

Summary of  
debates and  
proposals

**1<sup>st</sup>** Agenda for the  
restart of  
the audiovisual  
sector

# Spicine Forum

---

Copyright © – Iniciativa Cultural -  
Instituto das Indústrias Criativas

All rights reserved.

Unauthorized reproduction of  
this report, in whole or in part,  
constitutes a violation of copyright  
(Law nº 9.610/98). This research  
complies with current laws on the  
security and protection of personal  
data (applicable data protection  
laws), Federal Law No. 13.709/2018 -  
General Data Protection Law (LGPD).

---

Organized by



---

Sponsored by

The Spicine logo consists of the word "Spicine" in a bold, sans-serif font, with a glowing, circular light effect behind the letters.



# Summary

---

## Foreword

---

### Executive summary

1. Brokers / Sectors

2. Points of discussion and takeaways

---

### 1<sup>st</sup> Spcine Forum

Agenda for the restart of the audiovisual sector

Full schedule

---

### 1<sup>st</sup> Spcine Forum

Agenda for the restart of the audiovisual sector

Summary of panels

---

### Opening ceremony

Relevance of an agenda for the restart of culture

---

### Panel 1

Production and dissemination of data from the audiovisual sector

---

### Panel 2

Attracting international productions and investments

---

### Panel 3

Incentives and investments in economic development

---

---

### Panel 4

Audiovisual events and the challenges of promoting diversity

---

### Panel 5

Audience development for Brazilian audiovisual

---

### Panel 6

Bridging the gap between professional training and the market with a focus on diversity

---

### Panel 7

The new audiovisual frontier - Games e XR

---

### Panel 8

The socioeconomic impacts of *film commissions* on cities

---

### Panel 9

“Glocal” progress: strategic dialogues for the consolidation of the development of the Brazilian audiovisual

---

### References

---

**1<sup>st</sup> Spcine Forum**

**Agenda for the restart  
of the audiovisual sector**

**Foreword**

- 1 Spcine is a cinema and audiovisual agency from São Paulo, an initiative of the São Paulo City government, focusing on the development of the cinema, TV, games and new media sectors.
- 2 The videos of the panels are available on the Spcine YouTube channel.
- 3 Spcine. Socioeconomic impact on the audiovisual sector from 2015 to 2021.

---

## Foreword

May 2022 was an important moment for the Brazilian audiovisual sector. During this period, two elements worried the audiovisual industry: the coronavirus (Covid-19) pandemic, which, at first, severely reduced the volume of work, and the federal government policy, of low priority for the areas of art and culture.

The need for actions that encourage and the audiovisual sector in promoting an environment of continuity, with the creation of institutions and stable public policies, is an old demand from professionals in this industry. Initiatives by Spcine - São Paulo's City Cinema and Audiovisual Agency<sup>1</sup> - itself, in addition to a resumption of audiovisual production due to the increased demand for audiovisual works, since people had to stay at home because of the pandemic, and due to the entry of new players in the national market, ended up signaling to professionals, companies and institutions that the sector should act to seek this continuity amid so many transformations in the post-pandemic period and how the audiovisual sector is strategic for the economic recovery.

Understanding that this combination of factors is a good opportunity to discuss paths and ways to implement them, the Spcine Observatory held the **1<sup>st</sup> Spcine Forum - Agenda for the restart of the audiovisual sector**, between May 10 and 12, 2022, at Centro Cultural São Paulo, with a live broadcast on the Spcine YouTube Channel<sup>2</sup>.

Reaching a wide audience in person and online, the 1<sup>st</sup> Spcine Forum discussed relevant issues regarding the current audiovisual situation in São Paulo, addressing topics such as attracting international investments, the promotion of diversity in audiovisual education and at exhibitions and festivals, audience development for Brazilian productions and the impact of *film commissions* in cities, others. Spcine Observatory also released data regarding the economic impacts of the audiovisual sector for the city of São Paulo from 2015 to 2021<sup>3</sup>. The sector reached 1.5 million people through direct and indirect employment and moved R\$ 5 billion, creating 210,000 direct jobs (which represents 26% of Brazilian audiovisual) and more than 290,000 indirect jobs.

In the three days of the event, the YouTube live broadcasts had 2,300 views, and more than 1,000 people attended in person.

Spcine sponsored this publication to facilitate access to the main points discussed during the Forum. It presents a summary of the panels and the takeaways from the event, intending to support the drafting of municipal public policies, actions by the private sector, and policy recommendations to be adopted by universities and the third sector.

### Spcine Observatory

# Executive summary

The **1<sup>st</sup> Spcine Forum - Agenda for the restart of the audiovisual sector** raised interesting points, both in the formulation of public policies and in the actions carried out by the private sector, the third sector, and universities. The panels that took place in May 2022 addressed issues specific to each of the segments of the audiovisual sector but also cross-cutting topics common to all areas and stages of production. This summary outlines the discussions with two focuses: the first highlights questions relative to specific stakeholders, and the second concentrates on the points discussed.

---

## 1. Stakeholders / Sectors

---

### 1.1 Academic

---

### 1.2 Public sector

---

### 1.3 Private sector

---

## 2. Points of discussion and takeaways

---

### 2.1 Strengths of the Brazilian audiovisual sector

---

### 2.2 Barriers and challenges

---

### 2.3 Specific points

---

### 2.4 Public policy recommendations and other actions focused on the audiovisual economy

---

### 2.5 Recommendations for Spcine

---

# 1. Stakeholders / Sectors

---

## 1.1 Academic

The Forum pointed out the need for studies and models that address the actual economic dimension of the audiovisual sector. Only a complete segment map will make it possible to identify bottlenecks, investment needs, and the creation of medium and long-term projections. Academia can provide the depth and method required by this project's scope.

---

Academia can also act in selecting, compiling, and analysing data, which requires deeper structuring. The 1<sup>st</sup> Spcine Forum presented several data collection and organization initiatives, but they lack a broader formulation that creates organicity. An "external" view such as that of academia could establish *benchmarks* and some indicators where the sector recognizes itself and with which everyone can talk.

---

The area of education, mainly the corporate one, is perhaps where a more immediate contribution from the academy can occur. Courses, specializations, and MBAs that consider and incorporate audiovisual specificities into their curricula would be welcome. Many entrepreneurs in this field come from a technical or artistic background and have little familiarity with management science. Two initial focuses could be the support for developing own business models and the training and management of human resources, an issue widely discussed during the Forum.

---



---

## 1.2 Public sector

The debates during the 1<sup>st</sup> Spcine Forum addressed the deep connection between the audiovisual sector and the government, whether through regulation for production, distribution (quota system) or dependence on incentive laws. This deep connection, which involves three different spheres (federal, state and municipal), requires additional efforts from the sector. Each sphere responds to several cultural and political views according to the current situation. However, a few points should be part of a minimum agenda in the dialogues of the sector with the government:

---

Organization of a *framework* for developing and monitoring the cycle of public policies focused on audiovisual (formulation, implementation, monitoring, evaluation, and improvement of public policies).

---

Discussion on the continuity of public policies, which is one of the main factors in attracting investments or not, as it deals with predictability and legal certainty. Reflection on this point is valid for both regulation and production incentives. To be able to decide and plan, private agents need clarity about whether a benefit will be temporary or permanent and whether it will be a specific policy that is part of an administration vision or intended as a more permanent State policy.

---

The participants also mentioned a change in bureaucracy as a possible contribution by the public sector. Despite being a more operational issue, it impacts the productions' day-to-day. The points raised do not specifically question the need or not for registrations, forms, or authorizations but rather the clarity of the procedures and the deadlines for responses.

---

### 1.3 Private sector

The private sector in the audiovisual chain has a wide variety of companies. Participants of the 1<sup>st</sup> Spcine Forum mentioned equipment leasing, game production and technology companies. Each type of company has needs and particularities that point to contributions and differentiated demands. But there are some common issues that, if worked collectively, could contribute significantly to the business development of the sector as a whole:

Professionalization of management. Several companies originate from family ventures or the joining of partners, often coming from technical or creative areas. This origin, combined with the diversity of sub-areas within the audiovisual sector and the differences in size, requires a vision based on specific business models. Some reports revealed a concern with the “accordion” effect: the need for rapid expansion when there is an increase in demand and difficulty in reducing during periods of downturn. It denotes a reactive action, which always seems to be at the mercy of the context. If the ups and downs are truly intrinsic to this market, your business model must be adapted to deal with this. For example: establish, as far as possible, the interval between these seasons, what cash flow is necessary to deal with these highs and lows, and verify how to negotiate in terms of contract policy with *streaming* companies to minimize these effects, etc. Participants mentioned SEBRAE (Serviço Brasileiro de Apoio às Micro e Pequenas Empresas, or Brazilian Micro and Small Business Support Service) as an entity that could contribute to this. Based on its experience, SEBRAE could create, together with the sector, some “Audiovisual Business Scenarios”, a *guide* to advise not only established companies but also those who want to be entrepreneurs in this sector.

Another issue often mentioned as a critical point was the need for training. This shortcoming is perceived horizontally in the various types of companies (rental, production, etc.) and vertically in the construction of organizational and management chains within companies. The reports also included some attempts at solutions already being used, such as internship programs with *on-the-job* training and courses; however, these initiatives are seen as limited and are not the ultimate object of these companies’ activities. One suggestion is a partnership with entities linked to education, mainly technical, such as SENAI (Serviço Nacional de Aprendizagem Industrial, or National Service for Industrial Apprenticeship) and SENAC (Serviço Nacional de Aprendizagem Comercial, or National Service for Commercial Apprenticeship). It is necessary to point out that this referral would not exempt the sector from participating in the creation of courses to supply the required training. The 1<sup>st</sup> Spcine Forum emphasized that the need for training must come with appropriate theoretical support; however, it cannot ignore aspects of everyday production practice, especially considering the specific conditions of the Brazilian market.

There’s a need to develop a corporate culture of human resources specific to the audiovisual sector. Within the sector’s business and training needs, questions arose concerning business in general, but which, in the view of the Forum participants, would require specific adaptations when we think about the sector’s development. They refer to: **(1)** the fact that it is an industry that deals with the symbolic and the intangible; and **(2)** the need to find ways to incorporate inclusion policies in both operational and creative areas. When discussing the need for inclusion, the mentions were mainly to issues of gender and race/ethnicity, but not exclusively. The debates examined ways of being open **(1)** to produce for these audiences, which usually are not the target audience; **(2)** to include them in the workforce, avoiding discriminatory recruitment policies; and, finally, **(3)** to incorporate these people’s worldviews into the core of the works. Participants recognize that tackling these three aspects is complex and not exclusive to the audiovisual sector. They mentioned that sharing experiences at the 1<sup>st</sup> Spcine Forum was already an important step and praised the initiative of specific panels for this purpose.

## 2. Points of discussion and takeaways

### 2.1 Strengths of the Brazilian audiovisual sector

Brazil is promising, with an attractive economic scenario and huge growth potential. There are beautiful landscapes, and Brazilians are talented and creative. In addition, it is a country that consumes a lot of audiovisual products because there is a high number of people with internet access, with a daily consumption of almost seven hours.

The *streaming* growth in São Paulo and Rio de Janeiro, associated with the arrival of international *players*, created an intense dispute between platforms and producers and a demand for local content, expanding the market for new productions.

The increase in demand for local content, accelerated by the pandemic, has an even superior potential for attracting international investments, not only of a financial nature but also of institutional recognition. Consequently, there is job generation and a greater need for infrastructure, with the import of equipment, creative development, and encouragement of the production and commercialization of Brazilian content, whether locally or internationally. Creation of a virtuous cycle of investment and improvement of the sector.

Restoration of the institutional security of the National Cinema Agency (Ancine).

The audiovisual sector has a strong potential for creating *soft power* — the power of subtle influence, conviction, imagination over our people or country, or self-esteem among the populations of the places where filming happens. It reinforces the vision of cities and Brazil as centres for creating and disseminating culture and of a country that produces movies.

Advantages of the audiovisual industry: it is not slow as other industries that require installations (there is no need to set up a factory or to implement fixed machinery; productions can take place on the streets). The attractiveness — and its highest value — is the city itself. The sector can promote change, generate local investment, and employ people soon after arriving at a location.

Strengths of the city of São Paulo in attracting filming: **(a)** it is a place of great cultural diversity; **(b)** good infrastructure; **(c)** undervalued national currency (real); and **(d)** local incentives, such as *Cash Rebates* and the new decree regarding filming in residential areas.

---

## 2.2 Barriers and challenges

**Human resources** - Shortage of skilled labour, especially among technicians *below the line*. Lack of training for executives and entrepreneurs. There's a need to improve the skills of creative technicians with an emphasis on training and knowledge, especially of interpersonal and professional relationships, for the industry to grow sustainably. The courses available in the country are very distant from market needs.

---

**Inclusion** - The transformation and improvement of the audiovisual market must consider the inclusion of portions of the population that have suffered discrimination, not only with new employment opportunities but also by incorporating their worldview. Decentralization is also part of inclusive measures, as there is a concentration in the Southeast to the detriment of other regions of the country.

---

**Work environment** - There are cases of violence, racism, and bullying on film sets. These problems are more general and, in Brazil, occur in several fields of work, but the audiovisual production sector must address them.

---

**Incentives and legal framework** - The need to balance incentive and regulation (there is a lot of emphasis on the latter). It is critical to advance the VoD regulation to guarantee the rights of domestic producers, national entrepreneurs, and independent producers.

---

**Audience development for the Brazilian audiovisual industry** - The need to consider access as a citizen's right. Today the choice is limited due to the small number of films taking all movie theatres.

---

**Audience development must consider Brazilian cinema** - Broadcast television is still the most accessible way to watch Brazilian movies; however, only 5% of the films aired in this medium in 2021 are of national origin. One essential measure to encourage Brazilians to watch more domestic movies is boosting the production of films for kids. That way, children will grow up watching Brazilian movies, developing a taste for them at a young age.

---

**Diversity** - Developing audiences also means working on diversity in programming and encouraging all types of people to produce movies. Diversity of race, sexual orientation and all others are essential to deepening the understanding of life based on the experience that cinema provides to everyone.

---

**Circulation** - It is necessary to look at the diversity of Brazilian production and seek incentive models that include the circulation of all works of all types, not just parts of them.

---

---

### **Production and dissemination of data on the audiovisual sector:**

- There is a lack of data to help understand the actual economic dimension of the industry and its production. These gaps are not exclusive to the audiovisual sector.
  - The variety of activities and fields of action make it difficult to systematize information.
  - There is a problem with underreporting of data. The audiovisual sector accounted for a significant percentage of the Brazilian GDP, but the official data doesn't include this information. Existing indicators do not contain several creative economy professionals who are informal workers.
  - There are difficulties in the preparation of surveys, data visualization and analysis.
  - Lack of qualification to work with data. How to convert data into information? Today it is necessary to have specialists to formulate questions and direct the analyses.
  - Data ownership and privacy - Use of data by large corporations; racism in algorithms.
- 

### **Challenges:**

- The dissemination of a culture of production and use of data.
- The need to develop methodologies for producing, processing, and analysing the most crucial data representative of different population segments. This data needs to consider the specificities of the places and have an inside perspective.
- The importance of evaluating the research methodologies, as the Brazilian reality does not allow direct transposition of methods from abroad.
- The conversion of data into actionable information - The need to review the language of the presentation of the data to expand access to information.
- The importance of different public and private institutions joining forces to improve production, systematisation and data usage in the country. The relevance of developing partnerships with knowledge centres.

### **Opportunities - Experiences and possibilities:**

- Spicine aims to be a data aggregator for the sector.
  - Creation of networks for methodologies sharing (data\_labe).
  - Existence of public databases (IBGE).
-

---

### Attracting international productions and investments:

- The increase in demand faces infrastructure and labour problems.
  - Decrease in federal government initiatives.
  - Exchange rate and import taxes.
  - Expectations of incentives and *tax credit* by different levels of government.
  - Fears about regulation.
  - The need to consider various business models that suit the sector's diversity.
  - Continuity and communication of public policies such as *Cash Rebate*.
- 

### Opportunities - Experiences and possibilities

- Increased demand for productions in the post-pandemic period.
- Brazil is attractive as a setting for productions and also for the volume of the audience.
- *Cash Rebate*.

---

### Expansion of the process of internationalization of production in the city of São Paulo

#### Challenges:

- Unlocking bureaucracies that hinder production.
  - Training of technicians, especially those working in international productions.
  - Avoiding market concentration in major producers with the largest operating capacity and cash flow; ensuring the coexistence of companies of different sizes and various business models.
- 

### Diversity and representation:

- Race and gender are issues addressed, with curators focused on black female directors and black male directors and work teams made up of black people, women, and LGBTQIA+ people.

## 2.3 Specific points

### *Film commission*

Film commissions are organizations, state-owned or parastatal, dedicated to attracting and encouraging the production of audiovisual works at their place of operation, supporting producers during the filming phase and being the connection between them and the government and private bodies in the region.

The need for a legal framework with clear laws guiding the performance of a *film commission*. Lack of clarity in legislation regarding the use of locations and economic incentives may also hamper production in some cases.

Positive points: these organizations contribute to the development of the local audiovisual sector by playing a role in attracting filming. They promote coordination and interaction between the public and private sectors. Their action improves public policies, causes a reaction from the private sector, and strengthens the local industry.

#### Challenges:

- how a *film commission* contributes to the development of the local audiovisual sector;
- their role in attracting filming;
- the difficulties in creating this type of organisation; and
- their operational difficulties.

Factors contributing to a film commission's success: the existence of a consolidated legal framework providing security for local and foreign investors; the capacity for coordination between various bodies and agencies; simplification of bureaucratic requirements; and joint work between producers and the government.

### "Glocal" progress - Challenges

Leading complex processes involving locations with very diverse cultural values and socioeconomic conditions, cultural diversity, variety in the technical capacity of professionals and management, and the local dynamics of operation of different segments and their markets.

Reconciling the increase in demand and upskilling of the labour force in the Brazilian audiovisual industry with local requests for inclusion and diversity in this segment.

Audience consolidation - What audience do we want to reach? What are the terms for the dialogue of the audiovisual sector with the Brazilian population?

---

### Inclusion policies

The difficulties black people face in accessing training to work in the audiovisual market are similar to inclusion problems in other areas. Therefore, the audiovisual sector needs to create inclusion policies.

These policies should not only recruit black people to work but also encompass the appropriation of technologies, and cinematographic and audiovisual language, fostering visibility, representation, and access. This incorporation needs to consider not only the workforce of black people but their different perspectives on society and Brazil.

### Games and XR

The gaming and XR market is large and has potential for growth.

Issues that interfere with the development of these segments: cost of equipment and workforce in need of upskilling or reskilling. There are difficulties in acquiring equipment, especially for developers (good machines are very expensive).

There is a lack of qualified professionals. A detrimental factor in training is the division between digital game courses *versus* game design courses.

Funding is insufficient. Existing funding programs are lacking, and the gaming segment still doesn't have many incentives and support.

Regarding the contents, it is necessary to promote innovation since the games' narratives are homogeneous, with a Eurocentric influence.

A rich and dynamic city like São Paulo still has no development hub in that area.

One obstacle is high taxes, as games fall into the gambling category.

Most companies are not formalized, complicating the collection of documents required to participate in public funding calls and to apply for funds.

In the face of these challenges, good Brazilian developers end up being hired by the international market, which pays in hard currencies, making it difficult to retain talent in the country.

Challenge: The recruitment of young people from the periphery for these productions is paramount. Part of this population feels disbelief towards public policies, institutions, and their future. Programs linked to the universe of games and XR, which tend to be attractive to young people, can change that sentiment, promote the training of young people, and contribute to the generation of wealth.

---



## 2.4 Public policy recommendations and other focused actions for the audiovisual economy

Formulation, implementation, monitoring, evaluation, and improvement of public policies for the audiovisual sector.

Recognition that the audiovisual sector depends on the government, especially in the context of the restart of the audiovisual economy in the post-pandemic period.

Implementation of programs to promote audiovisual production through funding public calls, tax incentives, partnerships, etc. The need for the continuity of these policies to provide institutional security and attract private and international investments.

Importance of public incentives at the federal level, as all changes that occur in this sphere end up impacting states and municipalities, since many works are composed of multiple financing.

Recognition that public incentives acts as an inducer of private resources.

Implementation of joint actions between different public administration bodies (e.g.: culture, education, tourism, etc.), between different governmental levels (federal, state, and municipal) and between branches (executive and legislative).

Creation of specific public policies for diversity, including black producers, women, and the LGBTQIA+ audience. Affirmative actions must consider the number of directors approved and the number of financial resources allocated to their projects based on economic, territorial, ethnic-racial and gender criteria, ensuring the presence of LGBTQIA+ filmmakers and filmmakers from the periphery.

Incentives for the new initiatives created in the periphery are essential.

Implementation of upskilling and reskilling programs for professionals in the sector (especially in the categories *below the line*).

Training and sustainability: establishment of permanent training and upskilling programs that combine theory and practice, that is, a technical qualification combined with experience on set. It is also necessary to provide opportunities for these activities to become perennial rather than seasonal.

Professional training: due to the increase in interest in working in the area, workshops can be held at various locations, especially in the periphery of São Paulo.

Training professionals who are socially vulnerable and who need support from public policies. The State must invest so that these people are able to actually be visible.

Audience development in a continuous, diversified manner and encompassing audiences of various ages. Audiovisual education in schools, with the development of a critical view of audiovisual products.

---

Creation of mobilization initiatives and networks to watch movies and hold conversations based on them. Organisations, producers, and distributors can help with this process. Circulation beyond commercial movie theatres.

---

Seeing audiovisual as a right, not just a market. Considering the existence of various economies within the audiovisual sector, not only the market that does not include the productions coming from the periphery. Profit is not the sole objective. The sector must seek to foster the economic and cultural audiovisual ecosystem with tax exemption initiatives for producers from less privileged origins and recognize movie clubs, screenings in unconventional spaces, etc., as integral parts of the broader audiovisual distribution circuit.

---

Encouraging new *film commission initiatives*.

---

Gathering and supplying data to facilitate decision-making and product planning. Gathering and disseminating reliable and significant data about the audiovisual sector: a data system that considers “glocal” issues necessary to consolidate the development of the Brazilian audiovisual.

---

Policies and programs related to universe games and XR:

- Implement policies to encourage and enable the purchase of equipment.
  - Creating training and inclusion programs for young people from the periphery — in the audiovisual production in general and focusing on the universe of games and XR.
  - Creating a game and XR production hub in São Paulo.
  - Reducing taxes (games are classified as gambling).
  - Encouraging the formalization of companies operating in the segment to facilitate participation in public bids and/or public calls.
  - Creating incentives for talent retention in the country.
-

---

## 2.5 Recommendations for Spcine

Challenges related to human resources and how Spcine could contribute:

- Mapping professionals in all areas to a database to help maintain the audiovisual economy.
  - Fostering the potential of the professionals in the audiovisual sector, especially *below-the-line* technicians, who are very neglected.
  - Investing in training for executives and entrepreneurs.
  - Maintaining the *Cash Rebates*.
  - Besides government funding, there's a need to foster other business models, as that is the key to the perception of a healthy industry.
-

**1<sup>st</sup> Spcine Forum**

**Agenda for the restart  
of the audiovisual sector**

**Full schedule**

---

## Opening ceremony

### Relevance of an agenda for the restart of culture

---

#### Participants

**Ricardo Nunes**

Mayor of São Paulo

**Aline Torres**

Culture Secretary of the City of São Paulo

**Viviane Ferreira**

President of Spcine

**Fred Mascarenhas**

Chief of Staff of the Secretariat of Culture and Creative Economy of the State of São Paulo

**Fábio Riva**

Councillor of the City of São Paulo

**Eli Correa**

Councillor of the City of São Paulo

**Thammy Miranda**

Councillor of the City of São Paulo

**Eduardo Suplicy**

Councillor of the City of São Paulo

**Marta Suplicy**

Secretary of International Relations of the City of São Paulo

**Mauro Garcia**

Executive President of Brasil

Audiovisual Independente

[Brazil Independent Audiovisual] - BRAVI

---

**Host****Victor Hugo Batista Pires**

Spcine Observatory Coordinator

---

## Panel 1

### Production and dissemination of data from the audiovisual sector

---

**Panellists****Gilberto Vieira**

Cofounder of data\_labe

**Jader Rosa**

Manager of the Itaú Cultural Observatory

**Leonardo Athias**

IBGE [Instituto Brasileiro de Geografia e Estatística (Brazilian Institute of Geography and Statistics)] Researcher

---

**Moderator****Alessandra Meleiro**

Universidade Federal de São Carlos (Federal University of São Carlos)

---

## Panel 2

### Attracting international productions and investments

---

**Panellists****Andressa Pappas**

Motion Picture Association - MPA

**Cibele Galvão**

Electrica Cinema e Vídeo

**Edison Viana**

Moonshot Pictures

**Gustavo Mello**

Boutique Filmes

---

**Moderator****Steve Solot**

Olsberg SPI

day 1

---

### Panel 3

## Incentives and investments in economic development

---

#### Panellists

**Aline Oliveira Cordeiro da Silva**

Superintendent of Funcultura de Pernambuco

**Bárbara Oliveira**

Creative Economy Manager at the Banco Nacional de Desenvolvimento Social (National Bank for Economic and Social Development) - BNDES

**Débora Ivanov**

Audiovisual Producer and Secretary Director of SIAESP - Sindicato da Indústria do Audiovisual do Estado de São Paulo (Union of the Audiovisual Industry of the State of São Paulo)

**Léo Edde**

Producer, Director and Founding Partner of Urca Filmes

---

#### Moderator

**Karen Castanho**

Founding Partner of Biônica Filmes

### Panel 4

## Audiovisual events and the challenges of promoting diversity

---

#### Panellists

**Renata Almeida**

Mostra Internacional de Cinema em São Paulo (São Paulo International Film Festival)

**Rodrigo Antônio**

Festival Internacional do Audiovisual Negro do Brasil - FIANb (International Black Audiovisual Festival of Brazil - FIANb) and Associação dos Profissionais do Audiovisual Negro - APAN (Association of Black Audiovisual Professionals - APAN)

**Well Amorim**

Maloka Filmes

**Zita Carolhosa**

Curta Kinoscópio

---

#### Moderator

**Fernanda Lomba**

President of the Institute Nicho 54 and Partner and Executive Producer at MUNDI

### Panel 5

## Audience development for Brazilian audiovisual

---

#### Panellists

**Adhemar de Oliveira**

Programming Director at Espaço Itaú de Cinemas

**Carol Misorelli**

Taturana

**Fábio Lima**

Sofá Digital

**Licínio Januário**

Wolo TV

---

#### Moderator

**Kiko Mollica**

Journalist and Director at Km 70 Production Company

## Panel 6

### Bridging the gap between professional training and the market with a focus on diversity

#### Panellists

##### Ariel Nobre

Trans Mercado

##### Janaína Oliveira

RAIO

##### Taina Xavier

Fórum Brasileiro de Ensino de Cinema e Audiovisual - FORCINE (Brazilian Forum for the Teaching of Cinema and Audiovisual Studies)

##### Sonia Santana

President of the Sindicato dos Trabalhadores na Indústria Cinematográfica e do Audiovisual (Union of Workers in the Film and Audiovisual Industry) - SINDCINE

#### Moderator

##### Priscila Machado

Instituto Criar

## Panel 7

### The new audiovisual frontier - Games and XR

#### Panellists

##### Érika Caramello

CEO Dyxel Gaming

##### Jorge Groove

VR Games Creator

##### Rodrigo Terra

Abragames

##### Silvana Bahia

Olabi

#### Moderator

##### Simone Kliass

Founder and Vice-President of XRBR

## Panel 8

### The socioeconomic impacts of film commissions in cities

#### Panellists

##### Georgia Costa

Coração da Selva e Brasil

Audiovisual Independente - BRAVI

##### Guillermo Saldaña

Mexico City *Film Commission*

##### Luiz Gustavo de Oliveira

Ilhabela *Film Commission*

##### Sol Mayoral

Buenos Aires *Film Commission*

#### Moderator

##### Mauro Garcia

Executive President of Brasil Audiovisual Independente - BRAVI

## Panel 9

### “Glocal” progress: strategic dialogues for the consolidation of the development of the Brazilian audiovisual

#### Panellists

##### Georgia Costa

Brasil Audiovisual Independente - BRAVI

##### Marianna Souza

Associação Brasileira da Produção de Obras Audiovisuais

[Brazilian Association for the Production of Audiovisual Works] - APRO

##### Rodrigo Antônio

Festival Internacional do Audiovisual Negro do Brasil - FIANb and Associação dos Profissionais do Audiovisual Negro - APAN

**1<sup>st</sup> Spcine Forum**

**Agenda for the restart  
of the audiovisual sector**

**Summary of panels**



10/5/22

# Opening ceremony

## Relevance of an agenda for the restart of culture

### Public officials and civil society representatives in attendance

Ricardo Nunes (Mayor of São Paulo), Aline Torres (Secretary of Culture of the City of São Paulo), Viviane Ferreira (President of Spcine), Fred Mascarenhas (Chief of Staff of the Secretariat of Culture and Creative Economy of the State of São Paulo), Fábio Riva (Councillor of the City of São Paulo), Eli Correa (Councillor of the City of São Paulo), Thammy Miranda (Councillor of the City of São Paulo), Eduardo Suplicy (Councillor of the City of São Paulo), Marta Suplicy (Secretary of International Relations of the City of São Paulo) and Mauro Garcia (Executive President of Brasil Audiovisual Independente - BRAVI)  
**Host:** Victor Hugo Batista Pires (Spcine Observatory Coordinator)

### Public policies for the audiovisual sector

The opening panel of the 1<sup>st</sup> Spcine Forum, which discussed the relevance of an agenda for the restart of culture, emphasized the need to integrate the dynamics of public policies in the audiovisual sector, through the formulation, implementation, monitoring, and improvement of such policies, as Spcine has been doing since its foundation in 2015.

### Restart of the audiovisual economy in the post-pandemic period

The restart of the audiovisual economy in the post-pandemic period must include an effort to improve the sector, which can only occur through dialogue between the various stakeholders. Given this need, the 1<sup>st</sup> Spcine Forum brought together government authorities, civil society, and other stakeholders in the sector to reflect on the necessary improvements for the next cycle of the restart of the political economy of the audiovisual in the city of São Paulo.

Among the initiatives contributing to the restart of the audiovisual industry in the capital of São Paulo is the partnership between Spcine, a São Paulo film and audiovisual agency, with the Municipal Department of Education to use the structure in the Centros Educacionais Unificados [Unified Educational Centres] - CEUs as movie theatres. Concerning its relationship with civil society, the company has been active in issuing film permits, including strictly residential areas, thus improving access to producers and producers. The “Program for Attracting Filming to the City and State of São Paulo - *Cash Rebate*” is a policy to encourage filming in the São Paulo region aimed at attracting foreign or domestic cinematographic productions with great international reach.

---

This panel also highlighted the importance of the public sector in the restart of the audiovisual economy in the post-pandemic period, in the sense that public incentives act as an inducer of private resources. When the government invests in a particular area, it signals to the private sector that there is a strategy, and the private sector begins to view the segment differently. A good example is the performance of the São Paulo *Film Commission*, which is a reference for other cities seeking to combine efforts and resources to boost local audiovisual production.

Another example of this positive investment dynamic was the arrival of *streaming* in recent years with the presence of Netflix in São Paulo and Amazon in Rio de Janeiro, whose actions contribute to expanding production in Brazil. The panel emphasized the importance of joint actions between the various government bodies thanks to the rapprochement between municipal and state agencies, such as the Secretariat of Culture and Creative Economy of the State of São Paulo and the Municipal Secretariat of Culture of São Paulo.

---

### Examples of incentive actions from the Secretariat of Culture and Creative Economy of the State of São Paulo:

---

In recent years, incentive programs worth R\$ 91 million, divided into 27 public funding calls.

---

10,334 projects applied in the audiovisual segment and 901 projects got support.

---

Seven public open calls in 2022 for the audiovisual sector, making R\$ 20.5 million available.

---

R\$ 100 million from ProAC ICMS.

---

A joint initiative with “Develop São Paulo”, the São Paulo government incentive bank, to create two lines of credit: one for working capital and the other for long-term investments, with a total amount of about R\$ 125 million.

---

A joint venture between the executive and legislative branches can also facilitate support for initiatives in this context of economic recovery. These actions involved, for example, the reduction of the Service Tax (ISS) rate, which, in the audiovisual sector, went from 5% to 2%.

The panellists highlighted the institutional strength of audiovisual production in creating a political-cultural vision of a community, through *soft power*, which is the power of co-opting, of enchantment with a city, a region, and a country. Audiovisual production expands the perspective about our culture as a people while spreading the idea of Brazil as a country that produces cinema.

Finally, the panel discussed the need to create specific public policies aimed at diversity in the audiovisual sector, with the inclusion of black producers, women, and the LGBTQIA+ audience.

4 The “Program for Attracting Filming to the City and State of São Paulo - Cash Rebate ” is a policy to encourage filming in the São Paulo region, aimed at attracting foreign or domestic cinematographic productions with a broad international reach, implemented through funding public calls. The incentive reimburses a percentage of the eligible expenses in a cinematographic production in the São Paulo region. It is a vital tool to attract international investments, generate local jobs, make the business viable in São Paulo and place São Paulo in the international film scene.

Confirming the importance of the role of government in promoting audiovisual activities, Ricardo Nunes, Mayor of São Paulo, announced two actions for the area: **1)** the *Cash Rebate* program<sup>4</sup>, a new mechanism for investing in audiovisual production; and **2)** the signing of the decree regulating filming in strictly residential areas, which is considered a major advance for the sector. In 2021, the available funds for the *Cash Rebate* program were R\$ 8 million. In 2022, the funds increased to R\$ 40 million, half coming from the São Paulo city government and the other half from the São Paulo state government, generating income, employment, and the promotion of the city.

#### Data about the audiovisual in São Paulo audiovisual:

Research done by Olsberg on the impact of Covid-19 on the global audiovisual sector revealed that 67% of the expenses of audiovisual production go to other sectors of the economy.

The São Paulo audiovisual sector impacts more than 1.5 million people in the city through direct and indirect jobs, generating from R\$ 5 billion to R\$ 6 billion annually.

São Paulo is the base for 37.5% of the production companies in Brazil and accounts for 26% of the direct full-time jobs in the sector and 20.7% of total salaries.

#### Data on Spcine’s performance:

The Spcine Circuit counts more than 20 screening rooms spread over 17 of the city’s 32 subprefectures, having served over 1.7 million spectators by the end of 2021.

92% of the audiences of Spcine Circuit are classes C, D and E; 50% have never had access to the cinema before due to financial constraints.

Creation of Spcine Play, the first public *streaming* platform in Brazil, with over 1,500 titles and approximately 575,000 views since the beginning of its activities.

Spcine offered workshops regarding actions such as movie clubs and hired 57 agents for training programs at some audiovisual events.

Creation of the Spcine Game incubator, the first and only game incubator in Brazil, handling eight selected projects and now entering its second phase.

Spcine has sponsored 76 events since 2015, spending over R\$ 22 million. In 2021 alone, there were 35 events and R\$ 4 million invested. Between 2015 and 2021, 17% of these events focused on affirmative action.

The estimation is that for every R\$ 1.00 invested by Spcine in these events, the sponsored events generate at least R\$ 3.17.

#### Panellists

Alessandra Meleiro (Universidade Federal de São Carlos) - mediator, Jader Rosa (Manager of the Itaú Cultural Observatory), Gilberto Vieira (Cofounder of data\_labe) and Leonardo Athias (IBGE researcher)

10/5/22

## Panel 1

# Production and dissemination of data from the audiovisual sector

In several areas, Brazil has difficulties in the systematization and use of information to promote economic development. Data shortages occur in many segments, and culture is no exception. This panel discussed some of these gaps and possible ways to try to fill them, highlighting, for example, the importance of joining forces between different public and private institutions to improve the production, systematization, and use of data in the country.

The breadth and diversity of the audiovisual sector — ranging from TikTok to *streaming*, including broadcast TV, pay TV, YouTube, extended reality, games, etc., using different platforms and technologies — render the systematization of information even more relevant. For this reason, it is essential to talk with the various agents, partners, *players* and producers involved to contemplate the several issues related to the sector: What is the real power of the audiovisual production? What is creatively produced? Artistically? Economically? How can we improve dialogue regarding sectors, strategies, and media?

The panel brought representatives from different sectors, such as the third sector and public authorities, to talk about production, management, and continuity in data generation processes to guarantee the collection of historical series and provide more structured analyses. In this scenario, Brazil is lagging. Countries like Argentina and Chile have used data structuring in culture for decades. In Brazil, the data are out of sync, which is why focusing on this issue is paramount. Itaú Cultural, data\_labe and the Brazilian Institute of Geography and Statistics (IBGE) presented some initiatives for data and information production in the cultural industry and, more specifically, in the audiovisual sector, raising relevant points.

In the early 2000s, the IBGE received a demand from the Ministry of Culture that the data related to culture, produced through its continuous research, be treated to generate relevant information for the sector. As a result, the institute produced four publications containing information and indicators based on information systems that bring together all IBGE sources relevant to the cultural sector. To this day, the research produced by IBGE provides information for the audiovisual sector. However, there are limitations. Data on production is well covered, but data on the most creative side of audiovisual activities are more challenging to collect as different sectors are intertwined. It is also challenging to collect streaming data since many services are international and do not publicly report data referring to Brazil, as there are no regulations for this segment. Even with these caveats, it is possible to search for basic municipal and state information from the IBGE bases, as these bases contain data on cultural facilities, making it possible to understand the policies related to the area at the municipal level. Furthermore, searching the National Classification of Economic Activities (CNAE) regarding the registration of companies and their sectors is available.

The data\_labe is in the favelas of Maré, in Rio de Janeiro, and is currently made up of approximately 20 people, from different communities in Rio de Janeiro. The difficulty in collecting information on audiovisual production and distribution in Rio de Janeiro communities, related to the incapacity of that part of the population to see itself in the data, motivated its creation. Over time, they discovered the existence of more than a hundred movie clubs, audiovisual production collectives, and production and distribution spaces, and there were no records of these activities anywhere. They placed this information in spreadsheets, databases, and graphs, which allowed a better visualization of that structure. However, they realized there was still a deficiency of data; the communities were absent in the data because no one told their stories. One possible interpretation is that some data cannot effectively include people.

That's when the concept of "citizen data generation" emerged, which is the production of research and data about "ourselves". A dialogue then began with the IBGE, which partnered with universities and other research institutes to see how they could generate data on this micro territory, helping public managers, institutes, and companies to build better indicators for policy formulation in the area. They realized that it is essential to identify who is creating data production methodologies within universities. They started a search for women, LGBTQIA+, and black people working in the schools of statistics, mathematics, and economics, often alone. Currently, the reports are based on intersections such as race and gender, sexuality and race, and place, race, and gender, creating experimental methodologies for data production. One example was the development of the App CocôZap, which uses a WhatsApp number so that residents can report health violations in Maré. They created a database that tells the story of the lack of sanitation on site, with the creation of indicators on basic sanitation for public managers directly from the location.

Underreporting is a critical issue afflicting those who depend on data to plan and implement actions. In Rio de Janeiro's case, 20% of the population lives in favelas, which is an underestimation. The data\_labe's work has contributed to the better composition of groups and the financing of the data production and decision-making teams. It also sparked an interest in young people, who understand the need to be able to collect the data, cross-check and analyze them, giving visibility to their realities. In the case of culture, the issue becomes even more relevant because young people create a lot of audiovisual material today; therefore, it is necessary to understand how they produce to comprehend the entirety of Brazilian audiovisual production.

Itaú Cultural spoke about its data panel, a tool providing an economic overview of the Brazilian cultural and creative sectors based on three axes: labour market and enterprises, public funding for culture, and international trade of creative works and services. The

panel uses IBGE databases, processing 10.5 million pieces of data to provide 880,000 pieces of data, making it possible to carry out panoramic analysis and provide instruments for the sector. The data indicated that in 2022 there was a growth in the creative economy compared to the previous two years. However, this does not mean that there is necessarily a real increase, since half of the professionals in the creative economy are currently in the informal sector. Thus, the rise in the indicator does not mean the situation is good.

Another Itaú Cultural initiative is the "Cultural Habits Survey", conducted in partnership with Datafolha to investigate the cultural habits of Brazilians. In its third edition, the study found that contact with the arts decreases the number of fights at home and reduces stress and depression. The survey also discovered that the habit of going to the cinema to watch Brazilian movies is more common among classes A and B. Audiovisual consumption for Class C is more restricted to television and the internet.

Based on the experiences reported, it is possible to highlight several issues with the production and analysis of data about the audiovisual sector. One is the difficulty in visualizing and interpreting the data since not many have the training to do so. Not everyone

knows how to read graphs, indicators, and tables. These matters are well present in the cultural sector, which encompasses people who are not necessarily skilled in quantitative or statistical data analysis. For this reason, it is vital to rethink the way of presenting information, using a narrative that enables broader understanding. The use of different types of language reaches several audiences, such as young people from the periphery, the decision-maker of a private company, and a public manager.

Another challenge is transforming raw data into actionable information with the development of methodologies that produce, process, and analyze more meaningful data, representative of different population segments so that people recognize themselves in them. The concepts and procedures of the research methodologies need to account for the specificities of the places. Their development must come from an inside look. This is crucial because today the cultural sector uses "third-party" data from other areas. So, it is paramount to make a careful assessment when adapting methodologies coming from outside because the Brazilian reality does not allow a direct transposition of methods from abroad.

---

The panellists pointed out the challenge of asking the right questions in the research and the existing data analysis. How to ask good questions about the volume of information we have? Or how to convert data into information? Faced with difficulties in formulating research problems and drafting questions, the Itaú Cultural data panel enlisted the help of specialists to make some excerpts and ask questions that could guide the analysis. According to the panel, literature and training are weak, and so are data visualization and interpretation skills.

Finally, another issue is data ownership and privacy. We currently live in a surveillance regime where we produce data about ourselves all the time for large corporations. Large databases create a regime of suppression of rights through the concentration of capital, surveillance, and racism in the algorithms.

---

## Itaú Cultural

---

Initiatives related to data production:

---

Enciclopédia de Arte e Cultura Brasileira (Encyclopedia of Brazilian Art and Culture), the largest of its kind.

---

Physical and online presence.

---

Escola Itaú Cultural (Itaú Cultural School), an open school, free of charge, and with different types of self-training courses.

---

Partnership with three universities.

---

Projeto Rumos (Directions Project), which mediates cultural projects.

---

Itaú Cultural Observatory data panel.

---

Ancestralities Platform, created in partnership with the Tide Setubal Foundation, to gather and disseminate content derived from investigative processes, seeking to highlight the creations of different Brazils based on knowledge, histories and cultures of the black population and native peoples. Thematic axes: Art and Culture; Democracy and Human Rights; Science and Technology.

---

---

## Instituto Brasileiro de Geografia e Estatística (IBGE)

---

Information System and Cultural Indicators.

---

IBGE automatic recovery system (SIDRA) - Table containing data from local units, including audiovisual, with a 4-digit CNAE and including municipalities.

---

Municipal Basic Information Survey - MUNIC 2018, with a section on culture.

---

---

## data\_labe

Data and narratives laboratory in the favela of Maré, Rio de Janeiro

---

The laboratory was founded in 2016 on the premises of the Favelas Observatory, in partnership with the Data School. In 2018, it became an autonomous, non-profit association.

---

It has three lines of action: journalism, training and monitoring, and citizen data generation.

---

Young residents of under privileged regions produce new narratives through data.

---



10/5/22

## Panel 2

# Attracting international productions and investments

### Panellists

Steve Solut (Olsberg SPI) - mediator, Andressa Pappas (Motion Picture Association - MPA), Cibele Galvão (Electrica Cinema e Vídeo), Edison Viana (Moonshot Pictures) and Gustavo Mello (Boutique Filmes)

5 Olsberg SPI is an international creative industries consulting firm that provides specialized and strategic advice to the public and private sectors.

6 In the publication “Mapping of entities representing the audiovisual sector in Brazil”, these terms were defined as: above the line - talents or abilities related to artistic positions in the creative development of production, mainly direction, performance and script; below the line - talents or skills related to technical positions responsible for daily pre-production, production and post-production tasks, which includes numerous positions related to sound, makeup, art direction, animation, post-production and construction, among others (Olavarría) et al., 2021).

To discuss how global agents operate in the audiovisual sector, the panel presented an overview of the methodology and types of studies carried out by Olsberg SPI<sup>5</sup> around the world, focusing on technical consultancy for the public sector. Some studies exemplified the company’s performance, like a recent one with Netflix. Its purpose was to understand what is lacking in Brazil in the qualification of the *below-the-line* crew, who work on the production set, and *above-the-line*, who hold artistic positions related to the creative development of production<sup>6</sup>. The panel also mentioned a recent demand from Spcine: a map of the production capacity and technical labour in the city of São Paulo and five other municipalities. In Olsberg’s view, four main pillars are the basis for the audiovisual industry, and the studies developed by the company seek to follow and understand its dynamics. They are: **(a)** incentives; **(b)** infrastructure (studios and technical labour); **(c)** training; and **(d)** ‘film friendly’ environment.

The panellists discussed some organisations’ contributions in attracting international production and investments. These experiences, shared at the Forum, were explained in a brief introduction to each one of them:

Motion Picture Association of Brazil. On a global level, the MPA represents the major producers and distributors of audiovisual content for all windows: theatrical, *streaming* platforms, broadcast TV and pay TV. Netflix, Disney, Universal Paramount, Sony, and Warner Bros are members. The association’s role and mission in Brazil are to work with the entire sector, the community, the private sector, and especially the public sector.

Moonshot Pictures. The company has been active for over 30 years in the creation, development, and production of audiovisual content for cinema and TV.

Boutique Filmes. The production company has existed for ten years and, during this period, went through several audiovisual production cycles in Brazil, which have been thought-provoking and improved the business model.

Electrica Cinema & Vídeo. The company plays an important role in some of the critical phases of the audiovisual production process — infrastructure, production and training. It seeks to support technicians and all people who have faced difficulties with the technical quality of the productions.

---

The following were the questions asked to each panellist to guide the debate: What is the opinion about the Brazilian market, and how does this relate to international and Brazilian investment agendas? How can bodies like Spcine make a difference in solving structural challenges in the sector? How does the *Cash Rebates* program in the city of São Paulo facilitate agreements for new businesses in the international market? What are the main challenges to meeting the growing demand for infrastructure and equipment in Brazil during this current *boom* that the country is experiencing? The following topics summarize the panellists' answers.

---

**Topic 1**  
**Attractive factors and barriers**  
**in the Brazilian market**

---

“... how do MPA members see the Brazilian market and how that relates to their agendas for investment abroad and in Brazil?”

Brazil is a good place to invest for several reasons. The country has beautiful landscapes, and Brazilians are considered talented and creative. But there is still a lack of qualification and training among technicians in the audiovisual sector, which is in constant technological evolution, particularly in the *below-the-line* crews, which are essential to the audiovisual industry. Beyond the sociocultural perspective and despite the effects of the pandemic, the perception is that Brazil is a promising country with an attractive economic scenario and a great capacity for expansion.

It is a country that consumes a lot of audiovisual media because there is a high number of people with internet access, with daily consumption of almost seven hours. Today in Brazil, around 150 million people access the internet, approximately 80% of the Brazilian population. They usually access the internet on their cell phones, high-tech or not. There are about 100 million cell phones in Brazil. For this reason, it is urgent to invest in digital technology and the production and distribution of audiovisual content.

The pandemic accelerated a series of processes in the digital area as people stayed at home. After all, nothing is better than watching a movie or a series to forget about the situation and maintain good mental health. Thus, the pandemic accelerated all these digitally oriented business models. But the other windows, such as pay TV, broadcast TV, and theatrical, are just as important. This accelerated demand due to the pandemic is precisely why local content production is growing exponentially worldwide, not just in Brazil, like never.

So, Brazil has a great potential to attract international investments, not only of financial nature but also of institutional recognition, including more investments from the public sector. When this occurs, international investors feel increasingly compelled to invest. Consequently, there is job generation, greater demand for infrastructure, equipment imports, creative growth and development of projects and encouragement to production and commercial distribution, locally or internationally, of Brazilian content. That generates a virtuous cycle of investment and qualification.

The panel also brought up that incentive and regulation are not opposing concepts but complementary activities that, if well balanced, can be of great help in the development of the Brazilian audiovisual sector. Incentives, for example, must come from the public sector through *Cash Rebates* or other forms of stimulus. This initial push encourages the private sector to invest. But it turns out that the institutional and political discourse and will towards incentives get overshadowed by the focus on the regulatory perspective - what must be regulated, how the regulation should be, what the boundaries of this regulation are, etc. In other words, regulations dominate the discussion, which does not guarantee that the industry will be sustainable over time and grow.

---

**Topic 2**  
**Challenges related to human resources**  
**and how Spcine could contribute**

---

“...in which aspects are bodies like Spcine able to make a difference in solving the structural challenges of the sector?”

The advent of pay TV generated a significant increase in the volume of audiovisual production and the demand for products based on a regulatory policy, the quotas for domestic content on pay TV, which resulted in dozens of hours of screening independent productions per year for thousands of people. At that time, the same challenges existed as now - labour shortages and infrastructure.

Today the context of regulation *versus* incentive is different. Ten years ago, regulation was at the basis of the incentive model. Now there is an incentive that is not public and has no regulation. However, in both cases, the problems are the same: the scarcity of labour and the lack of infrastructure. The priority of companies is the fulfilment of their contracts. Their focus is to keep the workers in the sector to avoid losing them and suffering from a shortage of workers. Spcine could contribute to lessening that problem by offering the mapping of professionals in all areas and creating a database that would be fundamental to help in the continuity of the audiovisual economy.

In addition to fostering policies such as the *Cash Rebate* program, which shows the value of audiovisual production to the Brazilian population and abroad, involving legal entities and stimulating consumption, Spcine should also promote the potential of professionals in the audiovisual sector, especially *below-the-line* technicians, who are highly neglected.

Another deficiency that hinders the insertion of the city of São Paulo in the international audiovisual business environment is the lack of executive training. São Paulo does not have many qualified people to bring dynamism to the sector from a financial point of view. Moreover, initiatives to qualify and promote the entry of new entrepreneurs, who can participate in all links of the production chain, are lacking. To fill that gap, Spcine would have to create a training program including this specific link in the chain, in charge of doing business and bringing in money.

### Topic 3

#### Impact of policies such as *Cash Rebate* for the consolidation of international businesses

“...how does the *Cash Rebate* program in the city of São Paulo facilitate the closing of new deals in the international market?”

To contextualize the role of a policy such as *Cash Rebate*, the panel highlighted that the audiovisual industry involves business, *facilities*, and *physical production*. But, above all, it is an industry of emotions, connecting with human beings through mass entertainment. It is necessary to be an industry capable of creating successful products to attract international investment.

According to the panellists, the *Cash Rebate* initiative was considered positive and able to help international producers decide to invest in Brazil. Regardless of the specific importance of the mechanism, the most fundamental thing is to know that it will be available every year, over time, because the certainty of its existence enhances the attraction of more international investments.

Considering these characteristics of the audiovisual sector, it is crucial that, in addition to government encouragement, there are several business models, which are key to the perception that the industry is healthy. It is necessary to have independent producers in good financial conditions who can provide

security for private investment. An example of success is the series “3%”, produced by Boutique Filmes: it is one of the most-watched Netflix titles in the world, adding value to the platform.

This discussion about models is essential because of the audiovisual production cycle. There is a very long period between investment and return; for example, a series or soap opera’s development requires three to four years. It is an extensive process, bringing the return on investments much later. Commissioners and executives, such as international or local *players*, are interested in measuring the results of the high investments made in the original series.

*Streaming* opened a market, but it brought a competitive scenario and parameters of comparison and assessment of another magnitude, both artistically and financially. We need to increase investments to improve competitiveness because we are competing on an equal footing with international series. Furthermore, artistic ambitions, production values, returns, and distribution are not just local; they are the same all over the world.

In the case of the *Cash Rebate* program, more than attracting international investment, it helps independent producers to have money in their hands to take on larger-scale productions. Having money allows you to diversify business models and have operational and financial capacity at negotiations in Brazil or abroad. The *Cash Rebate* program raises the possibility of having money but in a new context, with a better dialogue with the private market. It is not something apart, as the productions developed through incentives were at times. It is a modern mechanism that organically joins the current business model without conflict and helps diversification.

Finally, the panel emphasized the importance of two factors that permeate the discussion of various public policies: continuity and predictability. Spcine should be concerned with the continuity of the programs and predictability - the sooner the information is available, the more egalitarian the program, and the more time interested parties have to seek partnerships and do business, especially in an international environment.

---

**Topic 4**  
**Challenges involving supply**  
**of infrastructure and equipment**

---

“ ...what are the main challenges to meet the growing demand for infrastructure and equipment in Brazil during this current *boom* that the country

Brazil faces many challenges in meeting the growing demand for infrastructure and equipment. The first factor is the exchange rate. Since it is necessary to import the equipment, all the purchases are in dollars, which can become a problem in the face of the devaluation of the national currency and exchange rate fluctuations. There is also the issue of taxes imposed on import operations, which may double the purchase price of imported equipment.

The second factor is the digitalization, requiring training and technical updating for the workforce. There are two challenges to highlight in the skill development of the workforce: first, requalifying professionals who already work in the area and have experience but need to be up to date with new technologies; second, including the youngest, who are more interested in technology, but require specific technical training to work in the audiovisual sector. With the increased demand, it was necessary to create technical courses and training so these workers could use new technologies. Private companies filled the gap, implementing “on-the-job” training for their collaborators, who learned more from practice than in theory. However, this internal qualification path cannot meet a broader demand since companies are not technical centres for the training and qualification of professionals. It is possible that producers focused on advertising, who have a greater and more diverse demand, need to offer training more programmatically.

The increase in demand and the possibility of attracting foreign investments raise concerns about the sector’s structure to respond adequately in terms of human resources. There is an urgent need to establish permanent qualification programs that combine theory and practice, that is, technical qualification associated with the experience of a set, which is essential for a professional. It is also necessary to provide opportunities for these activities to become perennial rather than seasonal.

---

Another theme discussed at the panel was video games, a dynamic sector with synergy with audiovisual production. Intellectual property is a case of this synergy. Netflix's expansion strategy includes the investment in an electronic games division. Several developers are moving from the audiovisual industry to the game industry precisely because the latter is more dynamic, with less regulation and provides a greater financial return. In this case, Brazilian developers are choosing to work for foreign contractors, resulting in the evasion of professionals.

This panel's audience was curious about the possible image gains for the city of São Paulo from the audiovisual production. The audiovisual sector is already positively impacting the image of the city of São Paulo abroad, as in the case of the series "3%", in addition to several other original productions that were effective in disseminating Brazilian cultural values. The production also broke a paradigm that global audiences don't consume series spoken in Portuguese. Ideally, there would be a nationwide program to promote the country's image abroad and not just programs at the municipal or state level. In any case, the city of São Paulo already fulfils its role well, as it has diverse cultures and identities.

11/05/22

#### Panellists

Karen Castanho (Founding partner of Biónica Filmes) - mediator, Aline Oliveira Cordeiro da Silva (Superintendent of Funcultura de Pernambuco), Bárbara Oliveira (Creative Economy Manager at the National Bank for Economic and Social Development - BNDES), Débora Ivanov (Audiovisual Producer and Secretary Director of the Union of the Audiovisual Industry of the State of São Paulo) e Léo Edde (Producer, Director and Founding Partner of Urca Filmes)

## Panel 3

# Incentives and investing in economic development

The panel discussed issues and challenges related to incentives and investments for the economic development of the audiovisual sector at an exciting and promising moment in the sector's history. There are high investments in local production from *streaming* platforms all over the world and in Brazil, with tremendous growth. The country has also restored the institutional security of the National Cinema Agency (Ancine), strengthened after several years of turmoil and institutional emptiness. In October 2021, it announced the resumption of the Audiovisual Sector Fund, allocating over R\$ 1 billion to production, distribution, infrastructure, and training lines. The public incentives at the federal level are crucial, as all changes in this sphere impact states and municipalities since many works are composed of multiple financing. So, one affects the other.

With the resources of the Audiovisual Sector Fund, the tendency is even higher growth in production in the coming years, so training more people is paramount. The truth is that there was no prior preparation for this volume and these new forms of production. There is a shortage of technicians in almost every area and every department. So, more professionals should be available as soon as possible. Most professionals learn on the set. Since there are no specific didactics in this experience, they may get lost. They are skilled professionals and know how to do their jobs but might get confused in labour relations, for instance.

Many technicians are isolated on set, playing their part without performing other activities. A more integrative view is necessary.

It is critical to invest in skill development to introduce new creative technicians in the market, focused on training and knowledge, especially in personal and professional relations, for this industry to grow sustainably. The courses available in the country are quite detached from market needs. It is essential to carry out other actions to train new professionals and upskill those already in the market. Training, therefore, is the greatest challenge in Brazilian audiovisual production, not least because there has been uncertainty in the resource allocation in the field for a long time.



---

Regarding the changes at Ancine, the panel highlighted the simplification and revision of processes, including the unification of the rules of the seven funding strands built over the last thirty years, at various times and with different rules. There are also changes related to budget execution and accountability, bringing security to state, federal and municipal entities, civil servants, producers, distributors, etc.

The second axis of the sector's future is associated with rights. Today, the various tax incentives in the country restrict the producers' ability to make their products profitable. Under current rules, several beneficiaries, such as large companies that invest through tax incentives, have the highest share in revenue participation rights. So, how can we think about sustainability and progress if so few of these future rights are available? Meanwhile, the *streaming* market is the fastest growing in the world, with Brazil among the five highest consumers. For some platforms, Brazil is the second largest consumer market. Another major challenge is the regulation of VoD, or "video on demand", whose main feature is to enable users to consume audiovisual content at the time, place and on the device of their choice, breaking up

with the concept of linearity of the programming that characterized previous media services. It is critical to advance the regulation of VoD to guarantee the rights of domestic producers, national entrepreneurs, and independent producers.

The whole world experienced the impact caused by TV shows, pushing the migration from broadcast TV to *streaming*. Therefore, it is necessary to create infrastructure with studios, transportation, environment, equipment, rental, and labour, always with regulatory mechanisms for this purpose. Everything is part of the necessary infrastructure for economic development.

Another challenge pointed out by the panellists was the necessary continuity of investments and incentives in the audiovisual sector. The existence of legal frameworks helps a lot from the perspective of a state policy, which supports this continuity. Concerning investment security, some type of legal and institutional certainty is necessary.

In Brazil, credit is very expensive and audiovisual productions have a very long production cycle. The interest rates to get a loan for making and releasing a movie may be prohibitive. However, in a more general context, production comes with investments in locations, jobs, structure, and logistics, which helps development. Around 70% of budgets are channelled to other segments of the economy, not exclusively the audiovisual sector. Film production is different from conventional industries: in these, it is necessary to build a reserved space, and there's waste; in short, several things in the surrounding environment prevent coexistence with citizens. In the audiovisual sector, the opposite is true. The American studios are proof and make a fortune with tourism alone.

Another topic to highlight is that audiovisual media helps economic development by being an instrument of *soft power*. For this to happen, mechanisms such as the *Cash Rebate* program, recently signed by the São Paulo city government, are vital.

Next, the forum presented experiences and mechanisms for promoting the audiovisual sector carried out in partnership with the Audiovisual Sector Fund.

---

## Funcultura of Pernambuco

---

Organisation managed by the foundation that takes care of the historical and artistic heritage of Pernambuco, together with the Secretariat of Culture.

---

The fund consists of tax and ICMS (Imposto sobre a Circulação de Mercadorias e Serviços [tax on the circulation of merchandise and services]) waivers. The decree regulating the law that established Funcultura lists the types of companies, and which economic segment can use Funcultura through the CNAE code. Currently, the segment that invests the most are energy companies.

---

Funcultura's current budget is R\$ 32 million for all cultural segments. The budget for the audiovisual sector is R\$ 9.3 million.

---

In 2007, a movement began to emerge in Pernambuco that came to be known as "Cinema Pernambucano", with feature films, television products, research, preservation, training, film clubs and *games*.

---

---

At Funcultura, the spending ceiling per film for feature films is R\$ 17,000. For this reason, projects generally seek other sources of incentives. The starting point is Funcultura, which acts as a referral letter so producers can pursue other incentives and resources.

---

"Bacurau" is an example of a Funcultura movie that was successful with audiences and critics. The film overcame the difficulty of Pernambuco productions to be placed in commercial theatres, going to commercial theatres, streaming platforms and broadcast TV and winning international awards.

---

Partnership with the Audiovisual Sector Fund, since 2014. In the last ten years, the audiovisual sector in Pernambuco received investments of R\$ 162 million; of these, R\$ 113 million came from Funcultura and R\$ 48 million through the FSA. This helped make several productions possible. This continuity in the availability of resources helps to protect the region's audiovisual production, giving the impression of a state policy, not of an administration's.

---

---

### Banco Nacional de Desenvolvimento Econômico e Social (BNDES)

---

The organisation created a program specifically aimed at the cultural sector: the Procult (Culture Sector Development Program).

---

Financial engineering was necessary to create a credit line for the cultural segment, reducing the minimum amount from R\$ 10 million to R\$ 1 million and making guarantees and risk classification of companies more flexible so that they could have access to these resources. It was also required to make a mix of *funding* to dilute the costs.

---

---

The diagnosis is that movie theatres were very concentrated in large cities, so it was crucial to have a line of credit with a lower minimum to attend to this demand. BNDES created a mix of resources, with the bank associated with a larger share of resources from the Audiovisual Sector Fund. Thus, it was possible to create a different type of guarantee for movie theatres, namely box office receivables and concession stands.

---

Procult also wanted to encourage the formation of a creative nucleus within the production companies to finance the hiring of people focused on thinking about projects at different stages of maturity. Thus, while one is filming, the other is in development. It is possible to have a portfolio of projects instead of one-off projects, which require the demobilization of labour until funding is secured.

---

11/05/22

#### Panellists

Fernanda Lomba (President of Instituto Nicho 54 and Partner and Executive Producer at MUNDI) - mediator, Renata Almeida (São Paulo International Film Festival), Rodrigo Antônio (International Black Audiovisual Festival of Brazil - FIANb and Association of Black Audiovisual Professionals - APAN), Well Amorim (Maloka Filmes) and Zita Carvalhosa (Curta Kinoscópio)

## Panel 4

# Audiovisual events and the challenges of promoting diversity

The panel discussed challenges related to the promotion of diversity in the audiovisual sector, addressed based on representative experiences in the area, such as the São Paulo International Film Festival, the São Paulo International Short Film Festival - Curta Kinoforum, the Association of Black Audiovisual Professionals and the Perifericu Festival - Cinema and Culture Festival from the Hood.

The subject of diversity, which has undergone many transformations in recent decades, was addressed from several points of view: the variety at the origin of the productions (hosting works from various countries); of issues of gender and race; of an ecosystem of narratives and stories focusing on social impact; and on the issue of accessibility. Online access enhanced by the pandemic contributed to the

increase and diversification of the audience through the regionalization of the city of São Paulo and Brazil. Diversity is addressed from the point of view of the public profile since it is noticeable the higher presence of black and brown people or people with physical or visual disabilities.

The change in audience was possible due **to four factors:** **(a)** access to production technologies and narrative construction; **(b)** the occupation of spaces of visibility; **(c)** the discourse of representation; and **(d)** the discourse of interaction and consumption based on the possibility of guiding what is consumed. The market took a long time and is still trying to deal in a specific way to understand black audiences and audiences from the periphery as consumers.

Another perspective mentioned is the emergence of events with a specific focus, which may contribute to diversity in the sector. In the last ten years, Brazil has changed a lot, and the audiovisual sector is still building the reflection of this change. For this reason, sharing the proposals for event organization is critical. Festivals with a specific focus must always exist, as it makes people want to meet their peers. Within this context, seeking cooperation initiatives between events and people in effective information exchange processes is essential. And, encompassing all of this, it's essential to plan since it indicates paths of thought, programs, and financial and economic issues that can optimize this entire process.

---

Today we started talking about coexistence. We are debating about a process of insertion and permanence in the audiovisual market, a market that does not include everyone and the plurality of narratives, and this permeates the curatorial view. The time has come to have these coexistences within festivals, something that for a long time was not accessible to the most peripheral public. This coexistence of paradigms is an enormous challenge in Brazil.

Affirmative action is considered crucial in audiovisual initiatives, including in the selection committees and the Spcine staff, which is already happening. These affirmative actions must consider the number of directors contemplated and the number of financial resources allocated to their projects, considering economic, territorial, ethnic-racial and gender identity criteria. The presence of LGBTQIA+ and peripheral filmmakers is essential because they must be able to win competitions and exchange cinematographic production experiences with other peripheral areas.

The funding for art is another major challenge for everyone, even more, when it comes to new initiatives emerging in the suburbs. The Municipal Culture Plan needs to claim the understanding that there is a diversity of economies within the audiovisual sector, in addition to the market that does not include the peripheral audiovisual. Profit must not be the only objective of the peripheral audiovisual work. The cultural and economic ecosystem in the periphery can benefit from the realization of events, the creation of tax exemption initiatives for audiovisual producers, and the recognition of film clubs, screenings in small football fields, etc., as part of a wider audiovisual distribution circuit. These actions will help dismantle the unique narrative of audiovisual distribution. It is essential to understand audiovisual as a right; therefore, we should not normalize the separation between big and small productions.

---

### Mostra Internacional de Cinema de São Paulo

The Mostra Internacional de Cinema de São Paulo (São Paulo International Film Festival), which celebrated its 46th anniversary in 2022, always aimed at diversity, starting with the fact that it does not focus on *mainstream* cinema. It has always presented films from countries such as Kazakhstan, Mongolia, Nigeria, and Iran, with important stories to tell.

In its 10th edition, in 1985, Mostra screened a film with a trans character, long before the creation of the acronyms LGBTQIA+.

There are also more operational demands concerning diversity, such as a request from the State Public Prosecutor's Office regarding accessibility, namely, that the 46<sup>th</sup> Mostra should have at least two films with audio descriptions. It will take time to have all 250 movies presented by the Mostra with audio descriptions since not all come with this feature. In this sense, adaptation is also part of the process.

---

---

### Festival Internacional de Curtas de São Paulo Curta Kinoforum

The Kinoforum Cultural Association was created in 1995 to carry out activities and projects that support the Brazilian audiovisual industry and promote citizen education actions focusing on cultural and social inclusion.

When the Festival Internacional de Curtas de São Paulo Curta Kinoforum (São Paulo International Short Films Festival Curta Kinoforum) began, it was possible to screen all sixty or seventy films that applied. Today the festival chooses from around 2,000 films, a direct result of the technological advances in audiovisual production.

The big challenge today is to choose sixty movies from a universe of about 2,000. What selection criteria should be adopted?

The online access fueled by the pandemic further helped promote the films with the online version of the festival. The association then discovered an interest from people from all over Brazil, in the various regions, with a significant increase in audience.

---

The association identified a thirst for regionalization, be it in the city or Brazil. Brazil changed, people changed, accesses changed, and desires changed.

It also detected an increase in people's interest in working in the area. Various locations could host workshops, especially on the periphery of São Paulo.

Another transformative factor over time was the profile of the audience attending the festival in person: from a white audience to a growing presence of black people and brown people, in addition to people with visual and physical disabilities. The festival is understood as a meeting place, welcoming of different profiles.

---

---

### **Associação dos Profissionais do Audiovisual Negro (APAN)**

---

The Associação dos Profissionais do Audiovisual Negro (APAN) [Association of Black Audiovisual Professionals] is an institution for the incentive, appreciation and dissemination of audiovisual production involving black people, as well as the promotion of these professionals to the audiovisual market.

---

The institution is the result of dialogue, connection, and strengthening of filmmakers and black Brazilian audiovisual professionals to create spaces that previously did not exist for this audience. Its mission is to value and promote the Brazilian black audiovisual industry based on three fundamental lines of action: dissemination, training, and market debate.

---

---

The association created the “Festival Internacional do Audiovisual Negro do Brasil - FIANB (Brazilian International Black Audiovisual Festival - FIANB)” to empower black cinema, thinking about it more comprehensively. The festival focuses on decentralizing the thought and making of contemporary Brazilian black cinema, with strategies for insertion and permanence in spaces of creation and power. At the festival, there are specific sections to talk about narratives and different forms of production, with debates on regionality and gender.

---

The task has been to bring together black producers from all over Brazil. To date, APAN has selected twenty people to continue with focused work, including the participation of Afro-Colombian producers.

---

They also begin to talk about business plans with the 800 associates, how to enter this market, understand how to make black movies, and compensate for educational gaps among associates, in addition to verifying inequalities in access, debate, and understanding of active public policies. The intention is to maintain the debate with all Latin America.

---

---

## **Festival Perifericu - Festival de Cinema e Cultura de Quebrada**

---

Perifericu (Perifericu Festival - Film and Cultural Festival of the Hood) was created in 2015 as a community film festival, whose beginning dates to the creation of a movie club at the Casa de Cultura do M'Boi Mirim, in the southern part of the city of São Paulo. The intention was to give space to producers from other regions to screen their productions since they are films that have no place either in conventional theatres or at festivals.

---

The Periphery Trans Festival, which took place in Grajaú, was one of the inspirations of Perifericu. Screening the films in the M'Boi Mirim space and the Perifericu is a way of emphasizing the relevance of the works. It also creates a safe and welcoming space for the participating public.

---

---

The pandemic deeply impacted access to movies. How to organize virtually a community festival whose central point is the territory? The virtual space is not a territory in which the community is. Going to the movies frequently is expensive and often not affordable for families in the periphery. It would have to be accessible to people from the periphery, and that they could also envision themselves as filmmakers.

---

An integral feature of the Perifericu Festival is the combination of other forms of art with cinema. As the population are not used to accessing movies, the festival integrates poetry and maracatu, among other forms of expression.

---

Audience development is a challenge because the inclusion of more people must be constant. Research conducted within the festival found that 20% of the participants were going for the first time, which reveals a significant renewal of the public.

---



#### Panellists

Kiko Mollica (Km 70) - mediator, Adhemar de Oliveira (Programmer of the Itaú Cinema Space), Carol Misorelli (Taturana), Fábio Lima (Digital Sofa) and Licinio Januário (Wolo TV)

11/05/22

## Panel 5

# Audience development for the Brazilian audiovisual

The panel on audience development for the Brazilian audiovisual industry began with a reflection on how to make it possible for audiences to access cinema and be aware that this access is a citizen's right. Currently, there are about 2,300 movie theatres in Brazil and on the week in which the Spcine Forum took place, 2,200 of these theatres (almost 96%) were showing the movie "Doctor Strange". Without any objection to the film, this becomes a problem of people's right to information, diversity, and free choice since the options are limited.

A colonial and Euro-American context shaped the history of cinema, but today the reality of cinema goes far beyond that. For this reason, developing audiences also means working on diversity, both in programming and in encouraging people to produce movies.

It is of great importance that this diversity is expressed in a country such as Brazil when we consider the diversities that constitute the richness of Brazilian culture. Diversity of race, sexual orientation and all others are essential to deepening the understanding of life based on the experience that cinema provides to everyone.

To talk about audience formation is to defend Brazilian cinema. Only 12% of municipalities have movie clubs, even with all the existing technological facilities. Regarding cinema, 19% of Brazilians have never been to the movies to watch a Brazilian film. Broadcast TV is still the most accessible way to watch Brazilian movies; however, only 5% of the films aired in this medium in 2021 are of national origin. It is necessary to boost the production of films for kids to encourage Brazilians to watch more Brazilian films. That way, children will grow up watching Brazilian movies, developing a taste for them at a young age.

Audience development must happen in a continuous and diversified manner, encompassing audiences of several ages in various places. Nowadays, this development can be carried out through audiovisual education in schools because access is easy. This development must also include a critical view of what students see and consume. Precisely for this reason, and in times of *fake news*, this critical perspective should be mandatory in elementary school. One strategy could be to engage and mobilize specific audiences to discuss films.

---

Movie clubs and alternative spaces have successfully held initiatives to mobilize and create networks to watch movies and hold conversations based on movie screenings. However, these networks are created and dissolve very quickly. Therefore, creating and thinking about public policies for this exhibiting structure involves understanding the nature of these spaces and relating to the dynamism of this field. Organisations, producers, and distributors can help with this process. Circulation in spaces beyond commercial theatres is another discussion that should happen but rarely does. There is hardly a thought, a pre-reflection, or an in-depth analysis of the circulation of the work.

Large platforms can help to disseminate commercial and alternative Brazilian content, and the competition between them can help achieve greater diversity. Concerning access, it is always the same twenty million Brazilians who pay for content, be it the cinema, pay TV, the old video stores or the current *streaming services*. The remaining 200 million watch only free content.

Regarding the exhibition methods, long are the days when movie theatres were the only option for the circulation and screening of audiovisual productions. Nowadays, there are several formats and platforms, and the competition will allow producers more flexibility in negotiating all the windows for the same movie.

Some see a cyclical movement in access to audiovisual production in Brazil, with advances and collapses in alternation. But the new technological era that is beginning helps to change this consumer mentality, allowing for greater autonomy in production and diffusion. However, a racist consumer mentality seems to exist, even among black people, with 14 million companies created by black people and no success stories. Breaking free of this mentality involves audiovisual production, with more black productions made in all regions, including out of the Rio-São Paulo axis.

The pandemic does not seem to have changed the audience profile. However, the demand for content was very high. In terms of conversion, of the capacity to attract subscribers or retain them, the audience would probably be the same watching the film at the movie theatre. People also were more comfortable watching national content at home; that has already become a trend.

Finally, the panel urged the formulation and structuring of public policies that, in the case of audience circulation and development, allow the creation of other models guided by social changes and address structural issues posed. Other panels mentioned this about production but very little in terms of distribution. It is necessary to look at the diversity of the Brazilian production and pursue incentive models that include the circulation of all works of all types, not just some. It is urgent to strive for change, audience development, circulation, and racial and gender equity. And in this process, to consider independent exhibition spaces. For example, you can take advantage of the regulatory framework for exhibition in schools to create this audience.

---

### **Taturana - Social mobilization**

Taturana uses digital and social technology to democratize access to the cinema, mobilizing partners throughout Brazil and forming networks around audiovisual materials.

Taturana starts from a few principles, such as the existence of many collective groups, film clubs and meeting spaces to watch films and hold conversations based on film sessions. The work seeks to create and understand the film's circulation strategy and where it can cause the most social impact. From then on, circulation in these spaces happens.

---

#### Panellists

Priscila Machado (Instituto Criar) - mediator, Ariel Nobre (Trans Mercad ), Jana na Oliveira (RAIO), Taina Xavier (F rum Brasileiro de Ensino de Cinema e Audiovisual [Brazilian Cinema and Audiovisual Teaching Forum] - FORCINE), and Sonia Santana (President of the Sindicato dos Trabalhadores na Ind stria Cinematogr fica e do Audiovisual [Union of Workers in the Cinematographic and Audiovisual Industry] - SINDCINE)

12/05/22

## Panel 6

# Bridging the gap between professional training and the market with a focus on diversity

This panel discussed issues related to audiovisual education and the market, focusing on diversity, with reports from several experiences. The audiovisual market was not diverse for many years because it saw no need; however, it is currently facing this challenge. Today, diversity is profitable since it involves audience reach, crowded movie theatres, and *streaming* numbers; there are cases of inclusive productions that achieved significant numbers and values. But profit is not the only aim. Diversity is essential to a more just, egalitarian society. There is also regionality, especially those out of the Rio-S o Paulo axis, which creates methodologies to build a diverse audiovisual.

However, in all facets, there is still much progress to make. Even though today there is no more place for productions that are not diverse, there are still many cases of allegations of racism in the sets. Structural conditions in Brazil do not help; for example, the dropout rate among trans people is 82%.

Given this situation, the forum underlines the importance of continuing dialogue, fostering spaces of connection, and establishing policies and programs that encourage the qualification of diverse professionals in all departments of audiovisual production. It is necessary to have a fully qualified audiovisual sector with prepared contractors who respect collective agreements. All this is reflected in qualified professionals on the set with speed,

assertiveness, commitment and, above all, knowledge. This full qualification could help reverse a commonplace situation, which is the isolation of professionals when they speak up or say something, not in line with the expectations of a company. This results in 98% of the people on sets having experienced violence or harassment or observed such violence or harassment. Many difficulties remain in identifying and handling these types of violence and protecting people so that they receive dignified and respectful treatment. The quality of what's on the screen echoes that. The market also needs to understand the issue of equity within diversity.

---

The advertising market also reported problems like scripts for radio and television that are poorly prepared and tasks that don't fit into a 12-hour working day, causing the exploitation of the professionals involved and their *burnout*. That's why the advertising market receives criticism. It would need a more humane view of the sector and its professionals, respecting diversity by conviction and not the obligation to comply with a quota. The set must adhere strictly to all processes for work to be adequate.

Another topic was the issue of the transparency of public funding calls, with the dissemination of the data collected. It would be helpful to inform, after the deadline, the number of applications and the profiles of the projects registered and selected. Setting up the monitoring structure for these cases is another way of verifying the policies' effectiveness.

Another point discussed was that of academia. Knowledge is becoming more of a two-way street than a specific direction for academic knowledge, even more so because most *below-the-line* professionals do not have higher education in cinema and audiovisual. On the other hand, training in the area can offer instances of experimentation that are not possible in market practice. Hence the importance of the State in training professionals who are socially vulnerable and need support from public policies. The State must invest so that these people are able to actually be visible. Losing that investment is not a possibility. The State has already invested in that student through the Exame Nacional do Ensino Médio [National Secondary Education Examination] (ENEM), which makes it possible for them to enter university. Losing that student along the way means wasting public resources, and all public resources must return to society.

---

### Transmercado

---

Initiative to train trans people to entrepreneurship.

---

Advertising professionals, Afro-descendant CEOs and women who fight for greater diversity in Brazilian advertising supported the planning and execution of the initiative. The organisation conducted the learning journey day, where trans people learned how to invest and renegotiate their debts.

---

### RAIO Agency - Audiovisual Network of Orchestrated Inclusion

---

It is a company that recruits talent and searches for opportunities focusing on the diversity of race, gender, sexuality and regionality, incubated by the Brazilian Association of Black Audiovisual Professionals (APAN). RAIO was founded in 2020 to meet the growing demand for diversity in the Brazilian audiovisual industry. It is committed to creating methodologies to promote diversity and work on it.

---

RAIO is drafting an anti-racist manual with cases and methods to qualify teams to deal with diversity on set.

---

### Fórum Brasileiro de Ensino de Cinema e Audiovisual [Brazilian Forum for the Teaching of Cinema and Audiovisual Studies] (FORCINE)

---

FORCINE is a non-profit civil society that brings together and represents Brazilian institutions and professionals dedicated to film and audiovisual education.

---

The schools that make up the entity participated in a diversity mapping. This mapping showed a higher presence of white people in the courses. Of the 466 questionnaires answered at schools in all regions of Brazil, 61.2% were white people, 13.7% were black people, and 21.2% were brown people. There is also greater participation of cis women than of cis men and 6.9% of people with some disability. Regarding professional aspiration in the area, 68% pointed to directing, 58.2% to screenwriting, 42.1% to photography direction, 41.8% to art direction and 37.3% to editing, in addition to 34.5% interested in research. At the end of the mapping, there was a discussion about the creation of a guideline document regarding diversity.

---

---

**Sindicato dos Trabalhadores da Indústria Cinematográfica e do Audiovisual [Union of Workers in the Film and Audiovisual Industry] (SINDCINE)**

---

SINDCINE operates in the states of São Paulo, Rio Grande do Sul, Mato Grosso, Mato Grosso do Sul, Goiás, Tocantins and Federal District.

---

The union's role is to bring together professionals from the audiovisual sector, qualify them and regulate them, providing conditions for entering the market. The institution welcomes all educated and qualified diversity. The priority is the regulation of the DRT and reconciliation with the sector, thus trying to change the image of unions as "enemies". SINDCINE created the position of the beginner technician, an intern specific to the cinema sector. To receive a full DRT, three years of training are necessary. There are guidelines in lectures with discussions about harassment, the hierarchy on set, respect, availability, and commitment at work.

---

#### Panellists

Simone Kliass (Founder and Vice-President of XRBR) - mediator, Érika Caramello (CEO Dyxel Gaming), Jorge Groove (VR games creator), Rodrigo Terra (Abragames) and Silvana Bahia (Olabi)

12/05/22

## Panel 7

# The new audiovisual frontier - Games and XR

The panel on games and XR at the 1<sup>st</sup> Spcine Forum highlighted that these areas are an integral and crucial part of the audiovisual sector. A sign that the rapid transformations in the methods of production and consumption of audiovisual culture raise questions about synergies, points in common and peculiarities of each medium.

XR (*extended reality*) encompasses virtual, augmented, and mixed reality. Augmented reality applies to digital elements in our reality. Meanwhile, virtual reality relates to the user's immersion in a fully digital world using glasses, apart from the real world. It is a huge market that still has growth potential. According to the consulting firm PWC, virtual and augmented realities could be a US\$ 1.5 trillion market by 2030. A Game Brazil survey released in April 2022 revealed that three out of four Brazilians are used to playing, an increase of 2.5 percentage points compared to the results obtained in 2021. In addition to its intrinsic potential, the area has attracted

the attention of other segments and brands. Forbes magazine published that 75% of the world's most valuable brands have invested in some experience related to this universe, and the preferred device for players is the mobile phone. Despite the initial consideration of the segment's belonging to the audiovisual area, its complete immersion in the general context of the audiovisual industry will happen through explaining and sharing the concepts and assumptions of operation and creation. An example of this was the presentation of post-digital, which is not something that comes after digital but can only be understood based on the understanding that the world is composed of different layers of perception of reality. For this reason, we can understand our reality as the sum of the physical world and the infinite possibilities of simulations created with anything with connection and processing capacity. Based on this information, the concept can be accepted, interpreted, and operationalized by agents in the sector.

Olabi brought up some topics about the general dynamics of the audiovisual industry concerning diversity and inclusion, which, in a certain way, also occurs in the world of games and XR. Research conducted by the GEMA (Grupo de Estudos Multidisciplinares de Ação Afirmativa [Multidisciplinary Affirmative Action Studies Group]) reveals that, among the highest-grossing films in Brazil from 1995 to 2016, only 4% had black people in their casts. None of them had a black woman as a director or screenwriter. That's a gross underrepresentation considering black people make up more than half of Brazilians. More recent data shows that today, black people in the audiovisual sector represent 2.5% of directors and screenwriters, all men. The first step to change this scenario is to recognize the problem and seek knowledge and skills from the populations that need representation.



---

As in other audiovisual segments, the gaming and XR areas present two issues that slow the sector's development: the cost of equipment and the qualification of the workers. It is challenging to acquire equipment, especially by developers, because good machines are expensive. The other difficulty is the lack of qualified professionals. Developing policies that encourage and enable access to knowledge and equipment is essential to fill that gap. The Black Cinema Animation Center aspires to train and include people in the segment. The organisation's two main objectives are training black people to increase their income and helping them to be able to tell their own stories. There are no substantial differences between the animation market and the general audiovisual market in terms of positions since there are also animators, modellers, voice actors and screenwriters in both.

Training in such a dynamic area is complex. It is a sector with lots of experimentation and creativity because the best resources and professionals are not always available. At the same time, the area attracts people from various sectors who are migrating to games and XR, and these professionals bring diversified experiences. This combination of training diversity and rapid technological advances makes it difficult for academia to keep up with the need for training. Good training also involves cutting-edge equipment and the use of expensive software licenses. Due to this scenario, production in Brazil tends to be more peripheral, making it challenging to create trailblazing games, the so-called "Triple A". Promoting content innovation is paramount because the narratives tend to be homogeneous, with a Eurocentric influence. The openness to diverse narratives often comes from those unable to place themselves in traditional studios and end up creating their games and stories. The division between digital game courses and game design courses is harmful to the training and should not exist, according to a panellist.

Besides promoting innovation in content, inclusion policies can have a social impact, incorporating young people from the periphery. Part of this population feels disbelief towards public policies, institutions, and their future. This sentiment can change with programs related to the universe of games and XR - which tend to be attractive to young people - and aimed at this audience. The government must also understand that once these young people have the training, there will be wealth generation for the city and the country.

---

In terms of action and proposals, there is a recognition that Spcine already plays an essential role in the games industry, mainly with well-prepared funding public calls contemplating diversity. Funding public calls are considered a very effective incentive but insufficient, and their number has decreased recently. There is a perception that the gaming sector does not have many incentives, and a rich and dynamic city like São Paulo does not yet have a development hub in this area. One obstacle is high taxes, as games fall into the gambling category.

Another problem is that most companies in the segment are not yet formal, which makes it challenging to obtain the documents required to participate in a public bidding or funding public call. When facing these obstacles, good Brazilian developers end up being hired by the international market, which pays in hard currencies, making it difficult to retain talent in the country.

In contrast with these hardships, Preta Lab is a success story in promoting qualification and inclusion. In five years, the platform has worked on issues of gender and race intersexuality in technology. Preta Lab managed to meet the proposed objectives around three axes: **(a)** building a network with more than 600 women in Brazil working in different areas of technology; **(b)** maintenance of a channel open to all black women who are interested in the segment; and **(c)** consulting and building more inclusive processes within organizations, institutions and companies.

---

### **Olabi**

Created in 2014 as a space dedicated to learning technology in the city of Rio de Janeiro, Olabi operates in the areas of social innovation, technology, and creativity.

The non-profit organization aims to democratize technologies to transform society in the search for a fairer world.

---

---

### **PretaLab**

Project created in 2017 as a network of black women in technology. It works in educational training and diversity consulting for companies. It created a tool with profiles of black women in technology (a kind of talent bank).

---

12/05/22

## Panel 8

# The socioeconomic impacts of film commissions on cities

### Panellists

Mauro García (Brasil Audiovisual Independente - BRAVI) - mediator, Georgia Costa (Coração da Selva and Brasil Audiovisual Independente - BRAVI), Guillermo Saldaña (Mexico City Film Commission Mexico City), Luiz Gustavo de Oliveira (Ilhabela Film Commission) and Sol Mayoral (Buenos Aires Film Commission)

*Film commissions* are organisations, usually state or parastatal, dedicated to attracting and encouraging the production of audiovisual productions at their place of operation. In general, they aim to attract audiovisual productions and support the work of producers of all formats of audiovisual content during the filming phase, making an interface between producers and government and private bodies in the region. With representatives of *film commissions* from important Latin American cities, the 1<sup>st</sup> Spcine Forum discussed the challenges and the positive impacts of this type of organisation: **(a)** how a *film commission* collaborates in the development of the local audiovisual sector; **(b)** its role in attracting filming; **(c)** the difficulties in creating this type of organisation; and **(d)** the operational challenges of its functioning.

In the experience of “La Comisión de Filmaciones de la Ciudad de México”, the main points of success and contribution of the commission were: the existence of a consolidated legal framework that provides security for investors, both local and foreign; the capacity for coordination between various bodies and organisations; and the simplification of bureaucratic requirements (considering that production needs may vary according to circumstances or seasonalities, in the case of the post-pandemic period). A configuration that supplies these elements can contribute to the viability and organisation of a new project, providing conditions for the filming to happen in the best possible way. However, it is crucial to consider that the entity does not have the authority to review legal conditions, such as those of work. Here, once

again, comes the coordination and dialogue capacity of the commission, which can mediate conversations and negotiations with leaders, directors, and producers. For example, there is always an attempt to establish price parameters so that the prices aren't lower for being produced in Latin America; the goal is to ensure that professionals in the area receive fair wages and work under ideal conditions.

---

One of the inspirations for creating the “Ilhabela Film Commission” was an opportunity to insert local labour in the audiovisual sector. The wedding industry in the city (there were more than 90 weddings in the first months of 2022) means that many people have training. The main attraction of the island is its great scenic beauty. The local *film commission* intends to make the city as attractive to audiovisual productions as it is to weddings. The potential increase in this activity will require a labour training effort, which may represent an opportunity for the professional development of the local youth and community.

Because they serve a particular location, *film commissions* respond to specific contexts. Even considering their objective is always to promote audiovisual production through the exchange of experience, each one’s operations respond to specific cultures, regulatory environments, and different cost structures, even with two cities within the same country. Thus, it is helpful to return to the four-axis structure shown at the beginning of this panel to highlight the main contributions and suggestions collected during the debate.

---

### How the *film commission* contributes to the development of the local audiovisual sector

---

Acting broadly throughout the chain impacted by the attraction of productions. Acting constantly to demonstrate the benefits of audiovisual work for the various economic segments of the city, not just for the audiovisual sector.

Clearly showing the multiplier effect of investments in the audiovisual area. Conducting studies and using local comparative examples, like the automotive industry. In some places, the audiovisual sector would generate twenty times more jobs than the automotive industry with the same investment.

Publicizing the advantage that the audiovisual industry does not have the cost of setting up a factory or implementing fixed machinery at that location. Filming can take place on the streets. The attractiveness — and its highest value — is the city itself.

Demonstrating that the benefits expand beyond the audiovisual production chain, extending to other industries in the city, such as tourism. In addition to generating economic movement in the city, the production will promote the location “spontaneously” to a large audience.

Establishing a funding plan by production size. In Mexico City, the shooting of big productions like “007”, “Roma” and “Bad Boys 3” generates a 1.8 multiplier effect within the industry.

---

Integrating the *film commission* into the broader framework of the city’s creative economy, demonstrating that this can represent the possibility of diversifying the economy, generating income and employment through the training of talent, in addition to developing areas related to the audiovisual sector, such as technology.

---

---

## Role in attracting filming

---

Acting to enhance your geographical and geopolitical context. Due to its proximity to the United States, Mexico's top commercial partner, Mexico City benefited in the field of advertising, which used to be filmed a lot in Eastern Europe. With the war between Ukraine and Russia, most of these productions migrated to Mexico City.

---

Gathering and supplying data to facilitate decision-making and product planning. Besides a positive effect on producers, this kind of initiative shows the city the benefits of a *film commission*.

---

---

Mitigating and minimizing the possible risks and costs inherent to local production, making it easier for producers to establish the cost-benefit ratio in their decision. For example: there are specific costs involving production on an island, which is why the Ithabela Film Commission works to minimize its impacts, facilitating logistics to reach locations and access rental points. This can be cost-reducing, boosting the attractiveness of the municipality for an increasing number of productions.

---

Having a detailed picture of local resources that may be made available to producers. For filmmakers, working with local resources is always positive because transportation logistics are complicated and expensive. The more structure there is on-site, the greater the savings. A catalogue to facilitate the entire process (especially production), with all local suppliers, helps the management of filming. With this, it expects to provide as much support as possible for producers to operate in the municipality.

---

---

Demonstrating the capacity to accelerate the process that the *film commission* can put at the service of production. It is increasingly necessary to produce and create more quickly. Many production companies may have several simultaneous locations, with tight delivery times and delays that may impact the overall schedule of a project.

---

Promoting articulation and interaction between the public and private sectors. The action of the *film commission* improves public policies, causes a reaction from the private sector, and strengthens the local industry.

---

---

### Difficulties in creating this kind of organisation

---

Creation of an environment that generates political will. Today, the complexity of economic, social, and political processes makes it hard to include new topics on the agenda and deepen the discussion of public policies. Public officials need to be bold and not give in to difficulties, especially budgetary ones. It is vital to persist in articulating to put the political will into practice and take initiatives like a *film commission* despite the complications.

---

### Operational difficulties

---

Articulation between the various public and private agents participating in a production process. The anticipation of problems, the engagement of the sectors and bodies involved, the establishment or creation of common objectives, the dissemination of shared gains, and the implementation of conflict management are measures that can help the functioning of *film commissions*.

---

The need for a legal framework with clear laws guiding the performance of a *film commission*. Lack of clarity in legislation regarding the use of locations and economic incentives may also hamper production in some cases.

---

Issues inherent to the city itself for which clear action strategies are essential. The Mexico City *Film Commission* points out that the city is one of the greatest tribulations. Like São Paulo, it is a chaotic, problematic, and busy city and one of the most populous in Latin America. To deal with this, the Film Commission developed strategies to engage the communities in the locations, thus avoiding conflicts.

---

A high volume of bureaucracy and lack of agility. One of the objectives of the *film commissions* should be to address this type of problem. Often the biggest problem is agility and not volume. Some processes may require many forms and documents; faster response times by the responsible bodies would facilitate the process.

---

Excessive regulation. Operating in public places requires specific rules and conditions. But excessive regulation is considered toxic, especially in the creative industry, whose drive is ideas, and which has a different form of production. It is certainly not possible to avoid regulation, but it could be more fluid, simplifying and facilitating the response to the controlled and supervised activities.

---



12/05/22

## Panel 9

# “Glocal” progress: strategic dialogues for the consolidation of the development of the Brazilian audiovisual

### Panellists

Georgia Costa (Brasil Audiovisual Independente - BRAVI), Marianna Souza (Associação Brasileira da Produção de Obras Audiovisuais - APRO) and Rodrigo Antonio (Associação dos Profissionais do Audiovisual Negro - APAN and Festival Internacional do Audiovisual Negro do Brasil - FIANb)

7 “Glocal” is a concept related to the motto *Think global, act local*, formed by the combination of two words - “global” and “local”. The term refers to the interchange between global and local cultural values, generating a third value connected to what is happening globally and locally.

Considering a comparative perspective with an assessment of our capacity to adapt to a bigger market are vectors for discussing what “glocal” means for the development of the Brazilian audiovisual<sup>7</sup>. In a simpler sense, thinking globally, and acting locally, are sources of thought for producing and distributing works and services that need the coordination of large production chains. In practice, implementing this perspective faces the challenge of leading complex processes in locations with diverse cultural values. The need for a “glocal” vision and the challenge of implementing it, and dealing with cultural diversities, is present in the audiovisual industry.

Some audiovisual sectors have been dealing with these issues for a long time; for instance, the advertising market. The demand for this product has been standardized and globalized for some time, to the point where several countries use the same ads with a few adaptations. What may vary are the local conditions for producing it. Factors such as workforce training, management capacity, exchange rate etc., may interfere so certain countries and localities become more or less competitive in the supply of these works.

It is also necessary to consider the local dynamics of the operation of the segments and their markets. APRO gives an overview of what the pandemic meant for this sector: during the period, the producers who are members of the association saw a drop in revenue, from US\$ 42 million in 2019 to US\$ 27.5 million in 2020, partially recovering in 2021, reaching US\$ 32.7 million. In addition to the resumption of general activities in the post-pandemic period, the recovery in the audiovisual sector is due to a cultural and behavioural change brought about by the pandemic: the change in consumption through *streaming*.

In the midst of this growth in demand, there are points that favour Brazil, especially São Paulo, making it more attractive: **(a)** the perception of the city as a space of great cultural diversity, a cosmopolitan place; **(b)** the presence of good infrastructure in the city; **(c)** the national currency (real) is weak against the dollar, and **(d)** local incentive policies such as the *Cash Rebate* program and the new decree on filming in residential areas. However, there are barriers that need to be addressed to expand the process of internationalizing production in the city of São Paulo, such as unlocking the bureaucracies that sometimes hinder production, making this process more fluid, even though, due to government involvement, there may be more bureaucracy. It is also necessary to improve technicians, especially those in contact with international productions.

Another point to consider: how will global incorporate, or not, specific local dynamics and needs within a more general production chain? A topic like the need for increase and qualification of the workforce in the Brazilian audiovisual industry must be in dialogue with local demands for inclusion and diversity.

The Associação dos Profissionais do Audiovisual Negro [Association of Black Audiovisual Professionals] (APAN) structured the incorporation of this agenda into the broader discussion about the needs of audiovisual development based on three axes: training, dissemination, and market.

The difficulties black people face in accessing training to work in the audiovisual market are like inclusion problems they face in other areas. In this way, general points of policies that promote inclusion could be incorporated by the audiovisual sector, in parallel with the search for specific contributions that this sector can create for the broader agenda.

These policies should not only recruit black people to work but also encompass the appropriation of technologies, and cinematographic and audiovisual language, fostering visibility, representation, and access. This incorporation needs to consider not only the labour force of black people but their different views of society and Brazil.

The *streaming* growth and the arrival of international *players* created an intense dispute between platforms, producers, and a demand for local content. One of the possible scenarios resulting from this growth is the market concentration in large producers since the new volume of work would require greater operational capacity and cash flow, which small producers would not be able to follow. This possibility is contrary to the APAN's view of how the market could work, with the coexistence of companies of different sizes and a variety of business models, that is, against the logic of a few companies concentrating production in the segment.

The transformation and improvement of the audiovisual market must consider the inclusion of portions of the population that have suffered discrimination, not only with new employment opportunities but also by incorporating their worldview. Decentralization is also part of inclusive measures as there is a concentration in the Southeast to the detriment of other regions of the country.

---

Among the possible actions for the implementation of inclusive and qualification policies, APAN's highlights are its interaction with the government and the work to build and strengthen a network of suppliers through 3 platforms:

---

Todes Play, APAN's *streaming* platform;

---

RAIO, a black talent recruitment agency with a broader scope of gender and territoriality; and

---

APAN EAD, program focused on specific parts of the market with no black professionals.

---

Another question raised by the discussion about the concept of "glocal" is which audience one wants to reach, and which production characteristics should be considered for this to occur. What are the terms for the dialogue of the audiovisual sector with the Brazilian population? What elements to consider? And what is the attractiveness of these messages? Historically, the sector wants a dialogue with the Brazilian people to produce in Brazil

and for Brazilians. To create works aimed at Brazilians, based on their culture, that might generate reflection and debate. The perspective is that in going deep into the rich Brazilian melting pot, which is something original for the world, this production generates international interest. In this context, São Paulo already has a vocation to tell stories going beyond our borders, with a strategy that focuses on the local and reaches the global level.

Along the same lines, it is critical to emphasize the importance of encouraging new *film commission* initiatives. They impact the directors, both national and international, benefiting society. Among them, the highlights are socioeconomic and cultural benefits.

The audiovisual sector is not slow as other industries in the installation process in a location. The audiovisual sector can promote change, generate local investment, and employ people soon after arriving at a location. Another positive element is the promotion of soft power and the rise of self-esteem in the populations of the places where filming happens.

Constructing a perspective that considers "glocal" issues for consolidating the Brazilian audiovisual development involves producing and using reliable data about the sector. The local dynamics of the Brazilian market and society are already complex in and of themselves. With the incorporation of external variables, the analysis and decision models become even more sophisticated. Spcine has produced and compiled data since its foundation, organizing information and publicizing it to the entire sector.

The current challenge is disseminating a culture of production and use of data, showing its relevance. Events, productions, and associations can produce and gather more detailed information so that it is possible to understand the gaps, pending issues, demands, and bottlenecks for the development of the audiovisual sector. Based on this, it will develop and suggest more consistent policies.

---

## References

Associação dos Profissionais do Audiovisual Negro (APAN)

<https://apan.com.br>

Banco Nacional de Desenvolvimento Econômico e Social (BNDES)

<https://www.bndes.gov.br/wps/portal/site/home/financiamento/produto/bndes-fundo-cultural>

Boutique Filmes

<https://boutiquefilmes.com.br>

Spicine channel on YouTube

<https://www.youtube.com/c/Spicine>

data\_labe - Data and narrative laboratory in the favela of Maré, Rio de Janeiro

<https://datalabe.org>

Electrica Cinema & Vídeo

<http://www.electrica.com.br>

Festival Internacional de Curtas de São Paulo Curta Kinoforum [São Paulo International Short Films Festival Curta Kinoforum]

<https://kinoforum.org>

Festival Perifericu - Festival de Cinema e Cultura de Quebrada [Perifericu Festival - Culture and Cinema Festival of the Hood]

<https://www.instagram.com/festivalperifericu>

Fórum Brasileiro de Ensino de Cinema e Audiovisual (FORCINE)

<http://www.forcine.org.br>

Funcultura de Pernambuco

<http://www.cultura.pe.gov.br/pagina/funcultura>

Instituto Brasileiro de Geografia e Estatística (IBGE) - Municipal Basic Information Survey - MUNIC of 2018, with a section on culture

<https://www.ibge.gov.br/estatisticas/sociais/saude/10586-pesquisade-informacoes-basicas-municipais.html?edicao=25506&t=sobre>

Instituto Brasileiro de Geografia e Estatística (IBGE) - Sistema de Informações e Indicadores culturais [Information System and Cultural Indicators]

<https://www.ibge.gov.br/estatisticas/multidominio/cultura-recreacao-e-esporte/9388-indicadores-culturais.html?=&t=resultados>

Instituto Brasileiro de Geografia e Estatística (IBGE) - Sistema IBGE de recuperação automática (SIDRA) -

Tabela com dados de unidades locais, inclusive do audiovisual, com CNAE a 4 dígitos e recorte até municípios [IBGE automatic recovery system (SIDRA) -

Table with data from local units, including audiovisual, with 4-digit CNAE and cut to municipalities]

<https://sidra.ibge.gov.br/tabela/6450>

---

**Mapeamento das entidades representativas do setor audiovisual no Brasil [Mapping of representative entities of the audiovisual sector in Brazil]**  
<https://www.cena.ufscar.br/wp-content/uploads/2022/01/Mapeamento-das-Entidades-Representativas-do-Setor-Audiovisual-no-Brasil.pdf>

**Moonshot Pictures**  
<https://www.moonshot.com.br>

**Mostra Internacional de Cinema de São Paulo**  
<https://45.mostra.org>

**Motion Picture Association of Brazil**  
<https://www.mpa-americalatina.org/pt-br>

**Olabi**  
<https://www.olabi.org.br>

**Olsberg SPI**  
<https://www.o-spi.com>

**Plataforma Ancestralidades [Platform Ancestry]**  
<https://www.ancestralidades.org.br>

**PretaLab**  
<https://www.pretalab.com>

**RAIO Agency - Rede Audiovisual de Inclusão Orquestrada [Audiovisual Orchestrated Inclusion Network]**  
<https://apan.com.br/raio>

**Sindicato dos Trabalhadores na Indústria Cinematográfica e do Audiovisual (SINDCINE)**  
<http://www.sindcine.com.br>

**Spcline**  
<http://spcline.com.br>

**Spcline - Impacto socioeconômico no setor audiovisual de 2015 a 2021 [Socioeconomic impact on the audiovisual sector from 2015 to 2021] - Accessed in: 31 Oct. 2022**  
<http://spcline.com.br/wp-content/uploads/Spcline-Impacto-socioecono%CC%82mico-no-setor-audiovisual-de-2014-a-2021-Versa%CC%83o-Online.pdf>

**Spcline - Programa de Atração de Filmagens à Cidade e ao Estado de São Paulo [Film Attraction Program for the City and State of São Paulo] - Cash Rebate**  
<http://spcline.com.br/cash-rebate>

**Taturana - Mobilização social [Social mobilization]**  
<http://www.taturanamobi.com.br>

**Transmercado**  
<https://www.youtube.com/watch?v=3sD3nOChXDI>

## Spicine

President

**Viviane Ferreira**

Director of Investments and Strategic Partnerships

**Luiz Toledo**

Director of Innovation and Audiovisual Policies

**Lyara Oliveira**

Manager of Investments and Strategic Partnerships

**Flávia Gonzaga**

Spicine Observatory Coordinator

**Victor Hugo Batista Pires**

Spicine Observatory Advisor

**Jax Rocha da Silva**

## Copyright © – Iniciativa Cultural - Instituto das Indústrias Criativas

President

**Alessandra Meleiro**

Vice-President

**José Márcio Mendonça**

Creative Director

**Viviana Bueno**

Financial Director

**Vania Cerri**

## Publication credits

General Coordination

**Alessandra Meleiro**

Editorial Coordination

**Liliana Sousa e Silva**

Video Transcription

**Arabera Traduções**

Text editing

**Fábio Gomes, Liliana Sousa e Silva and Paulo Roberto Cidade**

Proofreading

**Gizane Silva**

Graphic Design and Layout

**Valéria Marchesoni**

## International Cataloging in Publication Data (CIP)

F745s

Spicine Forum (1 : 2022 : São Paulo, SP)  
Summary of debates and proposals | Spicine Forum: Agenda for the restart of the audiovisual setor / 1st Fórum SPCine, 10-12 May 2022, São Paulo ; coordinated by Alessandra Meleiro. – Eletronic document. – São Paulo Instituto das Indústrias Criativas, 2022. – Acess mode: <http://iniciativacultural.org.br/sintese-dos-debates-e-proposicoes-do-i-forum-spicine-agenda-da-retomada-do-setor-audiovisual/>

ISBN: 978-85-63825-04-9

1. Spicine. 2. Public policy. 3. Audiovisual. 4. Restart. I. Title.

CDD – 791.43 (20<sup>th</sup>)

CDU – 791.4

Catalog sheet prepared at the UFSCar Community Library  
Librarian in charge: Arildo Martins - CRB/8 7180