



QUALITATIVE STUDY ON THE PLACE OF FEMALE DIRECTORS IN EUROPE

SYNTHESIS - 2023

IN COLLABORATION WITH:



WITH THE SUPPORT OF THE LAB FOUNDING BENEFACTOR:

F O N D A T I O N

Sisley-d'Ornano

IN PARTNERSHIP WITH:

Soutenu par



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The complete study is available on www.femmesdecinema.org

ABOUT THE LAB FEMMES DE CINÉMA

The Lab Femmes de Cinéma is a unique place for reflection and elaboration on parity and mixity in the audiovisual industry and in European cinema.

Created in 2017, the Lab Femmes de Cinéma is a place for meetings and exchanges between people representing the entire cinema chain and mobilized by the challenge represented by parity and diversity in the European cinematographic landscape. Its ambition is to generate ideas, propose actions and stimulate experimentation, in order to make a change.

The Lab Femmes de Cinéma annually updates its study initiated by Les Arcs Film Festival on the place of women directors in Europe, and organizes workshops, masterclasses and podcasts.

The Fondation Sisley d'Ornano is the founding sponsor of Lab Femmes de Cinéma, STUDIOCANAL, the French Ministry of Culture, the CNC, TITRA FILM, Audiens and the Collectif 50/50 are its partners.

I. INTRODUCTION TO THE LAB STUDY

This study was made by the **Lab Femmes de Cinéma**. This is its seventh and this is its eighth update.

Let us recall first and foremost the global context in which this study was realised: today, on average in Europe, only **one out of four directors are women**. Different studies show that women in cinema are still, on average, underpaid, given fewer grants, and are less programmed than their male counterparts, and female characters are still often stereotyped. Cinema plays an important role in shaping our collective imagination: **it participates in the construction of society at the same time it reflects it**.

If women are underrepresented and discriminated against in cinema, it is in part because of the **gender stereotypes and structural exclusion mechanisms that are still in place**. In order to overcome these two barriers, we know that there is in-depth work that has to be done. We must deconstruct the stereotypes and shine more light on women filmmakers. We must also **put in place more proactive structural movements**. This study aims to detail and present the policies and measures adopted to improve on the persisting inequalities, and to promote the place of women and marginalised people in cinema in every European country.

It is within this context that since 2016 the association **Révélation Culturelles** realises an annual study on the place of female directors within European cinema. Since 2020, we rely on the statistics given by our partner **European Audiovisual Observatory (EAO)**. We therefore focus on purely data-driven work.

We are also in collaboration with the **European Film Agency Directors Association (EFAD)**, the association that brings together national film and audiovisual agencies from European countries. The EFAD¹ put us in touch with the national cinema agencies of its member states and who re-read this study before sharing it with its members. The French Ministry of Culture has also been supporting us since 2022, and the French CNC since 2023.

¹ EFAD membership covers the European Union countries as well as Iceland, Norway, the Republic of North Macedonia, Montenegro, Serbia, Switzerland, the United Kingdom, Ukraine and Bosnia and Herzegovina.

This study is **an example of European collaboration** on subjects that need regular monitoring. Indeed, it is crucial that we examine, every year, countries' numbers and policies to measure whether change does indeed take place in the sector. Naturally, we must consider the **double temporality** between:

- Our qualitative study which examines measures that will affect the statistics in the coming years;
- The quantitative study by the EAO which pertains to a period that has ended and whose statistics are the result of measures previously put in place.

With this study, we wish to contribute to the movement that aims **to raise awareness** for the place of women in cinematographic creation sectors. By annually contacting different European film institutes we are also encouraging them **to evaluate in concrete terms the measures they put in place to promote equality** while adopting a reflexive look onto their own policies, by comparing them to those that already exist in Europe.

This study pertains to about **thirty European countries**. To each of these countries, we sent a certain number of questions to different film institutes (see methodological point). The information presented in this study is formed either from their answers or, for the countries who declined our questions, from a summary of the data we collected from their institutional websites.

We must note that the measures adopted by countries are not always comparable due to the countries' economic, political, social, and cultural differences. Furthermore, cinema does not necessarily have the same importance in each of the countries studied.

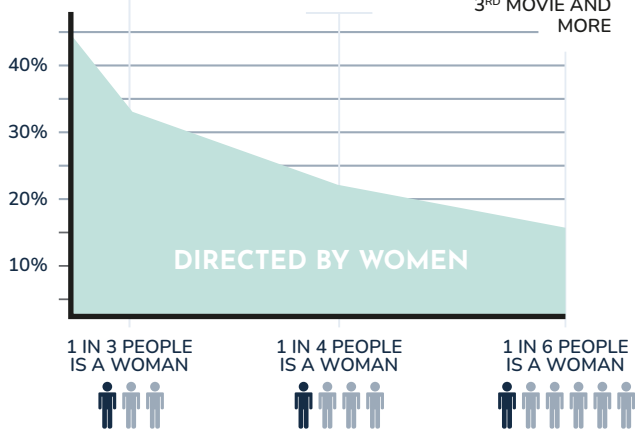
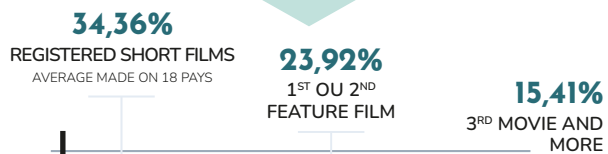
By presenting a synthesis of all the policies aimed at inclusion in Europe, we are able every year, thanks to this study, to catalog the measures that are experimented with which aim to try and increase opportunities and inclusion in cinema. It is therefore as much an annual assessment as it is a collection of good practices.

Our goal is for this study to be seen by as many people as possible, so do not hesitate to share it and use its data. We simply request that you cite your source (*Study of the Lab Femmes de Cinéma*) and that you notify us at contact@femmesdecinema.org.

KEY FIGURES OF THE PLACE OF WOMEN DIRECTOR IN EUROPEAN CINEMA

DATA PROVIDED BY THE LAB

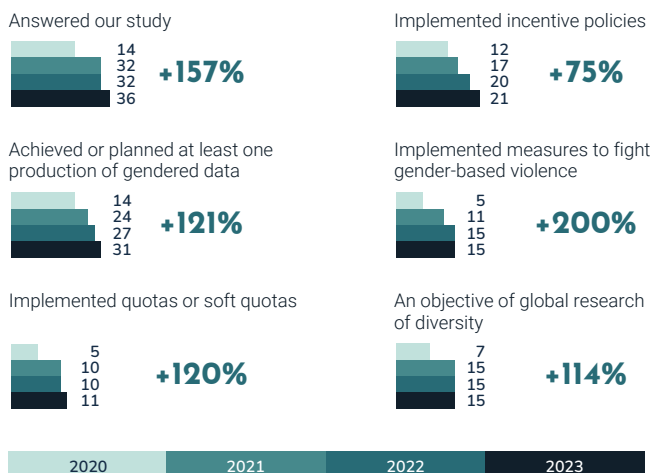
REMINDER OF THE FIGURES OF THE 2019 STUDY PUBLISHED BY THE LAB



Women, who make up 50% of film school students, are gradually being driven out of the industry. They face a number of discriminatory barriers that make it harder for them to establish themselves in the industry over the long term.

COMPARAISON OF THE RESULTS OF THE LAB STUDY 2020-2023

NUMBER OF COUNTRIES THAT HAVE :



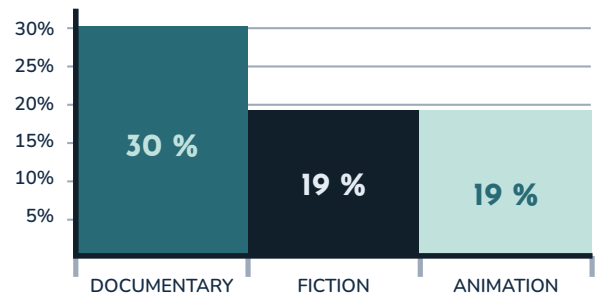
The significant increase in the number of countries responding to our requests means that the themes of parity and gender diversity are:

- addressed politically each year by a greater number of countries,
- addressed in greater depth by those who had begun working on these subjects earlier.

DATA PROVIDED BY THE EAO

THE PROPORTION OF WOMEN FILMMAKERS DIRECTING FEATURE FILM IN EUROPE

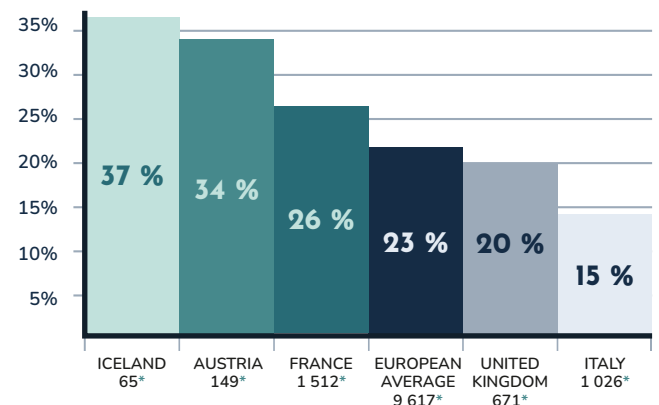
2018-2022 - Figures provided by the EAO



Women directors are proportionally more present in documentary films, where the average film budget is much lower than the average budget for animated or fiction films. Beyond the question of the share of women directors in Europe, there is also the question of the low share of total budgets allocated to them.

SHARE OF FILMS BY WOMEN DIRECTOR

2018-2022 - Figures provided by the EAO



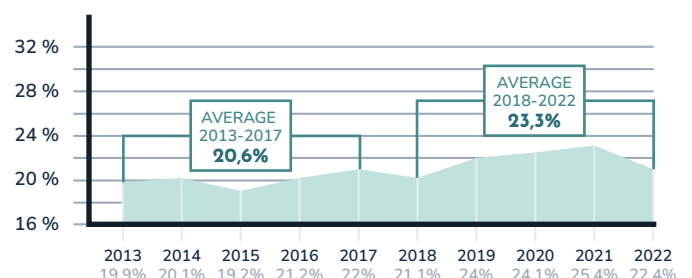
*number of feature films produced between 2018 and 2023

The countries with the best statistics are those that adopted the most ambitious and multidisciplinary policies to promote greater equality in cinema some years ago, but the best statistics are still a long way from parity.

EVOLUTION OF THE SHARE OF FILMS BY WOMEN DIRECTORS*

2013-2022 - Figures provided by the EAO

* including co-productions including at least one woman director



Between 2013 and 2022, the European average for the share of films by female directors rose from 19.9% to 22.4%: if statistics continue to evolve at this rate, we'll have to wait until... 2080 to reach parity.

III. HIGHLIGHTS

Growing participation in an increasingly recognised study

This year, we contacted 37 countries², 36 of which responded to our questions. This is an increasing response rate, in line with recent years (32 responses in 2022 and 2021, 14 in 2020). In 2023, only Albania³ did not respond to our requests. Responding to our requests enables the various institutes to take a reflective look at their own measures to promote parity. The majority of the Centres contacted recognise the importance of this study (70% say it is "very useful" or "extremely useful").

Countries committed to parity and taking action

In 2023, the vast majority of European countries are committed, at various levels, to parity in the film industry: only 5 countries have not introduced or do not plan to introduce measures to promote parity in their industry (Bosnia and Herzegovina, Bulgaria, Serbia, Slovakia and Ukraine⁴).

A total of 35 countries have introduced or plan to introduce measures to promote parity. Among them are those that have been involved in these issues for a long time, continuing and deepening their work over the long term (like Austria, Denmark, Iceland, Norway, Sweden, etc.) and those that have joined the movement more recently. No fewer than 10 countries have launched, or plan to launch in the next few years, their first collection of gendered data. Collecting data is one of the first steps towards quantifying inequalities in the sector, and therefore a form of awareness-raising that generally leads to declarations of intent and the implementation of measures to promote gender diversity in the industry.

Several highlights emerge from our 2023 study

- Some of the major trends are a continuation of our 2022 study:
 - integrating parity into an overall search for gender diversity ;
 - combating sexist and sexual violence;
- Some of these trends are of interest to a growing number of institutes:
 - supporting parenthood ;
 - Raising awareness of the need for support, right from the application stage;
- Finally, we note the rise of new trends:
 - developing support for women filmmakers throughout their careers;
 - working on representation and combating unconscious bias, particularly among members of the institutes' selection committees.

² This represents a total of 38 national funds contacted, of which 37 responded.

³ The Albanian National Center of Cinematography is not a member of EFAD.

⁴ Ukraine is an exception here, given its current situation. Our contact informs us that the institute wishes to work on these issues of inclusion as soon as the political context allows it.

Before presenting the highlights of this 2023 study in detail, one fact remains fairly constant from year to year: **the reluctance of countries to implement quotas**. Indeed, 11 institutes have introduced moderate quotas, i.e. favouring films directed by women for films of equal quality, 3 countries have implemented hybrid quotas (Austria, Norway and the UK), but only Spain has introduced quotas for film financing.

Focus on Spain: since 2020, **a share of the total grants budget must be given to projects by female directors**. These quotas differ according to the type of funding granted by the Instituto de la Cinematografía y de las Artes Audiovisuales. Since 2022:

- 35% of the total "general aid" budget is reserved for projects by women directors;
- 40% of the total "selective aid" budget is allocated to projects by women directors.

This particularly ambitious and unprecedented measure should have a significant impact on the average share of films by women directors in Spain over the coming years. For more information, see the section of the study dedicated to Spain.

INTEGRATING PARITY INTO A GLOBAL SEARCH FOR DIVERSITY

- At an international level, 2022 marked the launch of the call for applications for the "New Dawn" funding project, an initiative that will be renewed in 2023. This is a pan-European fund which groups together 10 national public funds, including 9 European ones, with the aim of promoting a more inclusive cinematographic landscape to enable a greater diversity of perspectives and stories to be told;

Focus on New Dawn : announced in 2021 and launched in May 2022 at the Cannes Film Festival, several funds have set up a joint initiative, called **New Dawn**⁵, to promote **a more inclusive film landscape**, thereby enabling greater diversity in the perspectives and stories told. Launched at the initiative of the Netherlands and Sweden, the Netherlands Film Fund coordinates this fund.

This **pan-European fund** supports feature-length fiction and documentary projects that have already received financing. **The fund has a budget of 1,000,000 euros**. Financial support for selected documentaries is **100,000 euros**, and **200,000 euros** for fiction projects selected by

⁵ The countries whose public funds are participating in this initiative are: Belgium (Centre du Cinéma et de l'Audiovisuel de Bruxelles-Wallonie and Vlaams Audiovisueel Fonds), Canada (Telefilm Canada), Finland (Finnish Film Foundation), Ireland (Screen Ireland), Luxembourg (Film Fund Luxembourg), Norway (Norwegian Film Institute), the Netherlands (Netherlands Film Fund), Portugal (Portuguese Film and Audiovisual Institute) and Sweden (Swedish Film Institute). For full details visit the New Dawn website. <https://newdawn.film/>

the fund. Throughout the year, teams working on selected projects will also benefit from events organised by the fund, **designed to promote international networking**. The fund includes 9 European funds, as well as Canada, which will join the initiative in 2022.

- At a national level, new action plans mark a strong political commitment to more global inclusion. 15 countries now have a target for gender diversity. This is notably the case in Germany (new funding law including a diversity aspect - 2022), France (obtaining the "Equality and Diversity" label - 2022), Walloon Belgium (introduction of a "diversity sheet" for grant applicants - 2022; widening of soft quotas, with the Centre no longer giving preference only to films by female directors, but "the dossier bringing more diversity" - 2023). In addition, Flemish Belgium, Finland, Norway, and Switzerland have announced that they are working on introducing a gender diversity criterion in their next action plans.

Focus on the UK: in 2016, the British Film Institute adopted the Diversity Standards. They are regularly updated: in 2023, the Diversity Standards were reworked by experts to include more inclusive language, and a fifth standard was added. Films seeking financial support from Lottery Funding, a fund attached to the BFI, must now comply with diversity criteria (relating to gender, race, age, and disability) both in front of and behind the camera. This means that filmmakers' projects must demonstrate a commitment to inclusion and meet at least two of the five diversity standards to be supported.

COMBATING GENDER-BASED AND SEXUAL VIOLENCE

6 years after the start of the #MeToo movement launched in the film world, the Institutes are continuing and deepening their measures to combat sexist and sexual violence (SGBV) in particular and all types of violence in general. 16 countries are committed to this theme in 2023, compared with 12 countries in 2021.

In recent years, the Centres have taken a particular interest in violence committed on film sets and have encouraged film crews to call on the services of intimacy coordinators when shooting intimate scenes. This is the case in Finland (with the publication of guidelines - 2021), Germany (conferences - 2023), the United Kingdom (funding for the training of an access coordinator to ensure the well-being of everyone on film - 2023), Luxembourg (workshops to identify and combat harassment and violence on film sets - 2024) and Cyprus (funding for workshops on filming intimate scenes - 2024). This profession, which originated in the world of series, is increasingly being promoted in the film industry. To date, however, there is no obligation anywhere to call on the services of an intimacy coordinator.

Focus on France: the CNC is one of the institutes doing the most to combat sexist and sexual violence, notably through two particularly ambitious measures:

- Conditional aids: since the beginning of 2021, the CNC has made its aid conditional on compliance by the companies (production, distribution, sales...) that apply for it, with specific obligations in terms of preventing and detecting sexual harassment. This includes compulsory training and certification of the company's legal manager. This conditionality is applied year after year to a growing number of professionals: since January 2023, cinema operators have also been affected;
- The introduction of an insurance clause in all filming insurance contracts covering the risk of "harassment". This is a flagship action in the fight against SGBV, covering the cost of suspending filming following a complaint of harassment, assault or gender-based violence for 5 days, up to a maximum of 500,000 euros. The aim is to enable victims to speak out and report acts of violence without having to worry about wasting production time and money (from the end of 2021).

SUPPORTING PARENTHOOD

A number of centres are beginning to introduce incentive policies to support people with children working in film. These policies are not explicitly linked to gender, but in fact studies show that having children puts women at a greater disadvantage in the world of work: helping parents actually leads to greater equality in creative conditions between women and men.

6 countries are now committed to this theme, and the measures put in place take various forms: While some countries began adopting measures along these lines several years ago (Germany since 2016 and Switzerland since 2019), the movement gathered pace in 2022 with Austria, Croatia and Slovenia also introducing this type of incentive. This year, Montenegro has informed us that it is working on including childcare costs in the budgets eligible for support.

Focus on Austria: since 2022, the Austrian Film Institute has been working in two ways to support young parents working in the industry. The Centre :

- Encourages the introduction of "job splitting" aimed at improving working conditions for people with children. This enables several people to share tasks, or even a job, and work closely together to reduce working hours for each individual;
- Childcare costs are now eligible for funding from the Institute.

ASKING QUESTIONS ABOUT PARITY IN FUNDING APPLICATIONS

A number of Centres are now using funding application dossiers as a tool to promote parity and gender diversity in industry. This is the case in 13 countries, including 6 since 2022/2023. The application packs are used by some institutes to:

- Collect gendered data in a simple and effective way, as has recently been the case in Norway (funding applicants can fill in the application form). This has recently been the case in Norway (funding applicants have the option of completing personal data on gender, racial identity, age, sexual orientation and social class - 2022); in Sweden (national insurance numbers are requested from people in key positions such as director, scriptwriter and producer - 2023); in France (funding is conditional on the submission of data on the number of men and women in key positions in the production of the work - 2023) and soon in Croatia (compulsory form to be completed by producers of feature films receiving funding - 2023). producers of feature films financed by the Centre in order to receive the third installment: producers must list the various members of the film crew, indicating the gender of each person in the various positions);
- Raising awareness of these issues among funding applicants through compulsory or optional questions on funding application forms, as is the case in Belgium (compulsory diversity sheet inviting project promoters to reflect on diversity in front of and behind the camera - 2022; possibility of providing the name of a contact person in the event of harassment - 2023) and soon in Cyprus (optional question on the way in which the production intends to promote gender equality and co-education in front of and behind the camera).

Focus on Denmark: since 2020, with the aim of raising awareness and encouraging film professionals, the Danish Film Institute has created a new document to be completed by all producers applying for support. Producers are now required to provide information on:

- The gender composition of the technical, creative and casting teams;
- The salary distribution of the teams and the percentage pay gap;
- The number of dialogues for each member of the cast, with regard to gender.

DEVELOPING CAREER SUPPORT FOR WOMEN FILMMAKERS

Among the incentive policies designed to help, support, and encourage women filmmakers, in recent years we have noticed that the institutes are placing particular emphasis on support: mentoring, special training for taking up a position of high responsibility, leadership training, networking events, etc. To help women combat their imposter syndrome, encourage networking, and help them climb the career ladder more quickly, 10 countries, including 7 from 2022 - 2023, are introducing this type of support measure.

In recent years, this has been the case in Germany (mentoring programmes for women filmmakers - 2022); Spain (additional grants for a mentoring programme - 2022); Norway (funding for courses and training for young people from minority backgrounds to encourage

and help them to apply for film courses - 2022); the United Kingdom (creation of "Celebrating Black Women in International Film," a programme of events aimed at supporting black filmmakers to help them develop new links and partnerships - 2023); Belgium (training and empowerment programme open to producers and directors as well as non-binary people - 2023); Austria (creation of the Tandem training programme - 2023).

Focus on Belgium: in 2023, the Vlaams Audiovisueel Fonds (VAF) created a training and empowerment programme, Leiderschap en Eigenheid in Film. The programme is open to women producers, directors, and non-binary people. It consists of a series of modules on topics such as inclusive leadership, communication skills, and networking. The aim is to support and accelerate the careers of people subject to discrimination in the sector by giving them access to practical tools. VAF also offers childcare services for participants in the programme.

WORKING ON UNCONSCIOUS BIAS AND REPRESENTATION

Finally, one of the trends that seems to stand out this year is the work being done by the centres to deconstruct unconscious biases (in front of and behind the camera) and to raise awareness of the importance of representation (in front of the camera). Narratives and the stories they tell shape our collective imagination: to combat stereotypes - which are often unconscious - several centres have decided to train decision-makers and selection committee members in the importance of the images conveyed by the films they support. 10 countries are implementing this type of initiative, including 3 since 2023 and 1 in progress.

Among the countries involved in this approach are Belgium (training on unconscious stereotypes for its employees, its board of directors and members of selection committees - 2023); Germany (diversity awareness workshops for members of grant allocation committees and for its employees - 2023); the United Kingdom (compulsory training to combat racism in the industry - 2023) and Luxembourg (workshops to raise awareness of unconscious prejudice and inclusion for its employees - 2023). s - 2023); the United Kingdom (compulsory training to combat racism in the industry - 2023) and soon Luxembourg (workshops to raise awareness of unconscious prejudice and inclusion for producers and industry professionals - 2024) as well as Cyprus (a. The project team in question will then have to prove its involvement to the committee and the efforts made on the gender issue in order to move on to the next stage of funding).

Focus on Iceland : as part of their internal procedures, the Icelandic Film Centre's consultants are instructed, when reading and evaluating script projects, to consider the criteria defined in the Bechdel-Wallace test and to check whether the creative content of the applications favours multidimensional female characters.

A DISTINCT TEMPORALITY BETWEEN THE POLICIES ADOPTED AND THE STATISTICS

Finally, it should be remembered that this study consists of an inventory of the policies and initiatives taken by States to promote parity in the film industry, which makes it an exclusively qualitative study. The statistics mentioned at the beginning of each country chapter come from the study published by our partner, the European Audiovisual Observatory (EAO). Although we note that more and more countries are committing themselves to these issues of parity and gender diversity, and that more of them are putting policies in place, the effects of these measures are not immediate. The timeframe of the study is therefore twofold, between figures that reflect the impact of measures taken a number of years ago, and measures and policies taken this year, the consequences of which will be measurable later.

Since we know that there can be no real progress on these issues without ambitious policies, we will continue this work of collecting data year after year, to contribute at our level to encouraging countries to take a reflective look at their own measures and be open to the innovative practices of other countries.

Focus on the EAO statistics: on the statistical side, figures from the European Audiovisual Observatory show an increase in the share of films by female directors on average across Europe, but this progress is very slow and far from linear: some years see a decline in the share of films by female directors, as in 2018 and 2022.

The European average for 2018 - 2022 is 23% (compared with 22.4% for 2017 - 2021 and 21.3% for 2016 - 2020).

To look at the statistics over a longer period, between 2013 and 2022 the European average for the share of films by female directors rose from 19.9% to 22.4%: if the statistics continue to evolve at this rate, we'll have to wait until... 2080 to reach parity.

IV. SUMMARY TABLES

1. TYPES OF POLICIES

TYPES OF MEASURES		EXAMPLES	
Intentions	Statement of objectives		
	Recommendations		
	Charters		
Horizontal policies	Gender Mainstreaming	<i>Production of gendered data / inclusion criteria for funding allocation</i>	
Specific policies	Positive action	Regulatory policies	<i>Quotas / prioritisation of projects</i>
		Incentive policies	<i>Support / mentoring / bonuses / childcare facilities</i>
	Awareness Visibility Information		<i>Special prize for women directors / creation of a "gender equality" section on the Centre's website</i>
	Fight against violence		<i>Prevention campaigns / training / setting up a harassment referent on shoots</i>

2. MEASURES BY COUNTRY

% de films de réalisatrices 2018-2022	Pays	Intentions	Politiques régulatrices	Politiques d'encouragement	Gender mainstreaming	Sensibilisation/ visibilité	Lutte contre les violences	Laissez-faire
/	Albanie	X	X					
32%	Allemagne	X		X	X	X	X	
34%	Autriche	X	X	X	X	X	X	
27%	Belgique (Wallonie)	X	X	X	X	X	X	
	Belgique (Flandre)	X		X	X	X	X	
/	Bosnie Herzégovine							
14%	Bulgarie							
/	Chypre	X			X	X	X	
20%	Croatie	X		X	X	X	X	
29%	Danemark	X	X		X	X	X	
20%	Espagne	X	X	X	X	X		
24%	Estonie	X		X	X	X		
33%	Finlande	X		X	X	X	X	
26%	France	X	X	X	X	X	X	
16%	Grèce	X		X	X			
23%	Hongrie						X	
23%	Irlande	X		X	X	X	X	
37%	Islande	X			X	X		
15%	Italie	X		X	X	X	X	
30%	Lettonie				X			
22%	Lituanie	X		X	X		X	
17%	Luxembourg		X	X	X	X	X	
16%	Macédoine du Nord	X		X	X	X		
/	Malte				X	X		
/	Monténégro	X	X	X	X			
34%	Norvège	X	X	X	X	X	X	
29%	Pays-Bas	X		X	X	X	X	
19%	Pologne				X	X	X	
25%	Portugal			X	X			
24%	République tchèque	X			X			
20%	Roumanie				X			
20%	Royaume-Uni	X	X	X	X	X	X	
/	Serbie							
24%	Slovaquie				X	X		
18%	Slovénie	X		X	X	X		
34%	Suède	X		X	X	X		
29%	Suisse	X	X	X	X		X	
/	Ukraine							