Commentary

Making Sense of the International Reputation of a Small Film Industry: The Estonian Case*

sciendo

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ABSTRACT
This article presents the results of a multi-method study carried out by the Tallinn University Centre of Excellence in Media Innovation and Digital Culture (MEDIT). The aim of this study was to investigate how international film professionals perceive the Estonian film industry; what image they have of Estonian film, and how they envision or have experienced Estonia as a destination for production and collaboration. The results of the study indicate that the skills of Estonian filmmakers are increasingly internationally renowned and valued among foreign professionals. At the same time, however, awareness of Estonian film and its nature remains ambiguous to most international film professionals. While seeing Estonia as a Baltic country rather than a Nordic one, the professionals suggested setting up a Baltic film fund and developing a Baltic brand in order to raise international recognition of local film production.

INTRODUCTION

The recent years have been successful for Estonian films and the film industry in terms of their international recognition. *Tangerines* (*Mandariinid*/*მანდარინები*, Zaza Urushadze), a 2013 co-production with Georgia, won nominations for best foreign language film at the Oscars and the Golden Globes. *The Fencer* (*Vehkleja*/*Miekkailija*, Klaus Härö), a 2015 co-production with Finland, was also nominated for best foreign language film at the Golden Globes. In 2017, *November* (Rainer Sarnet, Estonia/Netherlands/Poland, 2017) won the jury award at the Tribeca Film Festival and its director of photography, Mart Taniel, won the Spotlight Award from the American Society of Cinematographers. Considering the size of the country, with a mere 1.3 million inhabitants, and its small film industry, the past few years have been exceptionally successful, especially considering that, on average, only three to six films a year are produced by Estonian filmmakers and that the budget of these films hardly ever exceeds a million euros. Most films are produced for much less.

Yet, owing to the small size of the domestic market, the domestic revenues of the films are hardly enough to grow and maintain a strong domestic film industry. Hence, the focus of the national film policy lies on the internationalisation of the industry. Although most of the films are produced with significant public support, additional revenues through export are necessary. In this context, international co-productions mean not only shared risks and higher budgets, but also improved possibilities for international revenues, as co-produced films generally travel better. An important aim for small film markets such as Estonia's, therefore, is to participate in as many co-productions as possible – as both majority and minor partner.

Further, as in much of Europe, Estonia has put a special emphasis in recent years on providing film production services to foreign producers. The phenomenon of 'runaway productions' (Elmer, Gasher 2005) has become a dominant trend internationally in which producers look for better production conditions in foreign countries compared to their home countries. What attracts producers to move parts or all of their productions to another country are often favourable tax conditions and other local benefits such as unique facilities or shooting locations. Since productions contribute positively to the gross domestic product of a country, countries compete to attract foreign producers. Furthermore, especially for smaller countries such as Estonia, there are additional arguments for participating in international production activities. Firstly, local film professionals benefit from being part of co-productions and from selling their production services to larger foreign productions as such activities help them to gain work experience and improve their skills. The experience and knowledge gained as well as the skills developed while working on international large-budget and high-quality productions not only help to attract further international partners and productions, but also help to improve the production of domestic films. Secondly, being part of international productions is a form of networking that helps to develop strong partnerships and a stable income from production activities in the future. Lastly, steady revenues from production services help local production companies to grow and, subsequently, support the institutionalisation of the local production industry. The result is likely to be a more professional and capable local industry producing national films with higher quality and more artistic value (for more, see Ibrus 2015).

Owing to the importance of international activities in the film industry, Estonia has focused on three main areas for increasing internationalisation in recent years: 1) supporting the international circulation of Estonian films; 2) developing co-production agreements with more countries (in addition to the European Convention on Cinematographic Co-productions that sets the basic terms for co-productions between European producers); and 3) establishing measures for attracting more foreign productions to Estonia.

Regarding policy instruments, the first of these lines of action has included public support for film distribution to festivals. Regarding co-productions, Estonia has signed unique agreements with large film countries such as France and South Korea. Regarding film production services, Estonia introduced a cash rebate for foreign companies. While most EU countries have various kinds of tax reliefs or tax rebates to attract foreign producers, Estonia with its 0% corporate tax rate needed to introduce a different system: a cash rebate that is a fixed percentage of the production budget.[1]

Despite all these measures already being in place, however, their effectiveness is not clear to policy makers. To better design and target the measures and to better understand international awareness of the Estonian film industry among foreign producers, we agreed with the Tallinn Black Nights Film Festival (PÖFF), its film market Baltic Event and its training platform Industry@Tallinn to carry out this study.[2]

METHOD AND SAMPLE

The study consisted of two stages: at the end of 2017, we first carried out an online survey and then focus group interviews. Both targeted foreign film professionals attending the international A-category film festival PÖFF, which takes place every year in Tallinn, Estonia. The online survey consisted of 54 questions in total, though many of them were filtered out for individual respondents. On average, respondents took 15 minutes to answer the survey. The survey was distributed two weeks prior to the event via email to the official delegates

1 See http://filmestonia.eu/index.php/film-estonia-cash-rebate/.

2 The study was financially supported by the Creative Gate project that is part-funded by EU structural funds and Enterprise Estonia.

of the festival and 228 questionnaires were filled out. We used Survey Monkey and SPSS for the analysis of the data.

Consequently, in order to explore qualitatively alternative interpretations of the survey data, we organised four focus group interviews. For this, we classified participants in groups based on their role in the film industry and their experience with the Estonian film industry. The first group with six participants consisted of people in charge of policy making, mostly representatives of national film institutes. The second group of ten participants consisted of people who work for festivals or sales and distribution companies, i.e. people who 'trade' with films as finished objects. Members of the third group of five participants were filmmakers who had worked with Estonian colleagues before and the fourth group of six participants consisted of filmmakers who had no prior experience with the Estonian film industry. We consulted the organisers of PÖFF to find suitable participants from various regions across Europe and the globe and to set up the schedule for the group interviews. In total, the participants in the focus group interviews came from 22 different countries, both within and outside of Europe. The focus group interviews lasted between 48 and 72 minutes and we recorded and later transcribed them. For the analysis of the transcripts, we used NVivo. The following presents the most significant quantitative as well as qualitative data.

SOCIAL CHARACTERISTICS: ROLE, REGION OF RESIDENCE AND WORK EXPERIENCE

The opening set of questions in the online survey provided the demographic data for the respondents, such as their role in the film industry, their work experience, their country of residence and their age. Of the respondents, 68 (30%) identified themselves mainly as film producers, 50 (22%) as directors and 14 (6%) as distributors. All other prescribed answer choices (cinematographer, art director, animator, etc.) were adopted by a couple of people only. An open response option 'Other, please specify' was chosen by almost 40% in the total sample of respondents who provided us with a specification of their roles in the industry.

To include these respondents in the analysis and distinguish clearly between the process of making the film and that of disseminating the film, we reorganised this variable into two categories: production (producers, directors, cinematographers, etc.) and distribution (sales agents, distributors, festival programmers, etc.). The representatives of film funding institutions were excluded from the sample (only when cross-tabulating) owing to their quantitative insignificance (17 respondents), but their perspective was presented in one of the focus groups in more detail.

Respondents were allowed to skip selected questions. Some questions functioned as filters to ensure that the respondents met the required criteria for subsequent questions. These are the reasons why the total number of respondents varies for each topic, especially in the case of every table or chart that demands cross-tabulation of several variables.

To identify their background, the respondents were asked about the country they originally come from and the country they mostly reside in currently. The latter was used as a demographic variable in this study and 48 different countries were named. **(Chart 1)**

For further analysis, we reorganised the countries into four regions: Nordic, Baltic, rest of Europe, outside Europe. The Nordic countries include Finland, Sweden, Denmark, Norway and Iceland. The Baltic countries include Latvia and Lithuania. The rest of Europe includes countries in the European Union as well as Russia, Macedonia, Turkey, Serbia, Moldova, Ukraine, Belarus and Kosovo. Countries outside Europe include the USA, Costa Rica, Azerbaijan, Iran and Vietnam. When several countries were listed, the first one only was included in the analysis. Three people said they mostly reside in Estonia. These respondents were excluded from the analysis when

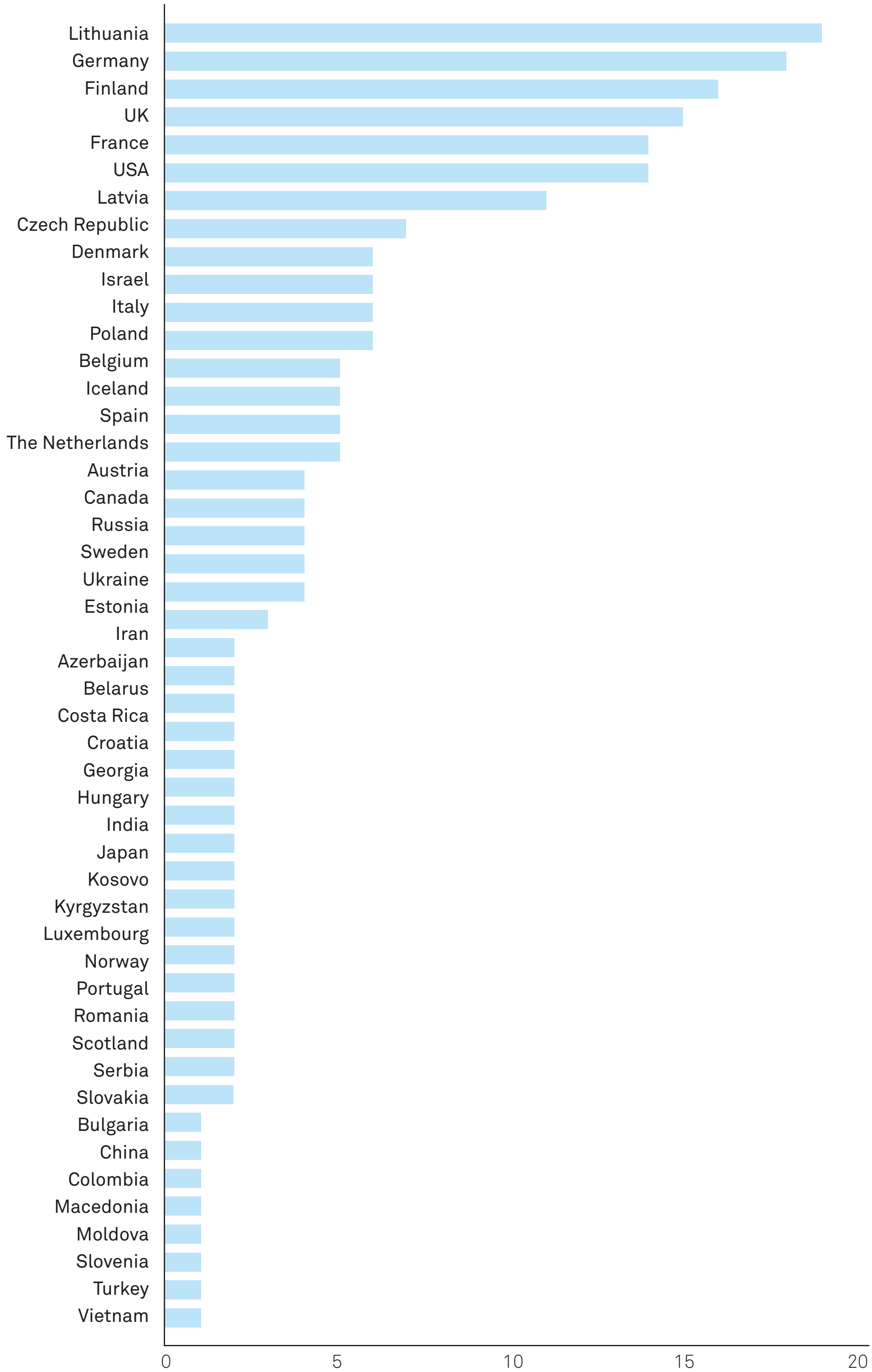

CHART 1. Number of respondents by country of residence.

			Region of residence				
			Nordic	Baltic	Rest of Europe	Outside Europe	Total
Role	Production	Count	21	15	74	27	137
		% within Region of residence	70.0%	55.6%	67.3%	64.3%	65.6%
	Distribution	Count	9	12	36	15	72
		% within Region of residence	30.0%	44.4%	32.7%	35.7%	34.4%
Total		Count	30	27	110	42	209
		% within Region of residence	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 1. Role in the industry by region of residence.

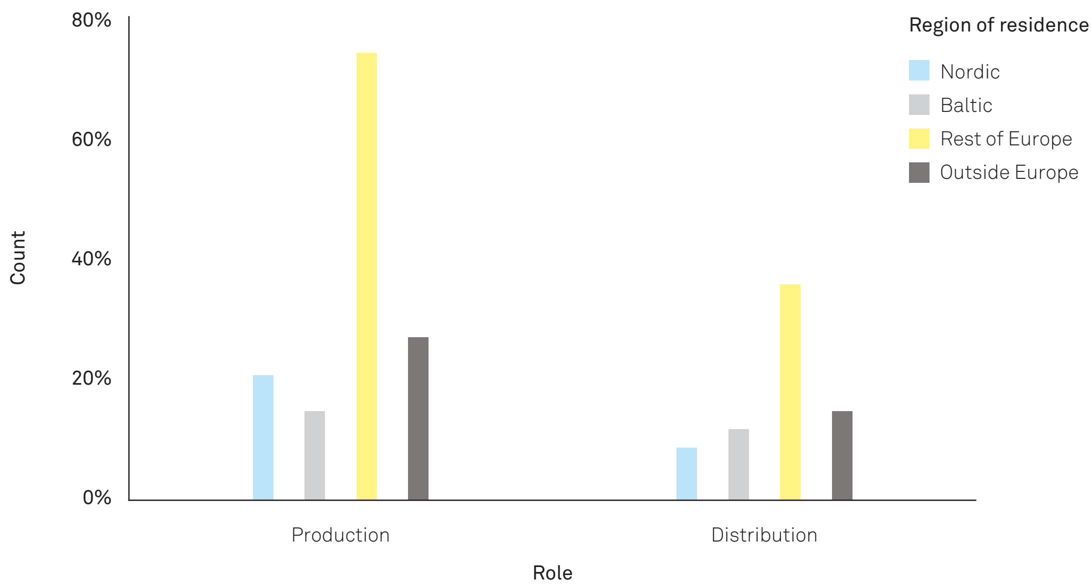

CHART 2. Role in the industry by region of residence.

cross-tabulation by the region of residence was applied. **(Table 1, Chart 2)**

The majority of the respondents were professionally highly experienced – more than half of the total sample of respondents had worked in the film industry for more than 10 years. **(Table 2)** The largest age range category was 31–40 years. **(Chart 3)**

EXPERIENCE WITH ESTONIA

Of the respondents, 44% (n=195) had not visited Estonia before coming to the country for the PÖFF in 2017. However, not surprisingly, almost every professional residing in the Nordic or Baltic region had visited Estonia before. **(Table 4)**

Over 40% of the respondents (n=109) claimed to visit Estonia once a year. This most probably refers to their annual attendance at PÖFF and the importance of the festival for attracting international film industry people to Estonia.

Most of the respondents (57% out of 194 respondents) had never worked with Estonian film professionals before. The percentage of those with some experience was higher among the people from the Nordic and Baltic regions. **(Table 5)** While the number of people with experience in film production with Estonians appeared to be smaller in farther regions, around 50–60% of the people in the distribution cohort had had some Estonian work experience regardless of their regional affiliation.

Of the 42.8% of respondents who had worked with an Estonian film professional before (n=194), 71.25% had worked with an Estonian producer. In addition, the majority of them (60%) had worked with four or more different Estonian film professionals. These numbers indicate that work experience with Estonian film professionals could lead to strong long-term cooperation relationships and that the role of Estonian producers particularly is valuable in building them. At least, this applies to the people attending PÖFF.

More specifically, co-production was chosen as the nature of Estonian cooperation in 31 cases and these were mostly people from the Nordic (13) or rest of Europe (12) regions. Co-production was followed by selling films to Estonia (19 cases) and buying Estonian films (11 cases). Under the 'Other' category, various kinds of film festivals and promotion-related activities were mentioned.

At the same time, the professionals appeared to be less experienced with Estonian distributors and directors – just 32.5% of the Estonian-experienced 80 respondents had worked with one or the other.

Keeping that in mind, when describing the experience of working with Estonian professionals, the general tone of the focus group interviewees was rather positive, while recognising the limitations of a small country. Respondents expressed difficulties in buying and distributing Estonian films abroad while praising the capabilities of Estonian producers.

For example, a Serbian sales agent highlighted the international scope and leadership of an Estonian producer Riina Sildos:

> They're really active on this, although small, and they're really brave. [---] I mean ... for example Riina Sildos – she's head of the one group in EAVE, which is really some kind of recognition for the field of the international co-producers stepping on the market. She's a group leader, you know, representing Eastern Europe, in a way.

And a Lithuanian filmmaker talked about the ability of an Estonian producer to keep calm in nervous situations on-set:

> When something happens unexpectedly when doing the shooting. And ... with, like, a shock – 'what to do?' – and the production manager, Estonian, she's fantastic! And she just says ... yes, something – you know, if you start joking, it's like, you know, when you're so stressed, it relieves you, and – 'okay'.

	Count	Percentage
Less than 2 years	11	4.8
2–5 years	50	21.9
6–10 years	52	22.8
11–15 years	52	22.8
16–20 years	17	7.5
More than 20 years	46	20.2
Total	228	100.0

TABLE 2. Respondents by work experience in the industry.

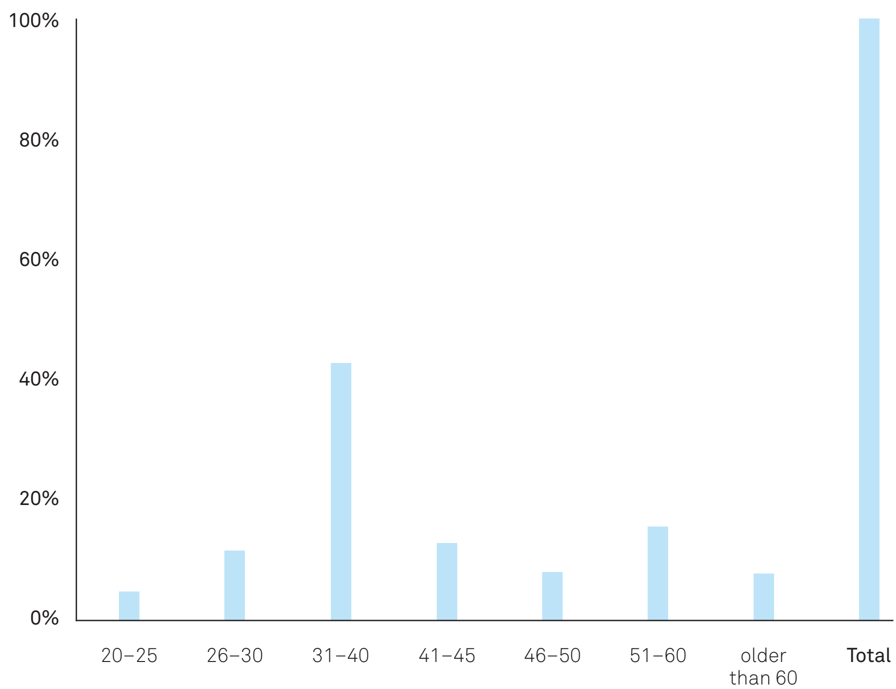

CHART 3. Respondents by age.

			Region of residence				
			Nordic	Baltic	Rest of Europe	Outside Europe	Total
Visited Estonia	Yes	Count	23	28	39	18	108
		% within Region of residence	85.2%	96.6%	37.9%	51.4%	55.7%
	No	Count	4	1	64	17	86
		% within Region of residence	14.8%	3.4%	62.1%	48.6%	44.3%
Total		Count	27	29	103	35	194
		% within Region of residence	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 4. Visited and not visited Estonia by region of residence.

				Region of residence				
				Nordic	Baltic	Rest of Europe	Outside Europe	Total
Production	Have you ever worked with an Estonian film industry professional?	Yes	Count	11	7	17	4	39
			% within Region of residence	61.1%	50.0%	25.8%	19.0%	32.8%
		No	Count	7	7	49	17	80
			% within Region of residence	38.9%	50.0%	74.2%	81.0%	67.2%
		Total	Count	18	14	66	21	119
			% within Region of residence	100.0%	100.0%	100.0%	100.0%	100.0%
Distribution	Have you ever worked with an Estonian film industry professional?	Yes	Count	3	6	17	8	34
			% within Region of residence	50.0%	50.0%	56.7%	61.5%	55.7%
		No	Count	3	6	13	5	27
			% within Region of residence	50.0%	50.0%	43.3%	38.5%	44.3%
		Total	Count	6	12	30	13	61
			% within Region of residence	100.0%	100.0%	100.0%	100.0%	100.0%
Total	Have you ever worked with an Estonian film industry professional?	Yes	Count	14	13	34	12	73
			% within Region of residence	58.3%	50.0%	35.4%	35.3%	40.6%
		No	Count	10	13	62	22	107
			% within Region of residence	41.7%	50.0%	64.6%	64.7%	59.4%
		Total	Count	24	26	96	34	180
			% within Region of residence	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 5. Experience with Estonian film professionals by role and region of residence.

Further, around 39% of those who were generally interested in the production of films with foreign partners and at foreign locations said that the skills of the Estonian film professionals were one of the two most important reasons for them to collaborate with an Estonian colleague. A producer from Lithuania said:

> In Estonia, I think there is maybe better management.... It's really a very well-organised film industry; professional.

Half of the respondents who had worked with Estonian film professionals (n=80) said that the cooperation met their expectations. **(Chart 4)** For around 34%, the experience was better than expected. The proportion of the latter respondents was larger among the professionals working in production compared to those working in distribution. **(Table 6)**

In addition, survey respondents were asked to provide up to three words to describe their experience with representatives of the Estonian film industry. Aggregating the responses, the following word cloud visualises the frequency of the most popular words used (n=63). **(Chart 5)**

Terms such as 'professional', 'pragmatic' and 'practical' also frequently emerged in the focus groups when work experience with Estonians was discussed.

IMAGE OF ESTONIA AND ESTONIAN FILM

In order to analyse how impressions of Estonia as a country influence impressions of Estonia's film identity and vice versa, the professionals were asked about the images they have of Estonia and of Estonian film separately. Around 78% of the respondents (n=195) thought of Estonia mainly as a Baltic country. While the people from the Nordic, Baltic and rest of Europe regions fairly unanimously discerned Estonia as a Baltic country, the professionals from outside Europe were slightly more inclined to think of Estonia as a Nordic or a post-Soviet country than their colleagues with closer geographic proximity to Estonia. **(Table 7)**

Under the 'Other' section, various kinds of combinations were named.

Similarly, in the focus group discussions, Estonia was mostly seen as part of the Baltic states, though still different from the other Baltic countries owing to its Nordic influences, which, arguably, have helped Estonia to get over its past as part of the Soviet Union and made it more modern.

As a policymaker from Iceland put it:

> You cannot sense any longer that this is a former Soviet country, you know, when you're here – definitely not. I was here the first time '95 and then it could ... you know, there was a very strong sense of Soviet trauma. So, I think, for me, it's more like Finland – Nordic – than the others, but still ... still a Baltic family.

On the other hand, a policymaker from France tended to distinguish Lithuania from Estonia and Latvia:

> I mean, between Estonia, Latvia, and Lithuania, it's very different. So, I see already a big distinction between Lithuania and Estonia because Lithuania is more Central Europe, it's more linked to Poland. So, the language is very different and the culture ... it's not, uh, a Baltic state basically ... Between Latvia and Estonia, the difference is less clear to me.

The confusion around the perceived identity of Estonian film became even more intense in the focus group combining sales and distribution people. Many stated that films from the Baltic states tend to get mixed up.

> I don't know if it has found that cultural film yet; you know, to identify ... you know, something very quirky about, you know, Estonia. I haven't seen it – I mean

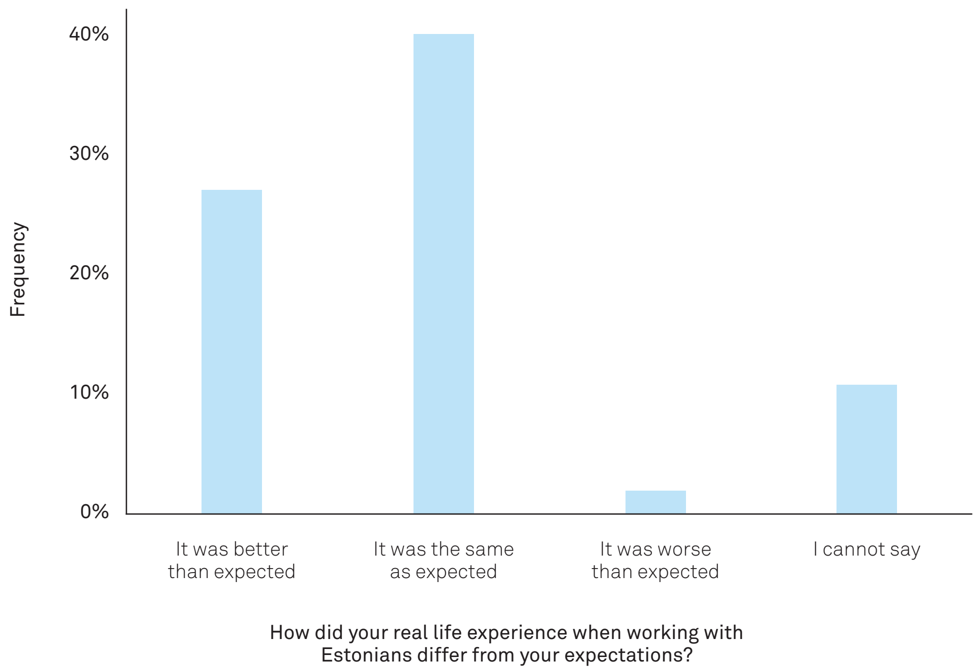

CHART 4. Evaluation of experience with Estonian film professionals.

	Production	Distribution	Total
It was better than expected	16	9	25
	42.1%	27.3%	35.2%
It was the same as expected	16	18	34
	42.1%	54.5%	47.9%
It was worse than expected	1	1	2
	2.6%	3.0%	2.8%
I cannot say	5	5	10
	13.2%	15.2%	14.1%
Total	38	33	71
	100.0%	100.0%	100.0%

TABLE 6. Evaluation of experience with Estonian film professionals by role.

> I don't know if it exists or not. (Sales agent, Canada)
>
> I didn't really distinguish between Baltic films, if they were Estonian or Lithuanian or.... But in the recent years, I've been more aware of Estonian films. (Film festival representative, Denmark)
>
> It's very hard for them to recognise – 'Was it a Latvian film? Lithuanian? Is this guy Estonian?'... So, it's kind of like, 'It's from the Baltics' and people, like ... Normal people even don't know the capitals of each of the countries – they won't know. (Producer, Czech Republic)

In line with these statements, a quarter of the 225 survey respondents could not name any Estonian films (including co-productions); however, around 43% claimed to know four or more Estonian film titles. It appears, then, that the professionals were either significantly aware or totally unaware of Estonian films.

Awareness of Estonian film titles was higher among the distributors than the producers. While around 46% of the distributors could name more than five titles, 33% of the people in the production cohort could not name any. In terms of the region of residence, the professionals in the Nordic and Baltic countries were most aware of Estonian films. **(Chart 6)**

Relatedly, respondents were given the chance to name up to three of their favourite Estonian films (including co-productions). In total, 67 titles were mentioned (n=101). *Tangerines* was mentioned most frequently (33 times), followed by *November* (16), *Autumn Ball* (*Sügisball*, Veiko Õunpuu, Estonia, 2007) (15), *In the Crosswind* (*Risttuules*, Martti Helde, Estonia, 2014) and *The Temptation of St. Tony* (*Püha Tõnu kiusamine*, Veiko Õunpuu, Estonia/Finland/Sweden/France, 2009) (14), *1944* (Elmo Nüganen, Estonia/Finland, 2015) (11), *The Fencer* (10) and *The Class* (*Klass*, Ilmar Raag, Estonia, 2007) (9).

For around 37% of the people who could name at least one Estonian film (n=139), the specific narrative was about the most distinctive characteristics of it. Then, 20% thought that Estonian films are characterised by specific photography work, while, under the 'Other' category, a 'specific sense of dark humour' appeared several times.

Words such as 'original', 'specific', 'exotic' and 'distinctive' were also regularly used to describe encounters with Estonian films in the focus groups. The sense of uniqueness was often linked to Estonia's political history and its status as a small country.

As a French policymaker stated:

> What we know is that you have a culture, a small country, and this love for your language, your own history, the fight for independence. And for me, it's linked to creation – the fact that you are producing things that are really specific to this culture that is very different from the other Baltic states. [---] There is something very special, lively, ancient that can come across through art.

Some drew connections to Estonia's folk songs, choir culture or medieval settings, feeling that they seemed to contribute to specific Estonian film aesthetics. One of the interviewees said that there was something very 'quirky' about Estonian films, but he had not been able to pin it down yet. Another sales agent thought that Estonian filmmakers had recently stopped applying the Eastern European style of storytelling with its 'long explanations in the beginnings'. According to the agent, this had made Estonian films more modern and specifically Estonian.

Specifically in relation to *November*, telling expressions occurred:

CHART 5. Most popular words used to describe experience with Estonian filmmakers.

			Region of residence				
			Nordic	Baltic	Rest of Europe	Outside Europe	Total
When you think of Estonia, do you see it mainly as a...?	Other (please specify)	Count	1	1	4	1	7
		% within Region of residence	3.7%	3.4%	3.9%	2.9%	3.6%
	Baltic country	Count	25	27	81	18	151
		% within Region of residence	92.6%	93.1%	78.6%	51.4%	77.8%
	Nordic country	Count	0	1	10	9	20
		% within Region of residence	0.0%	3.4%	9.7%	25.7%	10.3%
	Post-Soviet country	Count	1	0	5	6	12
		% within Region of residence	3.7%	0.0%	4.9%	17.1%	6.2%
	Cannot answer	Count	0	0	3	1	4
		% within Region of residence	0.0%	0.0%	2.9%	2.9%	2.1%
Total	Cannot answer	Count	27	29	103	35	194
		% within Region of residence	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 7. Estonian identity perceived by region of residence.

> And I was, like, trying to … relate it to anything I could understand. It was very … extremely beautiful, aesthetic, but I couldn't understand anything. It was really, like … very mysterious, as you said [referring to another focus group respondent]. So, there's something appealing about that, but at the same time, it seems a bit far … still very far. So, I would say that the strangeness – I could see it in *November*. (French policymaker)

> And it was really crazy. I started talking to a Costa Rican friend who came with us as well. He was in Italy, but he wanted to join us. And I was like, 'This is crazy!' Are all … because we don't know any Estonian films – like … is there a thing, like, about that type of aesthetic – are Estonian films like that? (Director from Costa Rica)

On the other hand, *Zero Point* (*Nullpunkt*, Mihkel Ulk, Estonia, 2014), for example, was seen as a 'high school movie you would find anywhere in the world', as a sales agent from Canada said.

Thus, a variety of experiences with regard to Estonian film among the professionals had influenced their individual understanding of its identity. As a well-informed Czech producer stated: 'I think there's quite a bit of diversity in what films are made here.'

A couple of interviewees were discussing whether the 'weird element' or 'specific flavour' in Estonian films might stop the films from travelling internationally. At the same time, however, Estonian films were praised for contributing to the diversity in the international film market.

> And *Mother* [*Ema*, Kadri Kõusaar, Estonia, 2016], for me, really stands out as, uh, a film that could not have been made just anywhere, I feel, because it has a very distinct Estonian flavour, but it is very … there are also not too many kinds of just local references – like, it can travel. (Festival representative from the USA)

> Adds to the diversity, you know. I mean, it's … it's an important player. [---] There's a hunger for new and more voices. [---] I think, you know, the general audience is prepared to look and experience some new … new cultures, new stories. More stories, diverse stories. (Policymaker from Iceland)

Compared to the awareness of Estonian films, awareness of Estonian actresses and actors was somewhat lower, with 43% out of 209 unable to name a single Estonian actress or actor. Altogether, 42 names were mentioned by the rest of the respondents (n=42). Lembit Ulfsak was mentioned 12 times, followed by Juhan Ulfsak, Märt Avandi and Taavi Eelmaa (five times each).

IMAGE OF THE ESTONIAN FILM INDUSTRY

In addition to the impressions of Estonia as a country and Estonian film, we were interested in how the professionals feel about the Estonian film industry, i.e. the local professionals engaged in production and distribution, the supporting organisations and the infrastructure. Of the total sample of respondents, 71% (n=228) had heard of at least one Estonian filmmaker. Around 44% had heard of four or more Estonian directors and 42.5% had heard of four or more Estonian producers. The professionals from the Nordic and Baltic regions showed higher awareness of Estonian filmmakers than the professionals from the rest of Europe and farther countries. **(Chart 7)** Estonian screenwriters, cinematographers and distributors were generally much less heard of, but, outstandingly, 15 respondents claimed to have heard of more than five Estonian cinematographers, and this was not dependent on their region of residence. More than half of the respondents

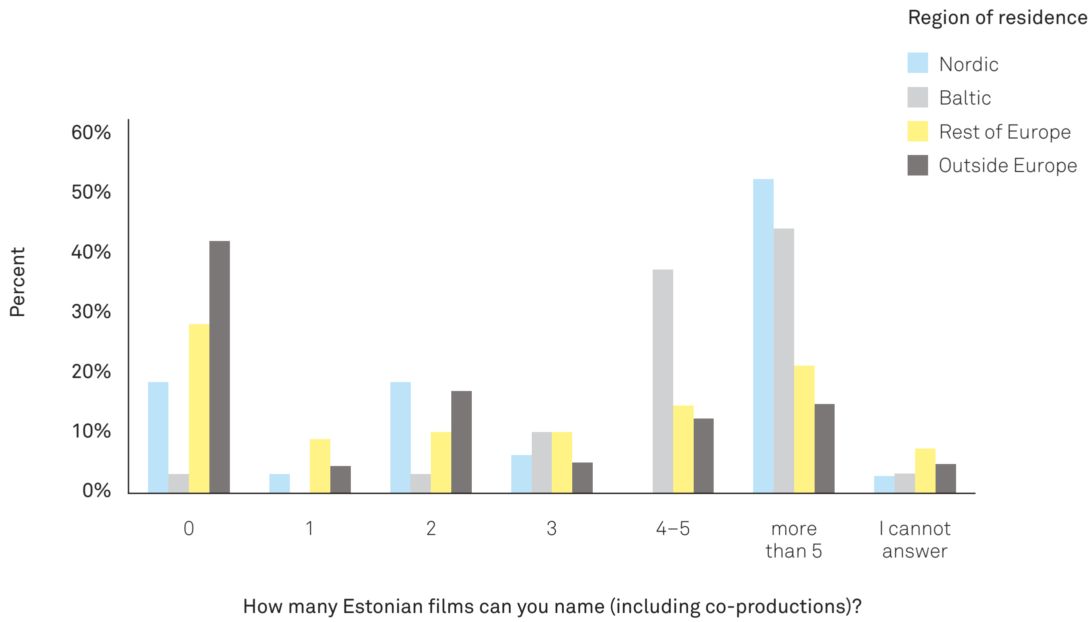

CHART 6. Awareness of Estonian film titles by region (n=225).

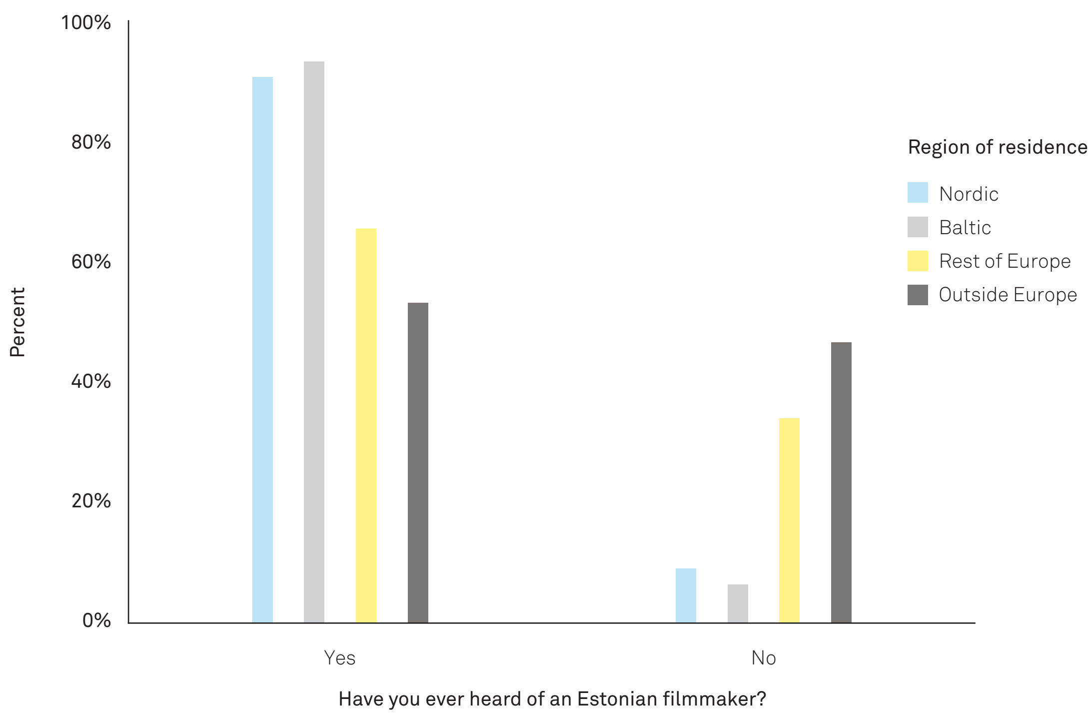

CHART 7. Awareness of Estonian filmmakers by region (n=208).

could not name any Estonian film studios (n=202). Among those who knew one or more Estonian film studios, the film studio Allfilm was mentioned most frequently (17 times).

Interestingly, although Estonia was mostly considered a Baltic country, 45% of respondents thought that there are clear differences between the Estonian, Latvian, Lithuanian and Finnish film industries (n=195).

Aggregating the open responses (n=45), the Estonian film industry compared to the Finnish was mostly seen as smaller. Compared to the Latvian film industry (n=49), the Estonian film industry was mostly perceived as more international, and compared to the Lithuanian film industry (n=48), the Estonian film industry was mostly seen as smaller.

However, in a more detailed analysis of the survey, contradicting opinions emerged. For example, the Estonian film industry was occasionally seen as both less and more known around the world in comparison to the Latvian. And it was also seen as both more and less developed than the Lithuanian film industry. The focus group interviews also made such contradictory opinions obvious. Here, the Estonian film industry was frequently seen as more advanced in terms of its organisational structure in comparison to the other countries. Some thought that Lithuania was better at promoting itself and that particularly Latvia was not doing very well in that respect.

> I also know the Vilnius festival and co-production meeting, which is also very well organised, I think – very, very charming. But they are a little bit forward here. That's more advanced already. (German producer)

While most of the respondents found it difficult to clearly distinguish the characteristics of the film industries in the three Baltic countries, large parts of the focus group discussions revolved around the difficulties faced by film industries in small countries of being visible to the international film production market. This was a challenge that everybody seemed to acknowledge. As a policymaker from the UK said:

> There is zero visibility. Nobody could name … well, *Tangerines*, maybe, but that is only among the film (meaning: creative) people. But there is a very low level of visibility of the films, let alone the filmmakers, let alone the industry…. Everyone in film would say: 'Well, it must be tiny – is there one?'

Of the online respondents, 29.5% (n=200) said that they first became aware of the Estonian film industry in the last two years, and that, indeed, can be related to the *Tangerines*' Oscar nomination. This was also affirmed by a policymaker from Iceland:

> I think it definitely put a spotlight on Estonia because it was shortlisted for the Oscars. So, it got very general attention, I think.

Moreover, the Icelandic policymaker noticed a larger positive trend. Talking about the visibility of the Estonian film industry, she added:

> It is absolutely growing … the visibility is much better and stronger now than some years ago … it's definitely upwards.

Given the fact that the Estonian films with international visibility are all international co-productions, the question of whether those films can, in fact, be considered Estonian films arose in the focus groups. This was discussed in particular for *Tangerines.* Especially in the focus group consisting of sales and distribution professionals, the interviewees discussed whether the primary origin of a given film was determined by the nationality of the director, the leading actor, the story or the funding source.

Others thought that the producer managing a particular film and the way it was internationally presented decided the matter. For example, a sales agent from Canada said:

> Well, it was … when it went for the Oscars, it was really presented as an Estonian film, right? Even though it's a co-production. And culturally, it has a lot of … you know … Georgia … I mean, Georgian in it as well, right?

And another from Serbia demonstrated:

> There is a reason why you have *Tangerines* as an Estonian film. There was some producer who went and chose this project carefully from the … from the region of Caucasia.

Whether *Tangerines* expressed the identity of Estonian film or not, the value of its success was several times seen as a foundation for potential future co-production:

> After *Tangerines*, the director of this film, but as well other Estonian directors would be much … for them, it would be much easier to co-produce, cooperate with Poland. (Polish policymaker)

Despite the low visibility of Estonian films, focus group participants very often highlighted the professional effort and activism of the two most important institutional players in the local film industry in trying to create visibility for the Baltic region as a whole: PÖFF and the Estonian Film Institute (EFI).

> I think when it comes to the film industry, PÖFF is really … was the thing that mattered – that made the difference. For many film professionals, that was the place … where they discovered that they are … first of all, Baltic countries, you know – what they are like; and that there is something happening in their film industries. (Czech producer)

The professionals behind the festival and at EFI were characterised as hardworking and friendly. Their work on initiating and building international relationships was unanimously acclaimed, echoing positive feedback about Estonian producers outlined above. As a German producer said:

> You have wonderful people who are running the film fund, who are running the festival. It is well organised, which is very, very … I mean, charming, professional….

And a policymaker from the UK agreed:

> Really, a lot more Ediths[3] are needed to help to realise the ambition that she has and, clearly, one imagines that all the producers in Estonia would have for their film and Estonian film.

In consequence, regardless of the struggles to identify the nature of Estonian film, the organisational structure of the industry and the professionals engaged in it were looked at positively. In particular, Estonian film professionals were seen as capable, easy to work with, and the industry was seen as strong and growing, as captured in a comment by a film festival representative from the USA:

> I think that doing the groundwork that no one maybe … that the greater population doesn't see, but the industry knows – like, if everyone here says, it's great to work with Estonians and there are these great schemes … and even if it's a co-pro … even if *Tangerines* abroad isn't seen as an Estonian film, that brought huge benefits for Estonia, right?

3 Referring to Edith Sepp, Director of the Estonian Film Institute.

As was the case when describing experiences working with Estonian film professionals, the survey respondents also most frequently indicated that the best quality of the Estonian film industry was its professionalism. **(Chart 8)**

As also demonstrated briefly above, low visibility and small size of the market appear to be the biggest weaknesses of the Estonian film industry. **(Chart 9)**

AWARENESS OF ESTONIAN FUNDING SCHEMES

Another aim of the present study was to learn about the foreign professionals' knowledge of Estonian film funding schemes. Around 40% of the survey respondents who said they were generally interested in the production of films with foreign partners and/or at foreign locations (n=162) were aware of some co-production funding schemes from Estonia. The Nordic and Baltic professionals were more aware of these opportunities than their counterparts from farther regions. **(Table 8)**

However, only around 18% of those who were aware of the schemes (n=62) had applied for Estonian funding for co-productions. Similarly, 40% were aware of the cash rebate system offered by the EFI, but only 3% had applied for it. The reason for this may well be that the Estonian cash rebate system was only introduced in 2016. Again, the Nordic and Baltic professionals appeared to be more aware than their European and non-European colleagues. In the focus group interviews, few questioned the importance of the cash rebate for attracting international film projects. A Polish policymaker said:

> Well, Polish producers would not shoot in Estonia because there is a cash rebate, they would shoot if there was an interesting project. I think the project is the first thing, the quality of the project, and then later comes the cash rebate.

Most of the professionals, however, thought that the cash rebate had an immediate positive effect of attracting foreign producers and some of them already had an application in progress. As a Czech producer said:

> I think that the rebate is absolutely necessary if you want to compete with other countries because nowadays almost everyone has it.

And a German producer said:

> They quickly react, when you think about the tax refund model here – which is 30%, so I will do two feature films next year here. [---] I guess it will … will grow a lot – the film industry here – within the next years, because of this tax incentive.

Also, the question of whether there should be a prescribed minimum budget for films and how high it should be in comparison to other countries was addressed. A Belgian policymaker said:

> I mean, competition is normal. So, you know, that's fair – fair enough to have your own … your own system. In Belgium, we have a tax shelter, which is very compatible with other tax rebate systems in Europe.

The focus group interviews also discussed the cash rebate system in connection with the overall expenses of producing a film abroad. Being less expensive in general compared to Western European countries was recognised as a benefit of Estonia. As an Austrian distributor said:

> I think the good thing is that you are still a cheaper country than some other Western European countries. [---] Although you have only 30%, the value is much higher than Belgium and other countries, so….

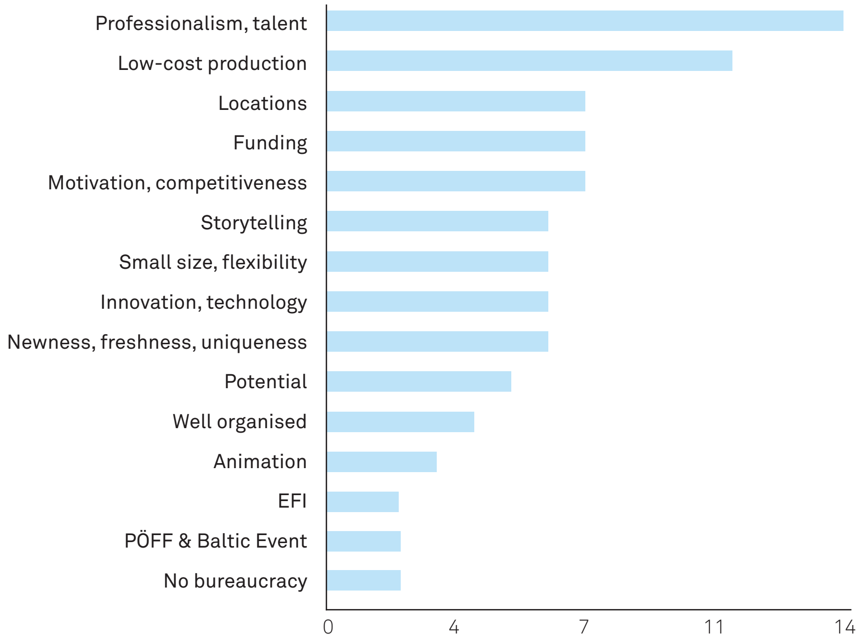

CHART 8. Strengths of the Estonian film industry (n=82).

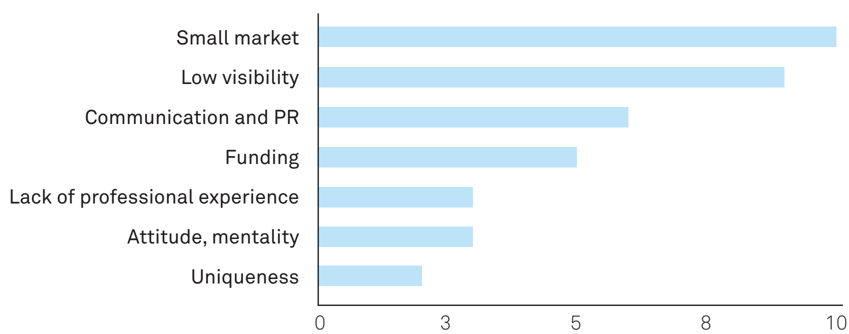

CHART 9. Weaknesses of the Estonian film industry (n=68).

In addition, a filmmaker from Denmark pointed out that returning the money was smoother compared to other countries. The focus group interviewees also emphasised the relatively low level of bureaucracy and the high level of flexibility as positive characteristics of the Estonian industry.

As the films in Europe as elsewhere are becoming more expensive and financing films is getting more difficult, the majority of the professionals in the focus groups stressed the importance of co-productions and the cash rebate system, especially for small countries such as Estonia. As the cash rebate programme was only introduced in Estonia in 2016, we might be seeing a rise in its usage in the near future. This is supported by the fact that the survey showed that the main reason why producers had not made use of the cash rebate scheme from Estonia, yet, was that they had not had a film project that was applicable for the scheme since the launch of it.

READINESS TO COOPERATE WITH ESTONIAN FILM PROFESSIONALS

Lastly, the online survey asked the respondents to reflect upon the positive and negative characteristics of the Estonian film industry and their influence on potential cooperation activities. The 87% of respondents (n=192) generally interested in the production of films with foreign partners and/or at foreign locations were asked to select the most important motives for considering bringing their production to Estonia. The local co-production funds were most frequently chosen. **(Table 9, Chart 10)** Second and third were the skills of the local professionals and the locations. In the 'Other' category, respondents mentioned, for example, 'mutual theme', 'exchange of ideas' and 'communication'.

Estonian co-production funds were especially important for the Baltic filmmakers. **(Table 10)** In general, 63% of all the responding professionals working in production marked it as one of the most important premises for bringing their production to Estonia. As described above, international filmmakers have mostly positive work experience with Estonian professionals. The online survey suggests that the Estonian 'pragmatic professionalism' has developed into a valuable international trademark.

Chart 11 presents the popular examples of what should be improved in the Estonian film industry for the respondents to take an interest in cooperation with Estonian producers (n=55). In addition to purely financial concerns, promotion-related activities seem to be an area in need of improvement.

The following word cloud aggregates the frequency of the words and phrases that survey respondents used when naming up to three reasons why they would want to shoot a film in Estonia (n=77). The importance of locations (most often described as wild, Nordic, beautiful and unique) alongside financial expectations was emphasised. **(Chart 12)**

The following word cloud aggregates the frequency of the words and phrases that survey respondents used to describe what could be improved to make cooperation with Estonian filmmakers more attractive (n=50). Notably, language skill ('English') appears to be among the most popular concerns alongside funding. **(Chart 13)**

In terms of 'trade', 79% of the respondents (n=176) were generally interested in distribution deals with foreign partners. The majority of them, too, were interested in selling films to Estonia. **(Table 11)**

Cross-tabulation did not produce any significant differences by region of residence regarding this variable apart from the fact that none of the professionals from outside Europe were interested in only buying Estonian films for international markets. Professionals in film production were more interested in selling films to Estonia, while professionals in film distribution evenly favoured both selling and buying. **(Table 12)**

The focus group interviewees discussed reasons why Estonian films were hard to sell internationally. An Austrian sales agent said:

			Region of residence				
			Nordic	Baltic	Rest of Europe	Outside Europe	Total
Are you aware of any co-production funding schemes that are available from Estonia?	Yes	Count	14	11	31	7	63
		% within Region of residence	60.9%	55.0%	36.0%	21.2%	38.9%
	No	Count	9	9	55	26	99
		% within Region of residence	39.1%	45.0%	64.0%	78.8%	61.1%
Total		Count	23	20	86	33	162
		% within Region of residence	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 8. Awareness of Estonian co-production funding schemes by region of residence.

	Count	Percentage of cases
Skills of local professionals	63	38.9%
Locations	60	37.0%
Co-production funds	88	54.3%
Cash rebate funds	48	29.6%
Local production infrastructure	31	19.1%
Local postproduction services	23	14.2%
Cannot answer	30	18.5%
Other	8	4.9%
Total	351	216.7%

TABLE 9. Importance of various incentives for bringing production to Estonia (n=162).*

* Percentages are based on respondents.

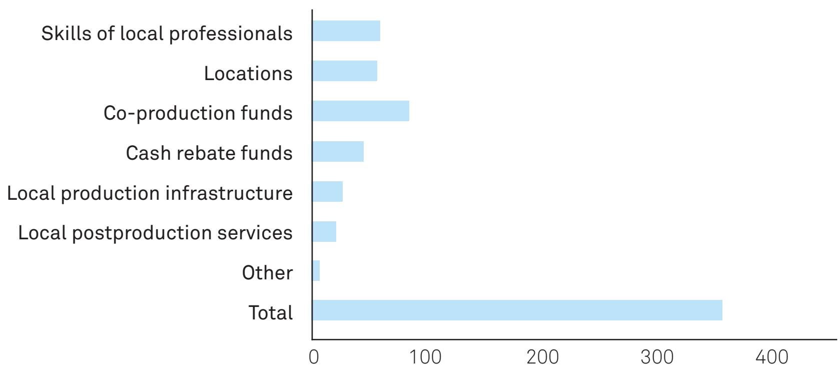

CHART 10. Number of times various reasons for bringing production to Estonia were selected (n=162).

		Region of residence				
		Nordic	Baltic	Rest of Europe	Outside Europe	Total
Skills of local professionals	Count	11	9	33	10	63
	% within Region of residence	47.8%	45.0%	38.4%	30.3%	
Locations	Count	13	4	36	7	60
	% within Region of residence	56.5%	20.0%	41.9%	21.2%	
Co-production funds	Count	10	14	45	19	88
	% within Region of residence	43.5%	70.0%	52.3%	57.6%	
Cash rebate funds	Count	10	5	26	7	48
	% within Region of residence	43.5%	25.0%	30.2%	21.2%	
Local production infrastructure	Count	6	5	17	3	31
	% within Region of residence	26.1%	25.0%	19.8%	9.1%	
Local postproduction services	Count	1	5	12	5	23
	% within Region of residence	4.3%	25.0%	14.0%	15.2%	
Cannot answer	Count	3	4	16	7	30
	% within Region of residence	13.0%	20.0%	18.6%	21.2%	
Other	Count	0	2	4	2	8
	% within Region of residence	0.0%	10.0%	4.7%	6.1%	
Total	Count	23	20	86	33	162

TABLE 10. Incentives for producing in Estonia by region of residence.

> We all know that we have on average in the whole of Europe only 15–20% market share available. The rest is American stuff.... Of course, France is different.... But these 15–20% are occupied by domestic films. And then, from the European films, only English and French really travel. So, we have a market share of 3% to 5%. And we are now fighting with thousand and three hundred films for this share. So, you can imagine – it is difficult!

Then again, the Estonian film industry together with PÖFF was several times seen as a contributor to the variety of the European film world. *Tangerines*, *November*, *Mother* and *The Fencer*, for example, were acknowledged as successes in international markets.

Survey respondents who were interested only in buying and not selling Estonian films (n=5) said that the reasons for the success of Estonian films were their exoticness, good storytelling, originality and talented directors. Reasons for the international failure of Estonian films were seen in the difficulties in promotion, lack of funds and the specific humour in the films.

SETTING UP A BALTIC BRAND

The study also asked the foreign professionals for concrete recommendations for improving the status of the Estonian film industry. Some policymakers in the focus groups thought that the key to international success was to 'remain as Estonian as possible', stressing the ambivalent uniqueness of Estonian productions. Some salespeople believed that the breakthrough would happen by itself and that Estonia just needed one key film to open up the markets.

Talking about selling films to Estonia, however, several sales professionals described Estonia as a good market to do business in. In that respect, the Baltic region was usually viewed as a whole. It appears, too, again, that unproblematic and personal cooperation was a key element to working in a small market such as Estonia. As a sales agent from the UK said:

> But I feel that the Baltics is like ... it's one of my favourite territories to sell; and I sell a lot. [---] I just love the distributors; a few of them.... I only work with a few of them. And it's always very easy – they're very honest, very quick. No problems with negotiation.

In relation to that, the most poignant recommendation for the Estonian film industry from the focus group interviewees was to follow the example of the Nordic countries and set up a Baltic fund for international co-productions as well as creating a Baltic brand for the films that would help with selling them internationally. It was seen that there was not enough room or money for establishing an Estonian film brand that would stand on its own. As a Czech film festival representative explained:

> I actually do kind of treat the region together and it ... there's regionality in the Baltics, so for me, that is specified by Estonia. I can't really put a finger on it, but I can sense it and feel it and I don't think I desperately need to have another brand that is Estonian films specifically.

A producer from Finland advised:

> For example, in the Nordic countries, we have this Nordic Film and TV Fund, which is for Scandinavia and Finland. So, maybe the Baltic countries could have a similar fund....

And a German producer said:

> Maybe it's ... it would be clever to market your films together as Baltic films because you don't have enough money. Otherwise you will not get recognition. [---]

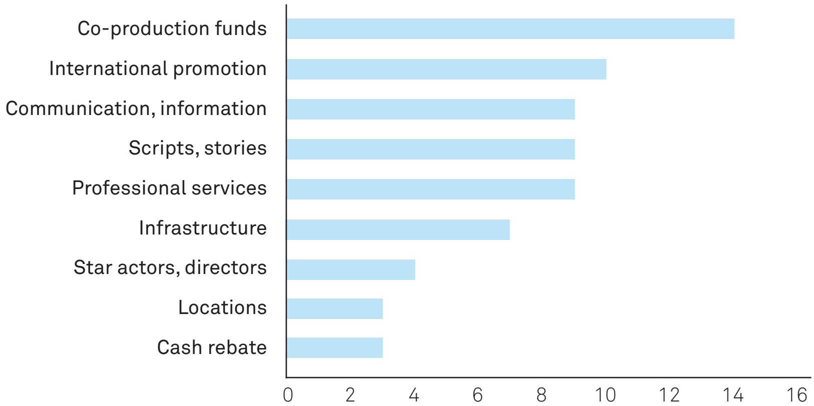

CHART 11. Areas of improvement to make the Estonian film industry more attractive for co-productions.

CHART 12. Most popular reasons for shooting a film in Estonia.

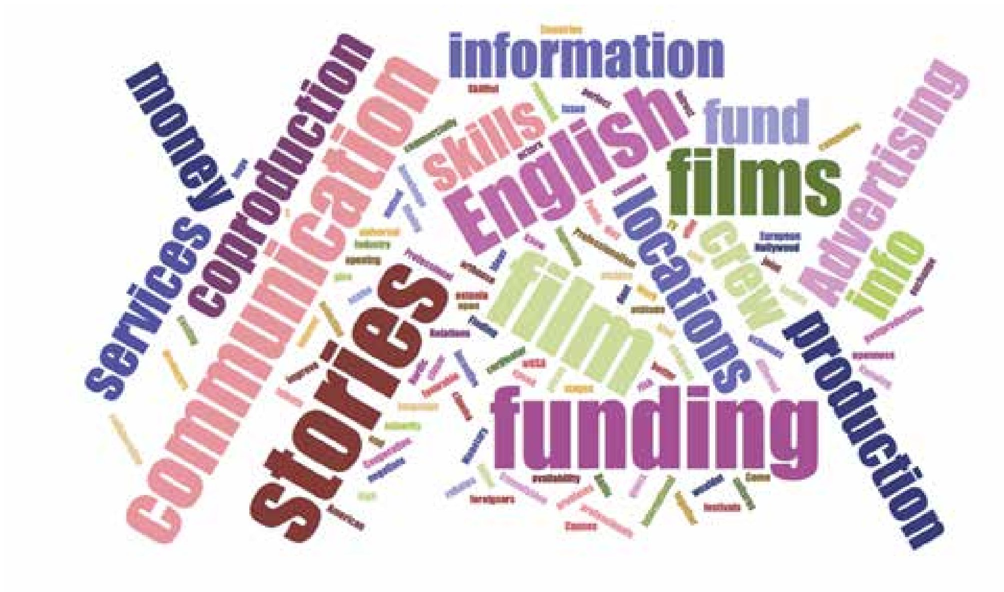

CHART 13. Most popular words describing what could be improved to make Estonian cooperation more attractive.

	Frequency	Percentage
Other (please specify)	19	13.8
I am interested in selling international films to Estonia	81	58.7
I am interested in buying Estonian films for international markets	8	5.8
Both of the above	30	21.7
Total	138	100.0

TABLE 11. Specific interests in relation to the Estonian film industry and distribution.

			Binary role		
			Production	Distribution	Total
What is your main interest in terms of distribution to or from Estonia?	Other (please specify)	Count	12	6	18
		% within role	12.4%	17.1%	13.6%
	I am interested in selling international films to Estonia	Count	66	12	78
		% within role	68.0%	34.3%	59.1%
	I am interested in buying Estonian films for international markets	Count	3	5	8
		% within role	3.1%	14.3%	6.1%
	Both of the above	Count	16	12	28
		% within role	16.5%	34.3%	21.2%
Total		Count	97	35	132
		% within role	100.0%	100.0%	100.0%

TABLE 12. Specific interests in relation to the Estonian film industry and distribution by role.

> I would suggest – go for it as Baltic film! Create a new wave from the Baltics. Put all the money in one pot and ... you know? The best films – every year five films – and promote them like hell.

The interviewees with experience in working with Estonians agreed that there should be at least one company specialising in promoting Baltic films. In relation to that, a Lithuanian producer implied that an impression of Baltic togetherness should be sought at international film festivals, to strengthen the Baltic brand. As the Lithuanian producer said:

> In Cannes Film Festival from Village International to Pantiero, where there's Lithuania and Latvia because everyone comes and says, 'Baltics ... let's go to Baltics', and Estonia is somewhere in another place. And in the beginning, Lithuania and Latvia were in different places. But then, Lithuania and Latvia came together and Estonia – no.

The references to the potential organisational unity of the Baltic states are even more interesting against the backdrop of recent developments such as the Estonian Minister of Culture announcing that Estonia is seeking membership of the Nordic Film & TV Fund.[4] This raises questions about the discrepancies between 'where Estonia would like to go' and 'where others see Estonia going'.

CONCLUSION

This article showed that foreign film professionals who have co-produced with Estonian filmmakers are likely to be satisfied and open-minded about future collaborations. As film production activities with Estonians and in Estonia are supported by the new Estonian cash rebate system, one could expect a rise in the number of new co-productions, especially given the support of universally acclaimed platforms such as PÖFF, EFI and Industry@Tallinn.

While our survey sample could be understood as relatively small – only 228 respondents – it should be well representative of the population of film professionals who have some experience with Estonia, its films and its film industry. It is possible that people with positive previous experiences may be overrepresented as they have returned to attend the local film festival. Yet, our triangulation of methods and the combined use of a survey and focus group interviews helped us to learn about a larger variety of experiences. This is especially so, since the focus group interviews also included participants with little or no knowledge of Estonia. That cohort helped us to obtain views and expectations of the general nature of the population of film professionals in Europe and around the world.

As many professionals suggested, maintaining a consistent interest in co-productions is vital for a small country like Estonia to gain international recognition and build awareness of its film industry sufficient to succeed in the tough competition for a limited share of foreign language films in the global market. The present study is another affirmation of a cliché: being small entails disadvantages, such as being left unnoticed, as well as opportunities, such as being able to offer flexibility and one-to-one approaches. To take advantage of these opportunities, a well-deserved reputation for hardworking and achievement-oriented filmmakers and unproblematic business operations needs to be accompanied by strategic communication and promotion, no matter whether as part of the Baltic, Nordic, specifically Estonian or mixed identity. Hopefully, some of the findings of this survey provide ideas to achieve that.

4 See http://www.kul.ee/et/uudised/eesti-film-saanud-tiivad.

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