs/results.

⁴⁶ 2008 only. A combined total of 4,230 activities. The number of activities reported varied considerably between projects and type of activities. The largest number of activities reported were the creation of artworks (3,782 activities); with 'seminars, conferences, symposiums and debates' the next highest at 149 activities.

players per project.⁴⁷ In terms of audience numbers, the same mapped projects reported reaching an average of 11,234⁴⁸.

All three schemes have achieved most of their key expected impacts, as evidenced by the results of the Culture Survey. The greatest impacts were an increased number/scale of activities (90 per cent major or moderate impact for Multi-Annual Cooperation Projects, 87 per cent for Cooperation Measures, and 92 per cent for Cooperation Projects with Third Parties), increased diversity of the type of activities (88 per cent, 84 per cent, and 86 per cent, respectively), and improved access to CC works among audiences (82 per cent, 74 per cent, and 86 per cent). A substantial number of projects were successful in increasing the number of people employed by organisations (34 per cent, 39 per cent, and 42 per cent). Based on the Culture survey, 86 per cent of respondents fully or partially agreed that the grant had an impact on deepening the collaboration with existing partners; and 98 per cent fully/partially agreed that the grant allowed them to collaborate with new partners from other European countries. Lastly, a majority of survey respondents also reported a (minor, moderate or major) impact on the use of digital technologies, both for the promotion of cultural and creative works (86 per cent) and the development of new markets (around 85 per cent).

1.1.1.3 Cultural bodies

A total of €16.1 million was invested in Cultural Bodies of European Interest under the predecessor Culture Programme. Each year, between 27 and 42 networks were funded, with a total of 207 annual grants signed.

The projects were broadly effective in delivering their expected outputs/results, as evidenced by the findings of the Culture Survey.⁴⁹

Projects funded under this scheme were effective in achieving some but not all of their key expected impacts, according to survey findings. The greatest impacts of this scheme were an increased number/scale of activities undertaken, and increased diversity of the type of activities undertaken (91 per cent major or moderate impact in both cases).⁵⁰

1.1.1.4 Literary translation

A total of €17.3 million were allocated through the Literary Translation scheme during the predecessor Culture Programme. The main beneficiaries during the predecessor programmes came from Bulgaria (12% of the funded projects), Slovakia and Hungary (9% each). Italy was the fourth most successful country in terms of number of projects supported (ca. 7%) and was therefore the most successful large Member State and the most successful 'old' Member State⁵¹.

⁴⁷ Note that these figures cover considerably variations from project to project – the figures on transnational mobility of CC Players range from 0 to 1,062 per project among the mapped projects.

⁴⁸ Note that in many cases, the total audience figures are based on audience figures of only a few projects; e.g. many of the mapped projects did not report reaching audiences made up of children, young people and people from under-represented groups.

⁴⁹ 91 per cent reported that their project had delivered all its outputs/results, and the remaining 9 per cent reported that it had delivered most of its outputs/results.

⁵⁰ The scheme had less of an impact on increasing the use of digital technologies for the development of new markets for CC works and for the promotion of CC works (36 per cent major or moderate impact in both cases).

⁵¹ On an aggregated level, within the first two years after the launch of the predecessor programme, in 2009, the 'new' MS replaced the 'old' EU15 countries as the most successful beneficiary countries in terms of funding.

In terms of outputs, the predecessor literary Translation scheme delivered slightly below the planned annual targets. The Culture Programme 2007-2013 supported 3,161 translations undertaken by 641 funded projects. This amounted to 92 projects supported each year (or 20% under the 115 projects annual target⁵²). The scheme led to an estimated 3.7million⁵³ translated books printed, based on an average realised print run of 1,180 books per project⁵⁴.

In terms of results, at least 2.9 million translated books supported by the predecessor Culture Programme have been sold⁵⁵. The average price for a translated book indicated in the final reports mapped was €13.32. The publishers, however, indicated that books were intended to have follow-up print-runs after the end of the projects. Therefore, the actual number of books printed and sold is most likely higher than the average reported in the final reports.

The key impacts reported in the predecessor Literary Translation projects included raised profiles of translators, improved access to European translated works and increased national/ linguistic diversity of literary works translated. The support under this scheme had lesser impact on the growth of European publishers, their use of digital technologies in promotion and distribution of translated literary works and employment in the European publishing sector.

A2.2 Current MEDIA and Culture Sub-programmes

A2.2.1 Outputs, results and impacts of the current MEDIA schemes

A2.2.1.1 Training

A total of €23.3 million was spent on MEDIA training by the Creative Europe Programme during its first three years of implementation. This supported 171 training initiatives, mostly in Germany and France, the UK, Italy and the Netherlands. The biggest part of the scheme's resources were spent to support training projects organised in Germany (accounting for 21% or €4.8 million), followed by France (14% or €3.3 million), Italy (12% or €2.8 million) and the UK (8% or €1.9 million). The remaining 45% of the scheme's budget was spent on training projects in 14 other countries⁵⁶.

On average 1,700 European audiovisual professionals have benefited from the MEDIA supported training annually since the start of Creative Europe – most of them came from the five high PCCs (41% of all participants on average during the first two years of the Programme). A further one third of the participants came from 10 medium PCCs (32%) and a bit more than one fourth from 22 low PCCs (27%)⁵⁷. The participation to MEDIA training is almost gender balanced – 52% male and 48% female audiovisual professionals.

In terms of results, i.e. skills and qualifications gained, the MEDIA training projects were overall effective, having contributed to both creative skills and commercial skills,

⁵² As specified by the Annual Work Programmes during the period 2007-2013.

⁵³ As 3,161 translations were produced and the average number of print runs indicated in the final report 1180 times. In the final reports of projects, beneficiaries were asked to indicate the number of sales planned and the number of sales realised at the end of the project. In our interviews, a publisher pointed out: *"The first print run stated in the final report is only the starting print run. We always hope to have more print runs, and usually we do (...) Only few our books from projects supported by CE never made a second print run"*.

⁵⁴ According to final reports of predecessor projects, on average, the starting print runs were planned to have a volume of ca. 1,200 books. Hence, this volume was nearly achieved at the end of the projects.

⁵⁵ Estimation based on a combination of programme and survey data.

⁵⁶ Programme data, ICF analysis.

⁵⁷ According to the data provided by the EACEA for 2014 and 2015

with more emphasis on the latter⁵⁸. The training was overall effective in delivering craft-specific and interpersonal skills, moderately so in developing management skills and less so with regard to digital and other skills⁵⁹. Only one of the 58 training initiatives⁶⁰ examined led to a recognised qualification. According to the participants survey the MEDIA training has been overall effective⁶¹.

The training projects are also reported to be relatively effective in terms of impacts. A considerable majority of the MEDIA training participants (66%) indicated that it has to a 'great extent' contributed to increased competitiveness of the European audiovisual sector⁶², improved capacity of audiovisual professionals to operate internationally (77%) and contributed to their transnational mobility (62%), improved their financial and business management skills (57%) as well as use of policy development, innovation, creativity, audience development and business management models through transnational cooperation (57%)⁶³. In terms of cumulative effects, the support for MEDIA training has produced specialists able to further train newcomers, allowed professionals to increasingly (i.e. by participation in several training activities supported by the programme) build up skills and networks, and also helped the participating professionals to embrace the digital shift⁶⁴.

A2.2.1.2 Development

Single Projects and Slate Funding

A total of €55.2 million have been allocated by the Development Single Projects (total of €18.3 million) and the Slate Funding schemes during the first three years of the current Programme. The average yearly spending under the MEDIA development schemes (Single Projects and Slate Funding) increased by 3% compared to predecessor.

With the start of the current Programme a 20% of the MEDIA budget for the development schemes has been transferred from Single Projects in favour of the Slate Funding scheme. This resulted in 22% decrease in the number of projects supported by Single (from 193 under MEDIA 2007 to 150) and five more projects supported by State finding (increase of 8% from 70 to 75 projects) each year. This means that in terms of targets⁶⁵, the Single Projects scheme met its targets, while the Slate Funding scheme was five projects short of targets each year.

During its first three years under the current Programme, the Single Projects scheme has supported 451 projects of around 400 companies. The output of the scheme under Creative Europe decreased in comparison with the Predecessor Programme, mirroring the decrease in funding⁶⁶. The Slate Funding scheme has supported 226 projects

⁵⁸ IDEA, 'Contribution of the Creative Europe Programme to fostering Creativity and Skills Development in the Audiovisual Sector', Final Report (2016), pg. 63, Figure 4.16 (no period or totals were indicated).

⁵⁹ IDEA, Final Report (2016), pg. 65

⁶⁰ The findings are based on the 58 projects supported in the programme period 2014-2016, IDEA, Final Report (2016), pg. 38.

⁶¹ According to the Participants survey (n=500) the MEDIA training has been overall effective. Effectiveness of the training offered on various subjects was assessed by respondents with an average of 2.6 out of 3 (where 2 was 'fairly effective' and 3 'very effective'. The training offer was the most effective on 'project development' and least, on 'animation'. IDEA, Final Report (2016), pg. 64

⁶² The IDEA Participants survey (n=484).

⁶³ The IDEA Participants survey (n=477).

⁶⁴ Interview and MEDIA survey results.

⁶⁵ As set in the Annual work programmes: 160 single projects and 80 slates in 2014, 160 single projects and 80 slates in 2015, and 125 single projects and 80 slates in 2016.

⁶⁶ Decrease from an average of €7.6 million under the predecessor Programme to an average of €6.1 million under the current Programme per year.

during the first three years of the current Programme, including the development of around 880 audiovisual works, of ca. 200 companies under Creative Europe.

Development schemes Single Projects and Slate Funding supported a total of 1,330 films (Single 450 films and Slate 880 films), 443 films per year on average. Number of films per slate supported by Slate Funding projects increased to 3.9 (from 3.7 under the predecessor scheme). In the period 2014-2016, most of the projects supported by Single Projects were fiction films, with slightly less documentaries and more animations supported by the scheme compared to the predecessor period⁶⁷.

Both schemes slightly improved in terms of overall distribution of funding to a more diverse range of participants: the Single Projects in terms of increased diversity and number of countries covered⁶⁸. The share of Single Projects support allocated to high PPCs decreased from 57% under the predecessor MEDIA to 26% under Creative Europe, while the support to medium PCCs increased from 28% to 43% and the low PCCs from 16% to 32%⁶⁹. The share of funding allocated under Slate Projects to high PCC fell from 60% under MEDIA 2007 to 40% in the current Programme, that of medium PCCs increased from 34% to 50% and that of low PCCs from 6% to 10%.

According to the results of the MEDIA survey, the current Single Projects and Slate Funding schemes are performing slightly better than those of the predecessor MEDIA Programme in terms of delivering their planned outputs and intended outcomes. For Single Projects, based on the MEDIA survey, 44% of respondents with completed projects delivered all their outputs and outcomes, and 56% delivered most of their outputs and outcomes (compared to 33% and 55% respectively under MEDIA 2007). For completed projects under Slate Funding, half of the respondents reported that their projects delivered all outputs and outcomes, and the other half most of them (compared to 30/60 share under the predecessor Programme). Similar findings apply to ongoing projects under the Single and Slate schemes.

The focused evaluation on the Development schemes show that the Slate Funding scheme is more effective in terms of audiovisual works that enter the production stage than the Single Projects scheme. According the estimations 30%⁷⁰ of the audiovisual works supported by the Single Projects scheme of Creative Europe went into production (i.e. around 135 works in total during the first three years of the Programme)⁷¹ while for Slate Funding the share is at least 54%⁷² (leading to estimated 450 supported works that have gone to production).

Mid-way through the current Programme implementation, the projects supported under Single Projects and Slate Funding schemes are not likely to have produced some of their longer-term impacts to their full extent yet, while some other impacts (e.g. employment, turnover, project diversity and feasibility considerations) may have to some extent already been produced. Overall, the MEDIA survey respondents

⁶⁷ 49% fiction, 33% documentaries and 18% animation projects, compared to 48%, 39% and 14% of the predecessor Programme

⁶⁸ Participants in Single Projects increased came from 31 countries under the predecessor MEDIA Programme to 33 countries under Creative Europe. Serbia joint the scheme with five projects supported in the current period, Macedonia and Albania each with one project. No projects from Switzerland have been supported during the first three years of the current Programme.

⁶⁹ The new top five countries are (in terms of number of projects supported): Belgium (7%), Sweden (7%), Italy (6%), Germany (6%) and Norway (5%), followed by Denmark, France, Ireland and Spain (5% each).

⁷⁰ This is 20 p.p. lower than under the predecessor MEDIA Programme, likely due to the increased diversity of the audiovisual works supported, but also possibly because some works have been supported only recently and will take time to enter the production stage.

⁷¹ The numbers are likely to be higher, as the project mapping included reports from 2014 and many of those indicated that the production phase is going to start in 2016 or 2017. The development of audiovisual works was supported only recently, it is too early to judge the extent the supported works have entered the market or the quality of the works produced.

⁷² This represent a 14 p.p. increase compared to the predecessor MEDIA Programme

reported a relatively stronger impact of the Slate Funding scheme across all impact categories, but especially in relation to the increase in the scale of activities of supported companies, their capacity to invest in development and compete with other competitors located in larger PCCs. The respondents supported by the Single Projects scheme reported similar impacts of the Programme funding, but on a relatively smaller scale. The impacts of ongoing projects on the circulation and audiences' reach of their developed works were less prominent. As confirmed by the results of FE2, the development schemes had an overall limited impact on creating employment. However, the Development Single Projects scheme has helped companies to build capacity for Slate Funding. Slate Funding has helped companies to scale up and compete on an international level.

In addition, the interviewees and MEDIA survey respondents noted that Creative Europe label obtained through Development Single Projects and Slate Funding is especially beneficial to secure follow-up funding for the project. Furthermore, the considerable investment that is required in preparation of applications for Slate Funding, applicants, including unsuccessful, reported that this preparation has helped them in thinking about the company's longer term strategy.

The evidence collected suggests⁷³ that the very low success rate and high number of low quality applications under Single Projects have important negative impacts in terms of attractiveness of the scheme and its effectiveness as a first point of entry for audiovisual operators.

Support to the Development of Video Games

Video games development scheme supported 86 projects under Creative Europe providing funding for a total of € 9.4 million from 2014 to 2016. Contrarily to other schemes, funds allocation shows a strong geographical divide. Organisations in only 18 Member States and two non-EU countries were awarded⁷⁴. About 60% of the budget was awarded to companies in six MSs (Poland, Denmark, Germany, Sweden, Norway, and France).

Most of the expected final and intermediary outputs and results were delivered by the funded projects⁷⁵.

The Video Games development scheme had a considerable impact on the participating companies by increasing the number and scale of their activities⁷⁶, the number of people employed by them⁷⁷ and the capacity of such companies to invest in the development of European videogames⁷⁸, finally supporting the overall feasibility of such projects.⁷⁹

TV Programming

A total of €39.2 million were invested under the current Creative Europe Programme to support development of TV Programming. The scheme supported 165 projects during the first three years of the current Programme period – or 55 projects yearly on average, which slightly exceeds the set annual targets⁸⁰. The scheme has

⁷³ Application data and interviews with the Programme managers.

⁷⁴ Organisations in Serbia and Norway were also awarded. No projects were financed in the following MSs: Bulgaria, Croatia, Cyprus, Estonia, Greece, Latvia, Luxembourg, Malta, Romania, Slovakia.

⁷⁵ About 80% of MEDIA survey respondents (mostly on-going projects) stated to have delivered their final and intermediary outputs.

⁷⁶ About 95% of MEDIA survey respondents (N=20)

⁷⁷ About 85% of MEDIA survey respondents (N=20)

⁷⁸ About 75% of MEDIA survey respondents (N=20)

⁷⁹ About 90% of MEDIA survey respondents (N=20)

⁸⁰ 50 projects per year, as stipulated by the Annual work programmes for the period.

supported fewer projects each year than the predecessor MEDIA (66 projects per year) despite the 15% budget increase⁸¹.

The programme data shows that this scheme is almost exclusively benefiting applicants from five countries (across the high and medium PCCs categories). In the period 2014-2016 France received 30% of the total support available under this scheme, the UK (19%), Sweden (14%), Denmark (11%) and Germany (8%). Together these countries appropriated 82% of the funding in this period⁸².

The projects supported by the TV Programming scheme have been or are effective in delivering their planned outputs and outcomes.⁸³ The scheme supported the production of 165 unique titles of European TV productions. The current scheme has supported or is currently supporting 140 unique companies, 76 (54%) from high PCCs, 47 (34%) medium and 18 (13%) from low PCCs. The distribution of support is more balanced than under the predecessor Programme (63% in high PCCs, 29% medium and 10% low PCCs)⁸⁴.

The structure of the scheme required applicants to have reached several partners and developed a strong and well defined financial strategy beforehand. For this reason, not only all financed works were expected to be produced, but also not funded projects would have been likely to be pursued without Creative Europe support.

The scheme has limited effect on the improved feasibility of projects, but on other aspects of the productions:

The Creative Europe financing increased the quality of the productions, ensuring a higher success rate for the works. More expensive locations, costumes and sets were made available to producers by the extra funding provided by the scheme.⁸⁵

Also, the prospect of accessing additional funding through the TV Programming scheme can encourage production companies to '*expand their national horizon, go out of their comfort zone and get in touch with new partners*'.⁸⁶ It is estimated that during the period 2014-2016 more than 1,500 partnerships were created by supported projects.⁸⁷ National support schemes, if they are oriented towards international productions (e.g. Scandinavian funds) assist in development of strong partnerships for international co-productions.

Publicly available data on 50 out of the 115 projects financed in 2012 and 2014⁸⁸ shown that only a small percentage of works were given an IMDB rating below 6 (with 10 being the best quality), confirming an overall high quality of the projects supported

⁸¹ According to the Programme data the spending on this scheme increase from €11.3 million per year under the predecessor MEDIA to €13 million under the current MEDIA Sub-programme.

⁸² Under the predecessor MEDIA 67% of all projects supported were from high PCCs, 25% from medium PCCs and 8% from low PCCs. The division of funds under Creative Europe is more in favour of medium (and low) PCCs, 53% high, 36% medium and 11% low PCCs.

⁸³ This finding was confirmed by the survey results. The relevant respondents of the MEDIA survey reported that 71% of projects delivered all their planned outputs and outcomes, while a further 14% reported that their projects delivered most of the anticipated outputs. An additional 14% reported an 'other' status in relation to their projects' outcomes (i.e. mostly 'just finished, and hence too early to say). Ongoing projects under this scheme seem to be well on track, with 73% of all respondents indicating that their projects have delivered 'all' and 27% 'most' of their intermediary outputs and results.

⁸⁴ LPF provisions embedded in the scheme award criteria have increased the number of successful applications for low (+14%) and medium PCCs (+18%) during the period 2014-2016.

⁸⁵ This was confirmed by interviews conducted with beneficiaries and unsuccessful applicants.

⁸⁶ This was confirmed by interviews undertaken and survey results: almost all respondents financed by the scheme (N=35) agreed that the funding: improved their capacity to engage in international and transnational cooperation; and operated as a catalyst to strengthen their international activities.

⁸⁷ Source: FE3: ICF mapping of 40 randomly selected projects. Broadcasters (1,106), Distributors (182), Co-Producers (231).

⁸⁸ <http://www.imdb.com>

(that have made it to the market). Documentaries supported had higher IMDb ratings (7.3 on average) than the other funded projects, animation (7.2) or fiction (6.9). Around half of the projects mapped were nominated for international awards; 34% of them received an award.

On a wider scale, the TV Programming scheme has made a considerable impact on the sector including an increase in the circulation of the TV series produced, an increase in their feasibility, an increase in the producers' capacity to invest in the development of these works, and an increase in the overall scale of production activities (as per scheme objectives).⁸⁹ The current scheme has had a stronger impact on the diversity of productions developed by the Programme participants and on increasing employment in the beneficiary organisations (also because the production activities rely heavily on the use of freelancers) than predecessor programmes.⁹⁰

Cumulative / long-term impacts of the scheme include:

- The development of awareness that presales are important and allow greater degree of financial viability.
- Increased financial capacity: 64% of the companies that received the scheme's more than once applied for funding projects with a larger budget than their first project financed⁹¹. This effect is more pronounced for companies located in high or medium PCCs than those in low PCCs.
- Increasing producers independence vis-à-vis broadcasters and the conditions of the scheme have been adopted by national and regional support schemes.

A2.2.1.3 Distribution

A total of €142.4 million was invested between 2014 and 2016 in distribution schemes under Creative Europe, representing an annual budget decrease of 6%⁹² compared to MEDIA 2007. A total of 4,277 projects were supported in the period or 1,426 projects on av. per year (2% more than during predecessor MEDIA per year). The key inputs, outputs and results of the current MEDIA distribution schemes are presented in Table A2.3.

Table A2.3 Summary of MEDIA Sub-programme's distribution schemes' inputs, outputs and results, compared to predecessor MEDIA 2007

Inputs/ outputs	Cinema Automatic	Cinema Selective	Online Distribution	Sales Agents	Cinema Networks
Total funding	€59.1 million ⁹³ , €19.7 million per year (decrease of 2%)	€30.6 million ⁹⁴ , €10.2 million per year (decrease of 18%)	€16.7 million, €5.6 million per year (increase of 4%)	€4.7 million, €1.6 million per year (increase of 70%)	€31.4 million, €10.5 million per year (same level of support)

⁸⁹ On top of survey results, project data shows that 64% percent of the companies that were awarded more than once applied for funding projects with a larger budget than their first project financed by the TV scheme

⁹⁰ Data from MEDIA survey results

⁹¹ Programme data, ICF analysis

⁹² Based on yearly average spending figures (Programme data).

⁹³ €18.4 million in 2014, €20.3 million in 2015, and €20.4 million in 2016

⁹⁴ €11.1 million in 2014, €10.3 million in 2015, and €9.3 million in 2016

Inputs/ outputs	Cinema Automatic	Cinema Selective	Online Distribution	Sales Agents	Cinema Networks
Total number of projects supported	2,665 projects ⁹⁵ , 888 per year on av. (25% increase)	1,392 projects, 464 per year on av. (300% increase ⁹⁶)	57 projects, 19 per year on av. (63% decrease ⁹⁷)	139 projects, 46 per year on av. (67% increase)	Repeat funding for a pan-European network.
Total number of unique titles supported	967 films to date ⁹⁸ or 322 films per year on average	78 films to date ⁹⁹ or 26 films per year on average		125 films to date or 42 films per year on average	
Total number of unique operators supported	273 theatrical distributors	280 theatrical distributors	23 unique non-theatrical distributors	37 sales agents	One cinema network, 1,024 cinemas and 2,463 screens ¹⁰⁰

Source: Programme data, ICF and BOP analysis

From the total funding awarded through these schemes, 56 per cent of Cinema Automatic funding and 58 per cent of Cinema Selective funding went to distributors from the five high PCC countries.¹⁰¹ By comparison, these same countries received 73 per cent of total EU cinema admissions in the years 2014 to 2016.¹⁰² The remaining 44 per cent of Cinema Automatic funding and 42 per cent of Cinema Selective funding was shared among distributors from 24 other countries. As with the predecessor Support to European VOD Services scheme, the figures for Online Distribution are unlikely to be representative due to the small number of projects. However, French organisations continued to be the largest beneficiaries of this scheme by a significant margin, receiving 53 per cent of the total awarded funding to date. The remaining funding was distributed among 9 other countries. Among the films available on a sample of these services, 73 per cent of all films were EU films, and 44 per cent were EU non-national films.¹⁰³ For Sales Agents, 86 per cent of the funding went to the five

⁹⁵ Module 1 – 5; Module 2 – 1675; Module 3 - 1,006.

⁹⁶ As examined above, this is due to the way projects are recorded in the Programme data.

⁹⁷ In calculation of the decrease also the Cinemas digitalisation projects have been included for the predecessor MEDIA

⁹⁸ Programme data. The total number of films supported is smaller than the average number of films per year multiplied by the number of years because films may have been supported in more than one year.

⁹⁹ Programme data. The same caveat as above also applies here.

¹⁰⁰ Europa Cinemas, Financial Support, MEDIA <http://www.europa-cinemas.org/en/Financial-Supports/MEDIA>

¹⁰¹ For Cinema Automatic, 17% of the total awarded funding went to Germany, 16% to France, 12% to Italy, 9% to Spain, and 2% to the UK. For Cinema Selective, 15% of the total awarded funding went to Germany, 14% to France, 12% to Italy, 11% to Spain, and 6% to the UK.

¹⁰² European Audiovisual Observatory, 'Box office hit record high in the European Union in 2015', <http://www.obs.coe.int/documents/205595/3477362/MIF2016-CinemaMarketTrends-EN.pdf/88c2aefc-525f-48fc-a805-0d8ed243bc1e> (with final figures from 2014); 'Cinema box office takings in the EU remained above EUR 7 billion in 2016 as admissions approached the magical 1 billion barrier', <http://www.obs.coe.int/en/-/pr-cannes-2017-cinema-market-trends> (with final figures from 2015 and first estimates for 2016).

¹⁰³ Based on the Note on Conclusions of the Evaluation Committee for the renewal of FPA, year 3; and self-reported and unverified data from projects.

high PCC countries, and the remaining 14 per cent of the funding was distributed among three other countries.¹⁰⁴

Based on the sample of films supported in 2015, from the total funding awarded through these schemes, 75 per cent of Cinema Automatic funding and 51 per cent of Cinema Selective funding went to films from the five high PCC countries.¹⁰⁵ The remaining 25 per cent of Cinema Automatic funding went to films from 21 other countries, and the remaining 49 per cent of Cinema Selective funding went to films from 7 other countries. Sales Agents supported films from 17 different countries.¹⁰⁶

Films supported by Cinema Automatic received a total of 58.8 million non-national admissions in participating countries in 2014 and 2015 (Table A2.4).¹⁰⁷ Cinema Selective received an average of 11.5 million non-national admissions.¹⁰⁸

Films supported by Cinema Automatic were distributed in an average of 17.9 territories, and films supported by Cinema Selective were distributed in an average of 22.8 territories, a slight increase over the predecessor programme in both cases.¹⁰⁹

Cinema Automatic and Cinema Selective films also tended to be of slightly higher quality than other films and received a high number of awards and nominations.¹¹⁰

Table A2.4 Cinema Automatic and Cinema Selective

Quality	Cinema Automatic	Cinema Selective
Total number of admissions in participating countries (per year / total)	116.3 million / 174.5 million ¹¹¹	11.5 million / 34.4 million
Average number of distribution territories (global total)	17.9	22.8
Average admissions in participating countries	19,281	16,130
Average IMDB score	6.7 out of 10	6.8 out of 10
Average number of awards	6.6	8.6

¹⁰⁴ For Sales Agents, 51% of the total awarded funding went to France, 23% to Germany, 10% to the UK, 1% to Italy, and 0.4% to Spain. The other three countries are Denmark, Austria, and Finland.

¹⁰⁵ 2015 is the only year for which there is data available about film nationalities across the relevant schemes. For Cinema Automatic, 27% of the total awarded funding went to films from France, 23% to films from the UK, 10% to films from Italy, 9% to films from Germany, and 7% to films from Spain. For Cinema Selective, 36% of the total awarded funding went to films from France, 8% to films from Germany, 6% to films from Italy, and 0.5% to films from the UK; there were no supported films from Spain in this year.

¹⁰⁶ Due to the small number of projects supported, Sales Agents funding has not been broken down by country.

¹⁰⁷ Based on EACEA admissions data. Including non-EU territories that participated in the programme. For 2014, this comprises 45.8 million admissions for all films from high PCCs, 12.0 million admissions for all films from medium PCCs, and 1.0 million admissions for all films from low PCCs.

¹⁰⁸ Based on a sample drawn from the Lumiere database.

¹⁰⁹ Based on a sample of supported projects per year for each scheme, and a search of the EAO Lumiere Database for the number of distribution territories.

¹¹⁰ According to a sample of 30 Cinema Automatic projects and 20 Cinema Selective projects from 2014. Cinema Automatic films received an average score of 6.7 out of 10 on IMDb, and Cinema Selective films received an average score of 6.8, compared to an average score of 6.4 for all films on the website. Cinema Automatic films also received an average of 4.0 awards and 5.9 nominations, and Cinema Selective films received an average of 7.6 awards and 8.4 nominations. However, it should be noted that these numbers are skewed due to the larger number of awards and nominations received by just a few titles.

¹¹¹ Extrapolated based on 2014 and 2015 data only. 2016 data not yet available.

Quality	Cinema Automatic	Cinema Selective
Average number of nominations	9.9	9.1

Source: EACEA admissions data, EAO distribution territories, IMDB ratings and awards, ICF and BOP analysis

Cinema Automatic and Cinema Selective have so far delivered most of their key expected impacts, as evidenced by the findings of the MEDIA Survey. The greatest impacts of these schemes have been an increased level of investment in the promotion and distribution of European AV works (90 per cent of Cinema Automatic and 87 per cent of Cinema Selective respondents reported major or moderate impact), an increased number/scale of activities (83 per cent and 86 per cent), and improved access to AV works among audiences (70 per cent and 78 per cent). However, in line with the findings of the predecessor schemes, these schemes have had limited impact on the number of people employed by organisations (25 per cent and 36 per cent).

Data on audiences for online platforms is very hard to access as it is commercially confidential. There is limited data on performance of supported platforms under Action 1.¹¹² Combined, these platforms have a total of 1,118,494 registered users and 191,149 subscribers (as of 2016), or an average of 93,208 registered users and 15,929 subscribers per service.¹¹³

In the first semester of 2016, the VOD services generated an average of €1.2 million per VOD service (€0.4 million B2B revenue and €0.8 million B2C revenue).¹¹⁴ There is significant variation within these figures, however, and five of the twelve projects report receiving less earned income than the grant amount provided. Ongoing viability must therefore be a concern.

Growth for these services has been strong but should be contextualised by the huge growth in VOD services overall. The number of subscribers for the services increased by over 22,000 over the period for which data is available, which represents an estimated 7 per cent compound annual growth rate (CAGR). There is no comparable data on audiences, but revenues for the EU SVOD market overall more than doubled each year between 2010 and 2014, a CAGR of 113 per cent.¹¹⁵

Overall, Online Distribution has delivered all its key expected impacts, according to survey results. All respondents reported a major or moderate increase in the viewership of their VOD catalogues. Additionally, there were strong positive impacts on the number/scale of activities undertaken, the attractiveness of their VOD services, access to their AV works among audiences, transnational circulation of their AV works, turnover/market position of their organisation/service, and diversity in terms of the types of activities undertaken. There was a less positive impact on the number of people employed by the organisations (60 per cent).

Sales Agents has had mixed success in delivering its key expected impacts, based on survey results. Half of respondents reported a major or moderate increase in the share of European non-national films shown in cinemas, scale of promotional activities of non-national European films towards potential audiences, and number of screenings of non-national European films in cinemas. Only 1 in 4 respondents reported a major or

¹¹² Based on the Note on Conclusions of the Evaluation Committee for the renewal of FPA, year 3; and self-reported and unverified data from projects. Apparent inconsistencies in the data (e.g. duplicates) have been excluded. Assumption that data is for a two-year period, which may not precisely correlate with measurement of audiences or funded activity.

¹¹³ Beneficiary project reports to the EACEA.

¹¹⁴ Beneficiary project reports to the EACEA. Revenue was only reported by 11 of the 12 VOD services as complete figures were not available or appeared inaccurate.

¹¹⁵ Note reporting periods may not align. Based on the Note on Conclusions for the Evaluation Committee for the renewal of FPA, year 3. Industry benchmark sourced in Grece for EAO (2015).

moderate increase in the total audience/admissions of non-national European films and investment in films from lower PCCs.¹¹⁶

It has not been possible to evaluate the impacts of Cinema Networks due to a lack of survey data.

Cumulative / long-term impacts of the scheme include:

- Development of long-lasting international partnerships and increased ability to engage in international and transnational cooperation.
- Cinema Automatic: strengthened the competitive position of participating distributors and increased their investment in European non-national films, as well as their investment in the promotion and distribution of European audiovisual works.¹¹⁷.
- Cinema Selective: contributed to the development of a distribution network for European films.

1.1.1.5 Promotion

Creative Europe supports a number of schemes that include activities aimed at promoting European audiovisual works among audiovisual sector professionals and audiences. As shown in Table A2.5 there was a 36% increase of the annual spending on these schemes under MEDIA Sub-programme, compared to the predecessor MEDIA Programme¹¹⁸.

The key inputs and outputs of the current Programme in relation to the 'promotion' schemes are summarised in Table A2.5 (note that the current Programme supports 24 'promotion' projects more per year than predecessor MEDIA).

Table A2.5 Key inputs, outputs and results of the current MEDIA promotion schemes (2014-2016), compared to predecessor Programme

Scheme	Total award	Annual av. award	No. of projects supported	Annual av. no. of projects
Film Festivals				
MEDIA 2007	€ 22,166,797	€ 3,166,685	603	86
Creative Europe	€ 10,551,500	€ 3,517,167 (av. increase per year 11%)	242	81 (5 less projects per year on av. ¹¹⁹)
Access to Markets				
MEDIA 2007	€ 43,394,259	€ 6,199,180	318	45
Creative Europe	€ 23,408,332	€ 7,802,777	181	60 (15 more)

¹¹⁶ There were only 4 survey responses from beneficiaries of Sales Agents under Creative Europe.

¹¹⁷ 90% of Creative Europe Cinema Automatic respondents to the MEDIA survey reported that the funding has increased their investment in the promotion and distribution of European AV works, although it is unclear if it only increased their investment in the film for which they received support, or if it increased their investment in the promotion and distribution of European AV works more widely.

¹¹⁸ 11% of the total predecessor Programme's annual budget and 15% under the current Programme. The increase in the overall Creative Europe budget (as compared to its predecessor) has also had an additional impact in this area (the amount spent on 'promotion' has increased from €12 to €15.4 million annually).

¹¹⁹ Increase or decrease compared to predecessor MEDIA Programme. Note that Audience Development is new to the current Programme.

Scheme	Total award	Annual av. award (av. increase per year 26%)	No. of projects supported	Annual av. no. of projects projects per year on average)
Audience Development				
MEDIA 2007	NA ¹²⁰	NA	NA	NA
Creative Europe	€ 6,049,683	€ 2,016,561	44	15 (15 more projects per year)
Stands				
MEDIA 2007	€ 18,150,605	€ 2,592,944	28	4
Creative Europe	€ 8,901,652	€ 2,967,217 (av. increase per year 14%)	12	4 (same as before)
Total MEDIA promotion schemes				
MEDIA 2007	€ 83,711,660 (11% of MEDIA 2007)	€ 11,958,809	949	136
Creative Europe	€ 48,911,167 (15% of MEDIA Sub-programme spending in the period 2014-2016)	€ 16,303,722 (av. increase per year 36% and 16% in Audience development is not counted)	479	160 (24 more projects per year)

Source: Programme data, ICF analysis

Table A2.6 illustrates the country origin of the various the MEDIA 'promotion' schemes in terms of their distribution among high, medium and low PCCs.

Table A2.6 Distribution of promotion projects by PCC¹²¹

PCC categories	MEDIA 2007	MEDIA Sub-programme
All promotion schemes		
High PCCs	44%	45%
Medium PCCs	29%	27%
Low PCCs	27%	28%
Access to Markets		
High PCCs	51%	58%
Medium PCCs	30%	28%

¹²⁰ The scheme did not exist under MEDIA 2007

¹²¹ One needs to note that Access to Markets, Festivals and Stands involve different participants and audiences from various countries. There is however, no monitoring data available on the nationalities of the participants or audiences reached.

PCC categories	MEDIA 2007	MEDIA Sub-programme
Low PCCs	18%	14%
Festivals projects		
High PCCs	42%	36%
Medium PCCs	28%	24%
Low PCCs	31%	40%
Audience development projects		
High PCCs	NA	38%
Medium PCCs	NA	24%
Low PCCs	NA	38%

Source: Programme data

The current MEDIA sub programme and the predecessor MEDIA promotion schemes were overall effective in delivering their outputs and results: 52% of all respondents reported that their project delivered all its planned outputs and results, further 46% 'most' of the results. The situation is even better for the ongoing 'promotion' projects with 67% of respondents reporting that their project delivered 'all' and further 31% 'most' intermediary outputs and results (only 2% of respondents indicated that their project delivered few of the planned intermediary outputs).

In terms of impact the 'promotion' projects of Creative Europe seem to be slightly more effective than the projects supported by the predecessor MEDIA programme (while the projects supported remain more effective in the areas related to work with audiovisual professionals than audiences): 71% of the respondents indicated that Creative Europe support had a 'major impact' on increasing the visibility of their European audiovisual works (62% under predecessor MEDIA), 63% that it increased the diversity of their European audiovisual works offer (62% for predecessor) and 50% of respondents indicated that the current Programme increased audiences for their works (as opposed to 46% under MEDIA 2007).

Interviews undertaken in the scope of the study further suggest that each trade event is a gateway allowing access to a specific segment of a market, either in by sub-sector (TV, film) or for specific geographies and regions. Trade events were recognised by stakeholders as good networking forums. Support for festivals works well in terms of developing audiences for European audiovisual works, but more could be done for engaging young audiences¹²². Focus on audience development (in the current programme), training and festivals helped supporting audiovisual operators to develop markets for their works and reach higher audiences.

A2.2.1.4 International Co-Production Funds

The International Co-Production scheme supported 16 projects under Creative Europe providing funding for a total of EUR 4.5 million from 2014 to 2016. International co-production funds in six countries¹²³ received funding over this period, with organisations in the Netherlands been awarded with about 40% of the budget.

Organisations financed reported to have been effective or very effective in:

- developing cross-border co-production agreements,
- developing audiovisual works with a transnational/European appeal,

¹²² Interviews with programme managers and key informant interviews

¹²³ Bosnia & Herzegovina, France, Germany, Italy, Netherlands, Norway

- Increasing the circulation and distribution of European audiovisual works within Europe and/or beyond.¹²⁴

The Programme support provided via this scheme impacted on the participating organisations by increasing the number and scale of their activities¹²⁵ and facilitating their international co-productions¹²⁶.

A2.2.2 Outputs, results and impacts of the current Culture schemes

A2.2.2.1 Cooperation projects¹²⁷

A total of €115.1 million has been invested to date in Cooperation Projects under Creative Europe, comprising €84.9 million in 53 Large-Scale Cooperation Projects and €30.2 million in 158 Small-Scale Cooperation Projects.

The projects have been delivered by lead applicants from 25 countries (including 3 non-EU countries) and partners from 36 countries (including 8 non-EU countries).¹²⁸

Among the completed projects, survey respondents reported that 54 per cent of both Large-Scale and Small-Scale Cooperation Projects delivered all their outputs/results¹²⁹. Mapping of the final reports from a sample of projects from 2014 showed that most projects (12 out of 13) were implemented as expected.¹³⁰

Outputs from the projects are higher than planned. Analysis of final reports suggest that projects achieved a greater number (46 per cent) of activities with a greater reach than targeted.¹³¹ The projects supported the transnational mobility of on

¹²⁴ About 90% of MEDIA survey respondents (N=6)

¹²⁵ 100% of MEDIA survey respondents (N=6)

¹²⁶ 83% of MEDIA survey respondents (N=6)

¹²⁷ Data gaps for Cooperation projects largely relate to the final reports and lack of consistency across submissions from beneficiaries. PMF indicators which cannot be reported on, but where data should be collated in future, include: % of CC players who report on artistic, business or technological innovation due to the Programme support; No. and % of CC players who report improved skills due to Programme support; No. of CC players who report that the participation in the supported project has led to professional opportunities during the past year that would not have resulted otherwise; No. of children, young people and people belonging to under-represented groups reached by the supported projects' activities, by activity type and country, per year. Evidence is provided for No. of cultural activities (i.e. events, exhibitions, exchanges, workshops and festivals) organised transnationally with the Programme's support i.e. no. of activities and no. of countries in which these have been implemented. However, this data is based on the limited number of complete final reports provided and should therefore be treated with caution. There is also significant difference within this category e.g. a small workshop or a large conference are both treated similarly.

¹²⁸ Based on all projects funded through these schemes, 51 per cent of applicants and 42 per cent of partners were from France, Germany, Italy, and the UK, which together make up 54 per cent of the EU population. The remaining 49 per cent of applicants were from 22 other countries, and the remaining 58 per cent of partners from 33 other countries.

¹²⁹ Among the completed projects, Large-Scale Cooperation Projects a further 46 per cent delivered most of their outputs/results; for Small-Scale Cooperation Projects a further 44 per cent delivered most of their outputs/results.

¹³⁰ Still on-going projects have been slightly less effective in delivering their intermediary outputs/results to date. Among Large-Scale Cooperation Projects, 45 per cent delivered all their intermediary outputs/results, and a further 41 per cent delivered most of their intermediary outputs/results. Among Small-Scale Cooperation Projects, 43 per cent delivered all their intermediary outputs/results, and a further 43 per cent delivered most of their intermediary outputs/results. The majority of the others reported that it was too soon to tell, because the project had just begun.

¹³¹ The number of activities reported varied considerably between projects and type of activities. The largest number of activities reported were art performances (858 activities), followed by concerts and shows with 287 activities. No information on the total number of involved CC players can be provided, as the mapped reports provided too patchy information on this to be robust (e.g. several types of activities, which had numbers of activities reported against them, then had 0 CC players reported against these – based on the mapped

average 1,363 CC players per project.¹³² The projects on average delivered support to more than three times as many individual players as planned.

The projects reached significant audiences. The same mapped projects alone reported reaching audiences on average of 14,227. This included an average of 7,795 youth and student audiences.¹³³

Both Large-Scale Cooperation Projects and Small-Scale Cooperation Projects have been successful in achieving most of their key expected impacts, as evidence by the survey findings. In line with the schemes under the predecessor programme, the greatest registered impacts were an increased diversity of the type of activities undertaken (90 per cent major or moderate impact for Large-Scale Cooperation Projects and 84 per cent for Small-Scale Cooperation Projects), an increased number/scale of activities undertaken (87 per cent and 89 per cent); and improved access to CC works among audiences (87 per cent and 81 per cent). A smaller, but still substantial number reported increasing the number of people employed by organisations (39 per cent for both schemes). 86 per cent of respondents fully or partially agreed that the grant had an impact on deepening the collaboration with existing partners; and 95 per cent fully/partially agreed that the grant allowed them to collaborate with new partners from other European countries – almost identical results to those reported by the predecessor programme beneficiaries. Lastly, a majority of survey respondents also reported a (minor, moderate or major) impact on the use of digital technologies, both for the promotion of cultural and creative works (85 per cent) and the development of new markets (around 79 per cent) – the latter slightly lower than under the predecessor programme.

Cumulative / long-term impacts of the scheme include:

- Key informant interviews suggest that management of Small-Scale Cooperation Projects has developed the capacity of CCS operators in smaller countries to manage large-scale cooperation projects.
- Cooperation Projects raised the profile of some participating organisations, making it easier for them to find new partners and secure additional funding, although there is also evidence of this effect in many cases of non-selected projects, making it unclear whether this impact is the result of the funding itself or simply the act of delivering (or developing the application for) a transnational cooperation project, regardless of whether it is funded by Creative Europe.
- Creative Europe Desks have promoted programmes supporting training, which has in turn led to the development of Cooperation Projects.

reports, the ,1806 activities then led to the involvement of only 54 CC players, which does not coincide with the figures provided on the transnational mobility of CC players by the same reports).

¹³² Note that these figures cover considerably variations from project to project – the reported figures on transnational mobility of CC Players for example range from 58 to 6,334 per project.

¹³³ These figures hide considerable variation, with two projects reporting reaching audiences of 13m and 1.4m respectively removed from the average. Note that the information on the audience group 'children, young people and people belonging to under-represented groups' provided by the mapped 2014 reports was again too patchy to be reliable, with most of the 13 project reports reporting 0 for this audience group against the different types of activities.

1.1.1.6 Networks and Platforms¹³⁴

A total of €22.6 million has been invested in 23 Networks (with 68 total annual grants made) and €10.1 million has been invested in eight Platforms to date under Creative Europe.

Overall, projects funded under both schemes have been effective in delivering their expected outputs/results, as evidenced by the findings of the Culture Survey and by analysis of final reports. All completed Networks projects reported that they had delivered all their outputs/results, based on survey findings. Mapping of final reports¹³⁵ show Network projects appear to have met their targets on the number of activities implemented focusing on improved skills and learning experiences, and significantly exceeded (by 90 per cent) activities implemented focusing on mobility experiences. The mapping of the projects based on final reports provides evidence of the size and reach of the Platforms (Table A2.7). Some have been impressive in their reach, with a large number achieving live audiences in the thousands. The data is challenging to analyse at an aggregate level as there are a significant range of types of cultural activity and forms of engagement funded under the scheme (for example, visiting a concert, reading a poem, or engaging with a public artwork). The evidence around increase in audiences is therefore largely based on qualitative evidence gathered.¹³⁶

Table A2.7 Platform - Key achievements

Area	Key data
Membership of Platform	Range of 10-18 with an average of 13.

¹³⁴ Data gaps for Networks largely relate to the challenge of capturing the range of outputs from the wide variety of activities, and ensuring that data is collected from participants in these activities as well as beneficiary organisations. PMF indicators which cannot be reported on, but where data should be collated in future, include: No. and % of CC players who report improved skills due to Programme support; % of CC players who report on artistic, business or technological innovation due to the Programme support; No. and % of network members who report having received support from the network that helped them to internationalise their activities per year; No. and types of B2B tools developed by networks with the Programme's support; No. of CC players (artists / professionals) mobile beyond national borders due to Programme's support, by country of origin (although a proxy is provided); No. of CC players (artists / professionals) who participated in supported projects' activities, by activity type and country (again, a proxy is provided); No. of CC players who report that the participation in the supported project has led to professional opportunities during the past year that would not have resulted otherwise; No. of children, young people and people belonging to under-represented groups reached by the supported projects' activities, by activity type and country, per year; No. of cultural activities (i.e. events, exhibitions, exchanges, workshops and festivals) organised transnationally with the Programme's support i.e. no. of activities and no. of countries in which these have been implemented; No. of people reached by the supported projects' activities, by activity type and country, per year; Quantitative or qualitative evidence from the network members or other potential beneficiaries on the actual or potential use or usefulness of the B2B tools developed by the supported projects.

Gaps around Platform data are mainly due to the limited number of annual reports available (5) and the ; Quantitative or qualitative evidence on new, non-national markets open for supported creators / artists and their works; Qualitative evidence of the impact of communication and branding strategies, including the development of European quality label, by platform, yearly; Qualitative evidence of innovative practices developed, promoted or shared by supported projects; No. of people reached by the supported projects' activities, by activity type and country, per year; No. of cultural activities (i.e. events, exhibitions, exchanges, workshops and festivals) organised transnationally with the Programme's support i.e. no. of activities and no. of countries in which these have been implemented; No. of children, young people and people belonging to under-represented groups reached by the supported projects' activities, by activity type and country, per year; No. of CC players who report that the participation in the supported project has led to professional opportunities during the past year that would not have resulted otherwise; No. of CC players (artists / professionals) who participated in supported projects' activities, by activity type and country; No. of CC players (artists / professionals) mobile beyond national borders due to Programme's support, by country of origin; % of CC players who report on artistic, business or technological innovation due to the Programme support

¹³⁵ Based on 2014 annual reports only

¹³⁶ There is also no industry standard or consistent approach to measurement and so little evidence of whether these are new audiences or whether this activity is deepening engagement with existing audiences.

Area	Key data
Number of artists/producers	On average, each engaged with 130. Significant variation by Platform, ranging from 18 to 301.
Audiences reached	Reach ranged from 5,720 to 66,272. Average is 29,331 (where data available).

Source: Projects' reports mapping

As with the predecessor Cultural Bodies of European Interest scheme, Networks projects have achieved most but not all their key expected impacts, as evidenced by the survey findings and case study interviews. They report the greatest impact in increasing the diversity of the type of activities undertaken (89 per cent of survey beneficiaries report a major or moderate impact). Compared to the predecessor scheme, Networks also were more likely to report improving access to CC works among audiences (77 per cent compared to 64 per cent under the predecessor scheme) but were relatively less successful in increasing the number/scale of activities (77 per cent compared to 91 per cent under the predecessor scheme). The scheme had less of an impact on increasing the number of people employed by organisations (38 per cent). Case study interviewees could set out the rationale for their activities and considered them effective in achieving these impacts.

Platform projects have achieved most of their key expected impacts to date, although they were a relatively new scheme. The greatest area of impact for Platform projects has been the increased diversity of the type of activities undertaken (82 per cent). The scheme has also moderately increased the use of digital technologies for the development of new markets for CC works (82 per cent reported a moderate impact, but none reported a major impact). Similarly to Networks, Platforms also had less of an impact on increasing the number of people employed by organisations (45 per cent reported a moderate impact, with none reporting a major impact). Case study interviewees set out the rationale for their activities and reported significant impact on the development of new audiences and in transnational mobility. Platforms also contributed to the development of three key skill areas: innovative approaches to audience development, innovative approaches to marketing and distribution, and new business and management models. Models for the delivery of Platforms were replicated by beneficiaries and their partners at the national level.

1.1.1.7 Literary translation

The Programme resources dedicated to the Literary Translation scheme have increased by 58% compared to the predecessor Culture Programme (from €2.5 to €3.9 million per year on average)¹³⁷. A total of €11.7 million have been spent on literary translations during the period 2014-2016 (13% higher than originally planned €10.3 million under Creative Europe).

Literary Translation scheme supported by Creative Europe has met its outputs' targets during the period 2014-2016. During the first three years of the implementation the scheme supported a total of 1,394 translations¹³⁸ of 1,066 different titles. It is estimated that 1.6 million translations will be printed under Creative Europe, following the projects supported between 2014 and 2016.

Based on the data provided by the beneficiaries through the Culture survey it can be estimated that the scheme under the current Programme has contributed or will

¹³⁷ The spending on this scheme also has been 13% higher than originally planned under Creative Europe (€11.7 as opposed to the planned €10.3 million during the period 2014-2016).

¹³⁸ Up until 2016, Literary translation supported a total of 4,555 translations that have been produced by 824 projects, both by the predecessor programme and Creative Europe.

contribute to around 1.4 million books sold (either as hard printed copies or ebooks)¹³⁹. Literary works translated under the scheme also gained visibility through the promotion of both books translated, their publishers and translators¹⁴⁰. It can be estimated that projects under Creative Europe will lead to 3,500 promotional activities¹⁴¹.

The priorities of Literary Translation further indicate that the promotion activities shall include the appropriate use of digital technologies. Evidence from the final reports mapped and interviewees suggests that most publishers rely on their social media channels to promote the translated books and to advertise their promotional events. The degree to which the distribution can be achieved digitally depends also on genres. Publishers focusing on children's books indicated that for them, digital distribution channels are of less importance.

Regarding the promotional activities undertaken, the publishers assessed that the overall effect of their promotional activities in terms of visibility for the books in their reports has been good to very good. According to our survey, 24% of respondents attributed their distributions and sales results mostly to the promotion supported by Creative Europe. A further share of 40% indicated that their distributions and sales results were partly due to programme support. Interviewees suggested that for some genres such as children's books, the promotional activities are of utmost importance and highly valued by the publisher.

The impacts of the current Literary Translations scheme are more pronounced across all categories, compared to predecessor scheme. The current scheme has particularly strong positive impact on raising translators' profiles, improving access¹⁴² and diversity of European works. The scheme's support to promotion activities, including online, have led to a strong reported Programme impact in this area. The scheme had a limited impact¹⁴³ on the overall employment in the publishing section, as publishing houses are used to working a lot with freelancers and do not tend to change their behaviour because of programme support¹⁴⁴. As each supported translation also

¹³⁹ Literary projects supported under the current Culture programme are more successful in the distribution and sales of the literary works translated. In relation to the translations undertaken under the current Literary translation scheme 72% respondents indicated that most or all of their translations were distributed and sold (either as hard copies or ebooks) and a further 12% reported that around three quarters of their translations were distributed and sold (compared to 57% and 17% respectively under the predecessor Culture programme).

¹⁴⁰ With the introduction of Creative Europe, the Literary Translation scheme started to support not only the actual translation and publishing, but also promotional activities.

¹⁴¹ The most popular promotional activities are: presence at book fairs, the visits of authors or translators, of festivals or exhibitions or the launching of advertising campaigns. Of the nine randomly mapped 2014 projects, all reported have organised several promotional activities for their translations. On average, 13 activities were planned at the time of application while at the time of the reporting, an average of 19 activities had been organised. The most popular promotional activities were advertising campaigns that were planned by all projects and realised by 8 of them. On average, 3.6 campaigns were organised per project (the mapped 2014 projects published on average 5 translated books). The second most popular promotional activity was the presence at book fairs planned by 8 projects and realised by 7, with an average of 2.2 fairs visited per project. Organising visits of authors or translators was the third most popular activity, planned by 7 projects and conducted by 8. With an average of 3.1 organised visits, publishers organised more visits than originally planned.

¹⁴² For Literary Translation, 84% of survey respondents reported a major or moderate impact on 'improved access to literary works translated among audiences'. It can be estimated that around 5.3 million books were printed and around 3.7 million were sold and reached audiences cross Europe with the support of the scheme across the Culture programmes field (Note that this figure is an aggregate across the predecessor and current programme; as these figures do not exist separately for the two programme periods).

¹⁴³ Interviews with publishers representing supported projects and the Culture survey results

¹⁴⁴ Of the nine reports mapped, five companies indicated that they contracted freelance as a result of their support received by CE which could mean up to 10 people contracted (with an average of 8).¹⁴⁴ Three companies indicated that they also employed more permanent staff as a result of the funding received. All three reported one more person employed permanently. This finding is further supported by the results of the

contains a translator's profile, the scheme considerably increased the visibility of translators among potential readers or clients.

survey: only 8 respondents indicated a major impact on employment due to the funding, and for six of them, that impact related to temporary employment.





Annex 3 Tables for the efficiency assessment of selection MEDIA and Culture schemes

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August 2017

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EUROPEAN COMMISSION

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Annex 3 Detailed presentation of the efficiency assessment of selected MEDIA and Culture schemes

The average cost per project of the Creative Europe Programme in the period 2014-2016, compared to the predecessor programmes is presented in Table A3.1 for selected MEDIA schemes and Table A3.2 for selected key Culture schemes.

Table A3.1 Variations in average cost per projects for selected MEDIA schemes under the two programming periods (amount in EUR or percentages)

Selected schemes MEDIA 2007	Selected schemes MEDIA (CE)	Average cost per project MEDIA 2007	Average cost per project MEDIA (CE)	Variations in average cost per project
Cinema Networks, Cinema Networks - Countries outside MEDIA	Cinema Networks	€10,504,483 ¹	€10,453,333	-0.5%
Distribution - Cinema Automatic	Cinema Automatic	€28,304	€22,169	-22%
Distribution - Cinema Selective - DI01	Distribution Selective	€20,715	€21,984	6%
Continuous / Initial Training - TR01	Capacity Building/Training	€137,652	€136,792	-1%
Development - Single DE01	Development - Single Project	€39,670	€40,632	2%
Development Slate	Development - Slate Funding	€145,792	€163,045	12%
Festival - PR01	Film Festivals	€34,528	€43,601	26%
Promo/Access to markets - PR02	Access to Markets / Single Market Access	€130,313	€129,328	-1%
Sale agents total	Sale agents	€32,916	€33,517	2%
TV Broadcasting - DI04	TV Programming	€170,794	€236,007	38%
VOD / DCD - DD01	On Line Distribution / VOD	€360,820	€292,967	-19%
Stands	Stands	€567,206	€635,832	12%

¹ Average yearly spending. According to the Programme data provided by the EACEA the Cinema Networks scheme had two calls per year under the predecessor MEDIA Programme and one under the current MEDIA Sub-programme. In order to provide comparable figures, the amounts presented in this table are average yearly allocations, rather than average grants per call. It has to be noted that there were two schemes supported under predecessor MEDIA: 'Cinema Networks' and 'Cinema Networks - Countries outside MEDIA'. The figure provided for the predecessor Programme includes a total average award across both of these schemes.

Source: Programme data

Table A3.2 Variations in average cost per projects for selected Culture schemes under the two programming periods (amount in EUR or percentages)

Selected schemes Culture 2007-2013	Selected schemes Culture (CE)	Average cost per project Culture 2007	Average cost per project Culture (CE)	Variations in average cost per project
Cooperation Measures; Cooperation Projects between organisations involved in cultural policy analysis; Multi-annual Cooperation Projects	Large European Cooperation Projects Smaller European Cooperation Projects	€ 325,775	€ 545,472	67%
Network - Advocacy – FPA; Network - Platform – FPA; Networks	European Networks	€ 77,830	€ 332,155	327%
NA (support for Platforms' projects only started with Creative Europe)	European Platforms	NA	€ 736,722	NA
Literary Translation	Literary Translation - Annual Literary Translation - Multi-annual	€ 27,070	€ 60,722	124%

Source: Programme data

The two tables below present the success rates for selected MEDIA and Culture schemes across the programmes' periods.

Table A3.3 Success and ineligibility rate of applications received under a selection of MEDIA schemes over 2007-2016

	Applications 2007-2013		Applications 2014-2016	
	% of applications accepted	% of applications marked as ineligible	% of applications accepted	% of applications marked as ineligible
Cinema Selective	53%	0%	42%	0%
Development - Interactive	21%	25%	na	na
Development videogames	na	na	14%	40%
Development - New Talent	39%	18%	na	na
Development - Slate Funding	35%	7%	55%	6%
TV Broadcasting / programming	44%	15%	38%	18%
VOD	36%	0%	31%	0%
Total	47%	4%	39%	7%

Source: ICF analysis of datasheet provided by EACEA 'MEDIA application data' in February 2017

Table A3.4 Success rate of applications received under a selection of Culture schemes

	Applications 2007-2013		Applications 2014-2016	
	% of applications accepted	% of applications ineligible	% of applications accepted	% of applications ineligible
Annual festival grants	7%	1%	na	na
Cooperation Measures	27%	3%	na	na
Cooperation Measures Third Countries	100%	0%	na	na
Cooperation Projects Larger Scale	na	na	17%	9%
Cooperation Projects Smaller	na	na	13%	9%

Annex 3 Tables for the efficiency assessment of selection MEDIA and Culture schemes

	Applications 2007-2013		Applications 2014-2016	
	% of applications accepted	% of applications ineligible	% of applications accepted	% of applications ineligible
Scale				
Culture 2007 - Ambassadors	30%	5%	na	na
Culture 2007 - Festivals	12%	17%	na	na
Support to European Platforms	na	na	26%	11%
Networks	52%	5%	65%	1%
Culture 2008 - Third countries	24%	3%	na	na
Culture 2007 - Literary Translation	47%	14%	na	na
Literary Translation - Annual	na	na	22%	2%
Literary Translation - Multi-annual	na	na	73%	2%
Multi-annual Cooperation Projects	18%	0%	na	na
Multi-annual festival grants (Partnerships)	14%	0%	na	na
Policy PAG	52%	10%	na	na
Policy SDP	53%	0%	na	na
Cooperation projects between organisations involved in cultural policy analysis	32%	0%	na	na
Support to Refugee Integration Projects	na	na	6%	0%
Total	26%	4%	16%	6%

Source: ICF analysis of datasheet provided by EACEA 'Culture application data' in February 2017

The evidence of the relative performance when it comes to the efficiency of projects funded under the MEDIA predecessor Programme and the Creative Europe MEDIA Sub-programme is presented in Table A3.5.

Table A3.5 Overview table – amounts awarded per year and key results - for some MEDIA scheme(s) – Amounts in EUR million

Names of the schemes as in the Programme data	Annual average amounts awarded under MEDIA 2007 (EUR million)	Annual average amounts awarded under (CE) MEDIA at mid-term (EUR million)	Key results per scheme
Cinema Networks, Cinema Networks - Countries outside MEDIA	10.5	10.5 (same level as the predecessor or MEDIA Programme)	<p>As shown in Table A3.1, the average cost per projects for this scheme has remained relatively constant across the two programming periods.</p> <p>Monitoring data on the admissions to the supported Europa Cinemas member cinemas is published in their annual network review in the statistical yearbook section. Based on the average of €73 million admissions in 2016 and 2017 the cost per admission on average is less than €0.15 per admission.</p> <p>Based on the number of screens as reported for Europa Cinemas in the interim evaluation of MEDIA 2007 (1,916) and currently in the website of the Network (2,463) the efficiency of this scheme has increased as the cost per screen supported has decreased by 23% (or €1,238) from €5,483 per screen per year under the predecessor Programme to €4,244 per screen per year under Creative Europe.</p>
Distribution Automatic / Distribution Automatic reinvestment	20	19.7 (-2% decrease in annual budget compared to MEDIA Predecessor Programme)	<p>As shown in Table A3.1, the average cost per projects for this scheme decreased by 22% between the two programming periods whilst the average yearly budget allocated decreased by 2%. This means that more projects were funded under Creative Europe than under the predecessor MEDIA programme.</p> <p>The current MEDIA Sub-programme supported 27% more films/titles than predecessor programme:</p> <p>253 films supported per year on average (and 1,772 in total) in the period 2007 to 2013;</p>

Names of the schemes as in the Programme data	Annual average amounts awarded under MEDIA 2007 (EUR million)	Annual average amounts awarded under (CE) MEDIA at mid-term (EUR million)	Key results per scheme
			<p>322 films supported per year on average (and 967 in total) in the period 2014 to 2016.</p> <p>The average cost per title supported by Distribution Automatic scheme decreased by 23% or 18,250 EUR.</p> <p>Under the predecessor MEDIA Programme, Cinema Automatic supported 26 projects relating to co-production (Module 1), 3,187 projects relating to minimum distribution guarantees (Module 2), and 1,756 projects relating to prints and advertising costs (Module 3), for an average of 252 films per year, or 1,767 across the duration of the programme.</p> <p>Under Creative Europe, Cinema Automatic has supported 5 projects relating to co-production (Module 1), 1,675 projects relating to minimum distribution guarantees (Module 2), and 1,006 projects relating to prints and advertising costs (Module 3), for a total of 317 films per year, or 950 films to date</p> <p>Creative Europe MEDIA Sub-programme supported 93% more unique companies than the predecessor Programme and this despite a decrease in average cost per action.</p> <p>47 unique companies were supported per year (and 330 in total) in the period 2007 to 2013;</p> <p>91 unique companies were supported per year (and 273 in total) in the period 2014 to 2016.</p> <p>The current MEDIA average cost per unique company supported is 49% (or around 209,700) lower than its predecessor.</p> <p>Creative Europe supported the distribution of films in more geographies</p>

Names of the schemes as in the Programme data	Annual average amounts awarded under MEDIA 2007 (EUR million)	Annual average amounts awarded under (CE) MEDIA at mid-term (EUR million)	Key results per scheme
			<p>than the MEDIA Predecessor Programme² (i.e. 17.9 vs. 14.3 distribution territories on average)</p> <p>Admissions reported under Cinema Automatic of Creative Europe reached 113.8 million in total (or around 56.9 million yearly on average) in non-national territories of participating European countries.</p> <p>Distributors supported by Cinema Automatic scheme of the predecessor MEDIA Programme reported an average of 55.4 million non-national admissions per year in the participating countries, or 387.8 million non-national admissions in the period 2007 and 2013.³</p> <p>The cost per one admission reported slightly decreased (by 2 cents EUR or 6%) under current MEDIA, compared to predecessor Programme.</p>
Distribution - Cinema Selective / Distribution Selective	12.5	10.2 (-18% decrease in annual budget compared to MEDIA Predecessor Programme)	<p>As shown in Table A3.1, the average cost per projects for this scheme increased by 6% between the two programming periods.</p> <p>23% (or 137) less projects have been funded under Creative Europe than under the predecessor MEDIA programme.</p> <p>Creative Europe supported more unique companies than predecessor programmes (26% or 19 more on average per year):</p> <p>74 unique companies supported per year (and a total of 519) in the period 2007 to 2013;</p> <p>93 unique companies supported per year</p>

² Based on a sample of supported projects per year for each scheme, and a search of the EAO Lumiere Database for the number of distribution territories.

³ Based on EACEA admissions data. Including non-EU territories that participated in the programme. This comprises 45.8 million admissions for all films from high PCCs, 12.0 million admissions for all films from medium PCCs, and 1.0 million admissions for all films from low PCCs.

Names of the schemes as in the Programme data	Annual average amounts awarded under MEDIA 2007 (EUR million)	Annual average amounts awarded under (CE) MEDIA at mid-term (EUR million)	Key results per scheme
			<p>(and a total of 280) in the period 2014 to 2016.</p> <p>Creative Europe supported 47% less unique⁴ titles/films than the MEDIA predecessor programmes (23 titles less on average per year)</p> <p>49 unique titles/films supported per year (or a total of 343) in the period 2007 to 2013;</p> <p>26 titles/films supported per year (or a total of 78) in the period 2014 to 2016.</p> <p>Groupings under Creative Europe's Distribution Selective scheme have become bigger than under the predecessor MEDIA Programme (i.e. 22.8 distributors per grouping as opposed to 19.9 distributors per grouping respectively)⁵.</p> <p>Films supported by Cinema Selective under Creative Europe are estimated to have received an average of 11.5 million admissions per year (or a total of 34.4 million admissions in the period 2014 to 2016. This is 23% less on average per year than under the predecessor programme (104.1 million in total or 14.8 million yearly in the period 2007-2013). The reduction in the admissions (-23%) corresponds to the reduction of projects (-23%) and is not compensated by 6% of increase in the average size of a project, compared to predecessor.</p> <p>However, cost per one admission generated by Cinema Selective scheme is 6% (i.e. 7 cents EUR) lower under the current MEDIA programme (€1.12) compared to the predecessor Programme (€1.19).</p>

⁴ The same title / film can be distributed by more than one grouping across different territories.

⁵ For the Cinema Selective each distributor is linked to a particular country i.e. distribution territory, so the average number of distributors per project is the same as the average number of distribution territories.

Names of the schemes as in the Programme data	Annual average amounts awarded under MEDIA 2007 (EUR million)	Annual average amounts awarded under (CE) MEDIA at mid-term (EUR million)	Key results per scheme
TV Broadcasting / TV Programming	11.3	13 (15% increase in annual budget compared to MEDIA Predecessor Programme)	<p>As shown in Table A3.1, the average cost per projects for this scheme increased by 38% between the two programming period.</p> <p>Creative Europe supported on average 17% (or 11) less projects than the MEDIA predecessor programme per year:</p> <p>66 projects on average per year (or a total of 463 projects) in the period 2007 until 2013;</p> <p>55 projects on average per year (or a total of 165 projects) in the period 2014 to 2016⁶.</p> <p>Creative Europe funding supported less distributors and co-producers per project than the MEDIA predecessor Programme an average of 73 distributors and 93 co-producers per year 2007 until 2013;</p> <p>an average of 61 distributors per year and 77 co-producers per year from 2014 until 2016.</p> <p>The support per unique company increased under the current MEDIA by 7% (or €18,880) on average (from €259,271 under the predecessor Programme to €278,151 under Creative Europe).</p> <p>Creative Europe funding allowed the distribution of TV programmes funded to more non-national markets than the predecessor MEDIA Programme (based on the sample of 44 projects mapped and funded between 2010 and 2014):</p> <p>Supported TV programmes were distributed to an average of 6.2 non-national markets in 2014;</p> <p>Supported TV programmes were</p>

⁶ For the TV scheme the cost per project is the same as cost per unique title (as 1 project = 1 title), hence there was an equivalent decrease in the number of unique titles supported.

Names of the schemes as in the Programme data	Annual average amounts awarded under MEDIA 2007 (EUR million)	Annual average amounts awarded under (CE) MEDIA at mid-term (EUR million)	Key results per scheme
			<p>distributed to an average 6 non-national markets in from 2010 to 2013.</p> <p>TV programmes funded under Creative Europe achieved a slightly lower IMDB rating than the MEDIA predecessor programme (based on the sample of projects mapped) (i.e. an average of 7 v. 7.2). In general, the higher the total cost of the TV programmes the higher the IMDB rating. (based on the sample of 44 projects mapped and funded between 2010 and 2014)</p> <p>TV programmes funded under Creative Europe involved more broadcasters per action than the MEDIA predecessor programme – i.e. 7.8 vs 6.4 (based on the sample of 44 projects mapped and funded between 2010 and 2014). This has the potential to increase the audience for non-national films in Europe.</p>
Development - Single Projects	7.7	6.1 (-20% decrease in annual budget compared to MEDIA predecessor Programme)	<p>As shown in Table A3.1, the average cost per projects for this scheme increased by 2% between the two programming periods.</p> <p>The scheme funded 22% less projects / films⁷ under Creative Europe than under the predecessor MEDIA Programme. Creative Europe funded 150 projects per year on average while the MEDIA Predecessor Programme funded 193 projects a year on average.</p> <p>Similarly an average of 159 unique companies a year were supported under the predecessor Programme and 132 unique companies under Creative Europe's MEDIA Sub-programme⁸ (i.e.</p>

⁷ For Single Projects each project focuses on the development of one title/film.

⁸ This number is in all likelihood a relatively precise estimate, however, not a precise number. The Programme data had to be manually cleaned as the same company was sometimes spelled a bit differently (e.g. L.T.D vs. LTD). A judgement had to be made in some cases whether the name refers to the same company (as company names may have changed as recorded by the EACEA over the years to some degree). Hence, a

Names of the schemes as in the Programme data	Annual average amounts awarded under MEDIA 2007 (EUR million)	Annual average amounts awarded under (CE) MEDIA at mid-term (EUR million)	Key results per scheme
			<p>17% or 27 unique companies less per year on average).</p> <p>The average number of partners per project across the two periods was 1.8.</p> <p>Under Creative Europe, 30% of projects supported during their development phase went into production as opposed to 50% under MEDIA predecessor Programme. It is likely that the share for the current Programme will increase as a large share (84%⁹) of Single development projects is still ongoing.</p> <p>Under Creative Europe in 2014, 100% of projects funded led to the full development of the AV works as opposed compared to under MEDIA predecessor programme where a maximum of 75% of project under led to the development of AV works (based on a sample of 82 projects in 2010, 2011, 2012 and 2014).</p> <p>Under Creative Europe in 2014, 80% of projects funded led to the full production of the AV works as compared to under MEDIA predecessor programme where a maximum of 60% of the project supported led to the production of AV works (based on a sample of 82 projects in 2010, 2011, 2012 and 2014).¹⁰</p> <p>While it is too early to produce comparable figures for the current Programme, for predecessor MEDIA the average investment per film produced with the support of Single Projects scheme is estimated at €130,000 and investment per film that made it to the market at €190,000.</p>
Developm	10.2	12.3	As shown in Table A3.1, the average

unique beneficiary of this scheme may have benefited from the support of the scheme also in a different year of the same programming period (but would still be counted as one beneficiary in this analysis).

⁹ According to the results of the MEDIA survey

¹⁰ FE on MEDIA Development schemes

Names of the schemes as in the Programme data	Annual average amounts awarded under MEDIA 2007 (EUR million)	Annual average amounts awarded under (CE) MEDIA at mid-term (EUR million)	Key results per scheme
ent - Slate Funding		(20% increase in annual budget compared to MEDIA Predecessor Programme)	<p>cost per projects for this scheme increased by 12% between the two programming periods. Slightly more projects (8% or 5 projects) per year were funded under Creative Europe (75) than under the predecessor MEDIA Programme (70).</p> <p>Creative Europe supported 13% more films per year on average than the predecessor programmes. This is because the average number of films per slate increased from 3.7 under the predecessor to 3.9 under the current Programme and also due to the 12% increase (€17,250 more) in the average grant for project supported (from €145,792 under MEDIA 2007 to €163,045 under Creative Europe).</p> <p>The predecessor Programme supported on average of 259 films per year;</p> <p>The current Creative Europe Programme supports 294 films per year via Slate Funding scheme; the average cost per film has increased by 6% or €2,400 from €39,403 under the predecessor MEDIA to €41,807 under Creative Europe.</p> <p>Slate Funding scheme supported on average of 50 unique companies per year under the predecessor Programme and 67 unique companies under Creative Europe (based on Programme data). This represents 34% increase in the number of unique companies supported by the scheme. The average cost per unique company supported has decreased by 11% (or around €21,630) from €205,873 under the predecessor to €184,241 under Creative Europe.</p> <p>Under Creative Europe in 2014, 70% of projects funded led to the full development of the AV works. When compared to the MEDIA Predecessor an average of 72% projects led to the full</p>

Names of the schemes as in the Programme data	Annual average amounts awarded under MEDIA 2007 (EUR million)	Annual average amounts awarded under (CE) MEDIA at mid-term (EUR million)	Key results per scheme
			<p>development of AV works. The maximum figure in any given year was 79% of projects under the MEDIA predecessor programme led to the development of AV works (based on a sample of 67 projects in 2010, 2011, 2012 and 2014).</p> <p>Under Creative Europe in 2014, 54% of the works supported went into full production as compared 39% to under MEDIA predecessor Programme.</p> <p>Overall, the number of films supported by Slate Funding scheme per year that were produced increased by 33% compared to MEDIA 2007 (from 113 to 150 per year on average), while the average programmes' cost / investment per film produced decreased by 9% (or €8,500) from €90,428 under predecessor to €81,885 under Creative Europe.</p> <p>While it is too early to produce comparable figures for the current Programme, for predecessor MEDIA the average investment per film that entered the market with the support of the Slate Funding scheme is estimated at €178,595 (compared to an average of €190,000 for Single Projects).</p>
VOD / Online distribution	5.4	5.6 (4% increase in annual budget compared to MEDIA predecessor Programme)	<p>As shown in Table A3.1, the average cost per projects for this scheme decreased by 19% between the two programming periods.</p> <p>On average the current Online distribution scheme supports 28% (4 projects) more each year under Creative Europe (19 on average), compared to the annual average (15) of the predecessor Programme.</p> <p>The predecessor Programme scheme funded DVD catalogues with an average proportion of 28% of national films whether the VOD scheme funded Online</p>

Names of the schemes as in the Programme data	Annual average amounts awarded under MEDIA 2007 (EUR million)	Annual average amounts awarded under (CE) MEDIA at mid-term (EUR million)	Key results per scheme
			<p>Distribution Platforms with an average of less than 23% of national films.</p> <p>Creative Europe supported 63% more unique companies (online distributors) per year than under the MEDIA predecessor Programme (i.e. respectively 8 vs. 5 per year). In total the predecessor Programme supported 33 unique companies in the period 2007-2013, the current one 23 unique companies in the period 2014-2016.</p> <p>The average cost per unique company supported decreased on average by around €400,000 or 36% in the current Programme compared to MEDIA 2007.</p> <p>There is no breakdown of how the numbers of registered users/subscribers have developed across the programme periods¹¹. If the total programmes' spending on this scheme across the period 2007-2016 (€54.2 million) is divided by the number of registered users/subscribers in 2016 to the supported platforms, the average cost per user/subscriber is €41.4.</p>
Training	8.2	7.8 (-4% decrease in annual budget compared to MEDIA Predecessor Programme)	<p>As shown in Table A3.1, the average cost per projects for this scheme decreased by 1% between the two programming periods.</p> <p>Slightly less projects (-4% or 2 training projects per year) were funded under Creative Europe than under the predecessor MEDIA programme. In the period 2014-2016 Creative Europe supported 57 training projects per year compared to 59 under the MEDIA Predecessor programme.</p> <p>Creative Europe supported 7% less participants per year compared to predecessor MEDIA training (2,067 on</p>

¹¹ Only 2016 statistics on VOD platforms were communicated to the evaluators. No comparisons could be made with similar statistics under the predecessor Programme and hence were not exploited in this section.

Names of the schemes as in the Programme data	Annual average amounts awarded under MEDIA 2007 (EUR million)	Annual average amounts awarded under (CE) MEDIA at mid-term (EUR million)	Key results per scheme
			<p>average per year under MEDIA 2007 and 1,919 on average during the first two years of Creative Europe).</p> <p>The cost per participant increased very slightly (by 0.5% or €19 euros) under the current MEDIA Sub-programme (€4,130) compared to the MEDIA predecessor Programme (€4,111).</p>

Source: Programme data, FEs on key MEDIA schemes

The evidence of the relative performance when it comes to the efficiency of projects funded under the Culture predecessor Programme and the Creative Europe Culture Sub-programme is presented in Table A3.6.

Table A3.6 Overview table – amounts awarded and key results - for some Culture scheme(s)

Names of the schemes as in the Programme data	Annual average amounts awarded under predecessor or Culture (EUR million)	Annual amount awarded Culture (CE) at mid-term (EUR million)	Results
Multi-annual Cooperation Projects / Cooperation Projects - Large scale and Small scale Cooperation Measures / Large and Small European Cooperation projects	36.6	38.4 (5% increase in annual budget compared to Culture predecessor Programme)	<p>As shown in Table A3.2, the average cost per projects for this scheme increased by 67% (or € 219,697) from € 325,775 under predecessor to € 545,472 under Creative Europe.</p> <p>The number of projects supported each year however decreased by 37% (or 42 projects less each year): 112 projects on average under predecessor Culture and 70 under Creative Europe per year.</p> <p>Under Creative Europe, the projects have been delivered by lead applicants from 25 countries (including 3 non-EU countries) and partners from 36 countries (including 8 non-EU countries). Under the Culture predecessor programme The projects were delivered by lead applicants from 32 countries (including 5 non-EU countries) and partners from 39 countries (including 11 non-EU countries).</p> <p>Under Creative Europe, the projects supported the transnational mobility of on average 1,363 CC players per project (total of 17,723); considerably more than among sample of mapped reports under the predecessor programme (i.e. 273 per project).</p> <p>In terms of audience reached, predecessor Cooperation projects are estimated to have reached 8.8 million people (1.26 million per year on average) while the current projects, many of them still ongoing (82%¹²) are estimated to have already reached three million people</p>

¹² Based on the results of the Culture survey

Names of the schemes as in the Programme data	Annual average amounts awarded under predecessor or Culture (EUR million)	Annual amount awarded Culture (CE) at mid-term (EUR million)	Results
			<p>(1 million per year on average), including 55% youth.</p> <p>This (total grants / by total reach) produces the overall cost per person reached at €29 for the predecessor Cooperation projects and €38 for the Creative Europe Cooperation projects (the cost per person reached is likely to decrease for the current Programme as more projects are completed and have reported their total achieved reach).</p> <p>The average size of the programmes allocation per unique operator supported has increased by 40% from € 72,292 under predecessor Culture to € 101,316 under Creative Europe.</p> <p>Based on the sample of 30 projects conducted in 2008 and 2014, the following cost-effectiveness ratios were calculated:</p> <p>The average cost per project in 2008 and 2014 were EUR 564,000 in 2008 and EUR 589k in 2014</p> <p>The average number of activities implemented per action were 257 in 2008 and 206 in 2014</p> <p>The average cost per activity implemented was EUR 2,193 in 2008 and EUR 2,858 in 2014</p> <p>The average cost per number of partners involved in the cooperation was EUR 85,600 in 2008 and EUR 103,500 in 2014</p> <p>The average cost per audience reached was EUR 50 in 2008 and EUR 0.50 in 2014</p> <p>The average cost per mobile creative and culture sector players was EUR 2536 in 2008 and EUR 423 in 2014.</p> <p>Drawing from the above, the efficiency in delivering the outputs has decreased in 2014 compared to 2008, the cost</p>

Names of the schemes as in the Programme data	Annual average amounts awarded under predecessor or Culture (EUR million)	Annual amount awarded Culture (CE) at mid-term (EUR million)	Results
			<p>efficiency in generating impact has significantly increased. This can be explained by the policy choice to focus on audience development and mobility of cultural players, which increased the cost of activities and of the actions but also increased their impacts.</p> <p>In terms of effectiveness of implementation, about 93% of projects supported in 2014 have been implemented as expected¹³</p> <p>Smaller-scale projects, with expenses of €250,000-€350,000, registered 10-70 implemented activities each (with one outlier at 163), while the three larger-scale projects with higher budgets all registered over 200 activities each.</p>
European Networks (incl. advocacy)	2.3	7.5 (227% increase in annual budget compared to Culture predecessor Programme)	<p>As shown in Table A3.2, the average cost per projects for this scheme increased by 327% between the two programming periods (or by € 254,326 per project on average) from € 77,830 per project under the predecessor Culture Programme to € 332,155 under Creative Europe.</p> <p>Overall 23% less network projects are supported under the current programme: on average 23 Network projects under Creative Europe compared to an average of 30 under predecessor Culture.</p> <p>Hence there is a smaller number of Network projects funded and higher budget for the scheme and higher average budget for the Network projects.</p>
European Platforms	NA (support for Platforms' projects)	5.4	<p>As shown in Table A3.2, the average cost per Platform project was € 736,722.</p> <p>The average cost per person reached was €69 (€16.2 / by total estimated</p>

¹³ Based on a sample of 13 projects from 2014

Names of the schemes as in the Programme data	Annual average amounts awarded under predecessor or Culture (EUR million)	Annual amount awarded Culture (CE) at mid-term (EUR million)	Results
	only started with Creative Europe)		reach of 234,600 people).
Literary Translation / Literary Translation – Annual and Multi-Annual / LIT 2	2.5	3.9 (58% increase in annual budget compared to Culture predecessor Programme)	<p>As shown in Table A3.2, the average cost per project for this scheme increased by 124% between the two programming periods (average increase of € 33,652 per project) from an average of € 27,070 under predecessor to € 60,722 under Creative Europe per project.</p> <p>30% fewer translation projects were supported (27 projects less each year): 92 under predecessor Culture and 64 under Creative Europe per year.</p> <p>The scheme under Creative Europe achieved 29% more translations per project per year than under the predecessor Culture Programme (e.g. 7.2 vs. 3.9)</p> <p>The average amount awarded per translation was 18% more expensive under Creative Europe than under the predecessor Culture Programme (EUR 8400 vs EUR 6,900 on average).</p> <p>The average Programme investment per book sold was €5.98 under predecessor Culture and €8.37 under Creative Europe.</p> <p>The projects funded under the scheme sold 18% more books under Creative Europe than under the Culture Programme 2007-2013 (i.e. an average of 366,000 and 300,000 books sold per year respectively).</p>

Source: Programme data, FES on key Culture schemes

Table A3.7 below contains headlines indicators useful to assess the size of the Creative Europe programme compared to the market.

Table A3.7 Comparison of CCS market and supported CCS entities

	CSS Market	Creative Europe	Proportion of entities, jobs, ... supported as compared to the European CCS market
Public funding contribution to the sector	€79 million (Yearly average 2008 to 2013) €81 million a year (2014 figure)	EUR 1.13 billion from 2007 until 2013 (€758 million for MEDIA and €361 million for Culture) or €161 million a year EUR 514 million for the first 3 years (€317 million for MEDIA and €180 million for the Culture sub-programmes)	The funding from the predecessor programmes represents approx. 0.2% of the overall public funding of the sector from 2007 till 2013 The funding from the predecessor programmes represents approx. 0.2% of the overall public funding of the sector in 2014
Number of companies	138,246	6,700 entities supported via the predecessor programmes (3,000 in the audiovisual sector and 3,700 in the Culture sector) 2,580 entities supported via Creative Europe (1300 in the audiovisual sector and 1,200 in the Culture sector)	2.2% of the entities (for the AV sector) supported by the MEDIA predecessor programme 1.8% of the entities (for the AV sector) supported by the MEDIA sub-programme as part of Creative Europe
Employment in the sector	5.75 million employees on average from 2008 to 2013 6.37 million employees on average from 2014 to 2015	7000 employment positions maintained and or created for the predecessor programme 3000 employment maintained and or created as part of Creative Europe	0.12% of employment in the sector from 2007 till 2013 0.05% of employment in the sector from 2014 till 2015

Source: Eurostat, ICF surveys

Table A3.8 below presents the overall management costs for Creative Europe and the predecessor programmes.

Table A3.8 Management costs of Creative Europe and predecessor programmes

	Creative Europe	Predecessor Programmes	% variation
Yearly operational expenditure	EUR 159 million	EUR 156 million	+ 2%
Yearly administrative expenditure	EUR 12.8 million	EUR 12.5 million	+ 2.4%
Amount of operational expenditure for EUR 1 of administrative expenditure	EUR 12.4	EUR 12	+ 3.3%
Level of human resources dedicated to the Programmes	127 FTE	99 FTE	+28%
Amount of operational expenditure for 1 programme FTE	EUR 1.25 million	EUR 1.6 million	21.8%
Average programme costs for 1 application	EUR 49	EUR 55.3	11.4%
Average programme cost per project	EUR 63,604	EUR 60,128	+ 5.8%
FTE per 100 applications	3.92	3.51	+ 11.7%
FTE per 100 projects	5.09	3.81	+ 33%

Source: Programme data



Publications Office

Annex 4 List of key informant interviews undertaken

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Annex 4 List of key informant interviews undertaken

A total of 103 stakeholder interviews¹ were conducted for this evaluation. The breakdown of interviews conducted is as follows:

National level (62 interviews completed):

- 13 with national-level policy makers (e.g. ministry representatives) in 11 countries
- 23 with Creative Europe Desks (both MEDIA and Culture) in 15 countries
- 19 with national-level AV/Culture sector organisations in 12 countries
- 7 with national-level AV/Culture funding organisations in 5 countries

EU level (38 interviews completed):

- 26 with EU-level AV/Culture subsector organisations
- 12 with European Commission and EACEA officials

European and international level: three interviews completed with other wider European or international organisations.

The lists of interviewees are presented in the tables below.

Table A4.1 National policy makers

Country	Organisation	Interviewee
Bulgaria	Ministry of Culture	Axenia Boneva
Denmark	The Danish Ministry of Culture	Anne Julie Schmitt
France	Ministry of Culture and Communication	Aline Denis
Germany	Federal Government Commissioner for Culture and the Media	Els Hendrix
Germany	Federal Government Commissioner for Culture and the Media	Elisabeth Gorecki-Schöberl
Ireland	Department of Arts, Heritage, Regional, Rural and Gaeltacht Affairs	Therese O'Connor*
Italy	Ministry for Heritage, Cultural Activities and Tourism	Leila Nista**
Latvia	Ministry of Culture	Laura Turlaja
Luxembourg	Ministry of Culture	Barbara Zeches
Netherlands	Ministry of Education, Culture and Science	Maarten C.D. Mulder
Portugal	Ministry of Culture	Dr. Lurdes Camacho
Slovenia	Ministry of Culture	Urška Zupanec
Slovenia	Ministry of Culture	Irena Ostrouska

*Also interviewed as culture sector representative

**Also interviewed as CED Culture representative

Table A4.2 Creative Europe Desks

Country	Organisation	Interviewee
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¹ Five stakeholders were interviewed in different capacities

Annex 4 List of key informant interviews undertaken

Bosnia and Herzegovina	Association AKCIJA (Culture CED)	Aida Kalender
Bosnia and Herzegovina	Association VizArt (MEDIA CED)	Zoran Galic
Bulgaria	Ministry of Culture (Culture CED)	Vesela Kondakova
Bulgaria	National Film Center (MEDIA CED)	Kamen Balkanski*
Denmark	Danish Film Institute (MEDIA CED)	Ene Katrine Rasmussen
France	Relais-Culture-Europe (MEDIA/Culture CED)	Laurence Barone
Germany	Kulturpolitische Gesellschaft e.V (Culture CED)	Sabine Bornemann
Germany	Kulturpolitische Gesellschaft e.V (MEDIA Berlin-Brandenburg Desk)	Susanne Schmitt
Ireland	Arts Council Ireland (Culture CED)	Katie Lowry Audrey Keane
Ireland	MEDIA Office Dublin	Orla Clancy
Italy	Ministero dei beni e delle attività culturali e del turismo (Culture CED)	Leila Nista
Italy	Istituto Luce Cinecittà srl (MEDIA CED)	Enrico Bufalini
Latvia	Ministry of Culture (Culture CED)	Zanda Aveniņa Andrejs Lūkins
Latvia	National Film Centre (MEDIA CED)	Lelda Ozola
Luxembourg	Agence luxembourgeoise d'action culturelle (Culture CED)	Marie-Ange Schimmer**
Luxembourg	Film Fund Luxembourg (MEDIA CED)	Carole Kremer
Netherlands	DutchCulture / Centre for international cooperation (MEDIA/Culture CED)	Klaartje Bult / Andrea Posthuma
Norway	Norwegian Film Institute (MEDIA CED)	Benedikte Danielsen
Poland	Adam Mickiewicz Institute (MEDIA/Culture CED)	Małgorzata Kielkiewicz Katarzyna Zalewska Julia Płachecka
Portugal	Centro de Informação Europa Criativa (MEDIA/Culture CED)	Manuel Claro Susana Costa Pereira
Slovenia	MOTOVILA, Centre for the promotion of cooperation in the cultural and creative sectors (MEDIA/Culture CED)	Mateja Lazar Sabina Briški
United Kingdom	British Film Institute (MEDIA CED)	Agnieszka Moody
United Kingdom	Creative Scotland (Culture CED)	Kate Deans

**Also interviewed as AV sector representative*

***Also interviewed as culture sector representative*

Table A4.3 Organisations representing the sector on the national level

Country	Organisation	Interviewee
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Annex 4 List of key informant interviews undertaken

Bulgaria	National Film Center	Kamen Balkanski
Denmark	The Danish Film Institute	Claus Noer Hjort
Denmark	The Danish Agency for Culture	Bradley Allen
France	Centre national de la cinématographie et de l'image animée (CNC)	Julie-Jeanne Régnauld
France	Artcena - Centre national des Arts du cirque, de la rue et du théâtre	Stéphane Segreto-Aguilar
Germany	German Federal Film Board (FFA)	Peter Dinges
Germany	Goethe Institute	Antonia Blau
Ireland	Irish Film Board	James Hickey
Ireland	Culture Ireland	Thérèse O'Connor
Italy	Editrice Il Sirente Società Cooperativa	Chiarastella Campanelli
Latvia	State Culture Capital Foundation (SCCF)	Linda Karlina*
Luxembourg	Agence luxembourgeoise d'action culturelle	Marie-Ange Schimmer
Norway	Arts Council Norway	Anne Aasheim
Poland	Polish Film Institute	Katarzyna Mazurkiewicz
Slovenia	Slovenian Film Centre	Nerina T. Kocjančič
UK	British Film Institute (BFI)	Carol Comley
UK	Creative England	Caroline Norbury
UK	Arts Council England	Richard Russell
UK	Creative Scotland	Scott Donladson

**Also interviewed as national funding organisation representative*

Table A4.4 National funding organisations

Country	Organisation	Interviewee
France	Centre national du cinéma et de l'image animée CNC	Julie-Jeanne Régnauld
France	The French Institute for the Financing of Cinema and Cultural Industries (IFCIC)	Sébastien Saunier Géraldine Segond
Latvia	State Culture Capital Foundation (SCCF)	Linda Karlina
Netherlands	Netherlands Film Fund	Doreen Boonekamp
Netherlands	Performing Arts Fund	Julia Terlunen
Norway	Norwegian Film Institute	Live Nermoen
UK	British Film Institute	Ben Roberts

Table A4.5 EU Commission and the EACEA officers

Organisation	Interviewee	Unit
DG EAC	Ingveig Astad	Dir. D: Culture and Creativity; Unit 2
DG EAC	Silvia Calbi	Dir. D: Culture and Creativity; Unit 2
DG EAC	Gloria Lorenzo Leronés	Dir. D: Culture and Creativity; Unit 2
DG EAC	Sylvain Pasqua	Dir. D: Culture and Creativity; Unit 2
DG EAC	Marc Vanderhaegen	Dir. D: Culture and Creativity; Unit 2
DG CONNECT	Niombo Lomba	Dir. G: Media and Data; Unit 6: Media Support Programmes
DG CONNECT	Maciej Szymanowicz	Dir. G: Media and Data; Unit 6: Media Support Programmes
DG CONNECT	Isabella Tessaro	Dir. F: Digital Single Market Unit 3: Start-ups and Innovation
EACEA	Katharina Riediger	Dir. B1: Creative Europe: Culture
EACEA	Emmanuel Cocq	Dir. B2: Creative Europe: MEDIA
EACEA	John Dick	Dir. B2: Creative Europe: MEDIA
EACEA	Virve Indren	Dir. B2: Creative Europe: MEDIA

Table A4.6 EU subsectors organisations

Organisation	Interviewee
CINEMATEK	Nicola Mazzanti
Europa Cinemas	Claude-Eric Poiroux
International Federation of Film Producers Associations	Benoît Ginisty
La société civile des auteurs-réalisateurs-producteurs	Florence Gastaud
European Game Developers Federation (EGDF)	Malte Behrmann
European Coordination of Independent Producers (CEPI)	Elena Lai Jose Valls
Network of European Museum Organisations (NEMO) (funded by EC)	Julia Pagel
Europa Nostra - citizens' movement for the safeguarding of Europe's cultural and natural heritage (supported under 'networks' scheme)	Sneška Quaedvlieg-Mihailović
European Music Council (EMC) (supported under 'networks' and 'cooperation projects - small scale' schemes)	Simone Dudt
IMPALA (independent music companies association)	Helen Smith Mathieu Philibert

Annex 4 List of key informant interviews undertaken

Film New Europe	Anna Franklin
TeH Trans Europe Halles (formerly funded by the EC)	Birgita Persson
FACE Fresh Arts Coalition Europe (Street Arts. A recent network, has not received EC funding)	Yohann Floch Ariane Bieou
IETM (network of performing arts organisations and individuals) (supported under 'networks' scheme)	Nan Van Houte
PEARLE – Performing Arts Employers Association League Europe	Anita Debaere
Federation of European Publishers (FEP)	Henrique Mota Rudy Vanschoonbeek
EuroVoD	Jean-Yves Bloch
Europa Distribution (supported under 'Access to Markets' scheme)	Christine Eloy
Europa International	Daphne Kapfer
European Film Agency Directors	Samuel Young
Federation of European Film Directors	Pauline Durand-Vialle
International Federation of Film Distributors' Associations (FIAD)	Jelmer Hofkamp
International Union of Cinemas	Jan Runge
European Choral Associaton	Sonja Greiner
ADCE - Arts Directors Club of Europe (EC funded)	Amir Kassaei
International Video Federation	Charlotte Lund Thomsen

Table A4.7 European and international organisations

Organisation	Interviewee
EUNIC	Andrew Murray
European Cultural Foundation	Katherine Watson
Europa Nostra	Sneška Quaedvlieg-Mihailović

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