

**Film Distribution in Greece:
Formal and Informal Networks of Circulation since the
Financial Crisis**

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Review

Film Distribution in Greece:

Formal and Informal Networks of Circulation since the Financial Crisis

Distribution, the often-unnoticed link in the chain between production and consumption, is increasingly recognized as critical for the study of film and media, and of culture more broadly. In the last fifteen years or so, developments in digital technologies have led to an exponential increase in the circulation of information and audiovisual content; these have, in turn, intensified the necessity to understand the formations of increasingly complex networks, pathways and flows of exchange. Film distribution forms part of this broader system. The patterns and processes of film distribution are often global: Technological advances are readily adopted in different parts of the world, while a handful of powerful players control the official channels and dominate in most markets. Despite such effects of globalization, however, the pace, processes and rate of change are not the same everywhere – nor are the initial conditions upon which change may occur. Industrial, social, political and economic factors present national and local differentiations, while residual practices co-exist with novel ones.

This article focuses on film distribution in Greece. By situating this national case study in a global context, it aims to offer a contribution not only to the understanding of this particular national industry, but to its relation to broader networks of circulation and exchange. Based on extensive interviews with industry members, it examines the structure and processes of both formal and informal film distribution in Greece in 2015 (when the interviews were taken), while also referring to the preceding period, especially since the advent of the financial crisis. Its aims are

threefold: As a media industries study, it focuses mostly on formal distribution; it aims to identify the main players that are involved in the process of rights acquisition and promotion of feature films in Greece, and explain their working practices. From a film studies perspective, it explores the mediating role of - both formal and informal - film distribution in helping (re) define and question the notion of national cinema. And finally, from a broader cultural studies angle, it presents a profile of the country in terms of what films circulate and how they are being watched, while pointing to comparisons with global and other national patterns of change. The fact that Greece was one of the European countries most visibly affected by the financial crisis of 2008 gives the analysis that follows additional heuristic value: it allows us to examine the effect of the financial crisis and the extent and ways in which it affected the ecology and landscape of film distribution at a time of broader global transitions driven by technology and economy.

Film distribution: definitions, practices and approaches

The development and widespread adoption of digital technologies has led to what Alisa Perren called a 'lack of certainty about what constitutes distribution today'.¹ In the context of film distribution, the most obvious changes have occurred in the physical means by which films are reproduced and transported: pre-digitally, a certain number of film copies had to be printed at a considerable cost, and transported to the cinemas where they would be screened. The introduction of digital projection in cinemas has substituted this process with the production of the much cheaper and more easily transportable DCP (Digital Cinema Package) files. Furthermore, the

¹ Alisa Perren, 'Rethinking Distribution for the Future of Media Industry Studies', *Cinema Journal* vol. 52, no.3 (2013), p.171.

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proliferation of different kinds of home and mobile viewing – from the introduction of the VHS in the 1980s, to DVD in the 1990s, BluRay in the 2000s, and a range of VOD, streaming and downloading options in the 2010s – has not only challenged the perception of what is ‘distribution’ but also what is ‘film’.² The digital revolution has also involved a dramatic lowering of the cost of film production, and enabled, as a result, an unprecedented number of films to be made independently. Far from enabling disintermediated access to more films, such abundance has rendered the role of distribution and its new official and unofficial gatekeepers increasingly more crucial in determining what will be seen, where and how.

Until recently, studies of film distribution have tended to focus almost exclusively on formal distribution either condemning or simply not engaging with the informal modes of circulation. In part, this was the result of methodological choices, such as the embrace of a political economy approach of media industry studies. But it was also consequence of the fact that so called ‘piracy’ was less prevalent in the pre-digital media landscape. As top-down examinations of corporate power and control, studies by Philip Drake, Thomas Schatz and Janet Wasko have focused on the globally dominant major conglomerates in Hollywood and examined the practices adopted for securing their position of dominance.³ Taking this approach a step further Yannis Tzioumakis’ examination of independent American cinema, has emphasised

² Virginia Crisp, *Film Distribution in the Digital Age: Pirates and Professionals* (London: Palgrave, 2015), pp. 8-11.
³ Philip Drake, ‘Distribution and marketing in Contemporary Hollywood’ in *The Contemporary Hollywood Film Industry*, ed. Paul McDonald and Janet Wasko (Malden, MA: Blackwell, 2008); Thomas Schatz, ‘New Hollywood, New Millenium’ in Warren Buckland (ed) *Film Theory and Contemporary Hollywood Movies* (New York: Routledge, 2009), pp.19-46; Janet Wasko, ‘The Future of Film Distribution and Exhibition’ in Dan Harris (ed) *The New Media Book* (London: BFI, 2002), pp.195-208; Janet Wasko, *How Hollywood Works* (London: Sage, 2003).

the synergies between the independent sector and the studios, and placed distribution at the heart of definitions of independence.⁴ Also within a US context, Geoff King has explored Internet self-distribution for very low budget films, and illustrated how the new technologies can empower small independent producers.⁵

King's self-distribution case studies border on the informal, in so far as they all fall outside the established system that is practiced and endorsed by major players. However, since the objects distributed – the films – are made by the producer/distributors with very low to no-budget and own their copyright, such informality does not raise ethical issues, nor does it break any laws. In contrast, Ramon Lobato, who introduced the terms 'formal' and 'informal' in the context of film distribution, focuses on informal networks usually referred to as piracy.⁶ Lobato avoids using the term 'piracy' because its negative connotations refer to its (assumed) economic consequences both in terms of copyright infringement and therefore the loss of financial rewards for the creator; and in terms of sustaining a black market economy, and therefore resulting to financial losses for the state. Instead, Lobato foregrounds the cultural significance of informal film distribution, and takes a global approach by considering the ways in which it is experienced and practiced in different contexts - from Nigeria to Mexico, from Australia to the US. While using the terms 'distribution' and 'circulation' almost interchangeably, Lobato prioritises the former in order to underline the continuing significance of agency in this process – a

⁴ Yannis Tzioumakis, *American Independent Cinema: An Introduction* (Edinburgh University Press, 2006); Yannis Tzioumakis, *Hollywood's Indies: Classics Divisions, Specialty Labels and the American Film Market* (Edinburgh: Edinburgh University Press, 2012).

⁵ Geoff King, *Indie 2.0: Change and Continuity in Contemporary American Indie film* (London: I.B.Tauris, 2014), pp. 77-121.

⁶ Ramon Lobato, *Shadow Economies of Cinema: Mapping Informal Film Distribution* (London: BFI, 2012).

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terminological and conceptual approach that is also adopted in this article.⁷ In doing so, he demonstrates both the site-specific and subterranean ways in which such circulation develops, as well as its global reach. For Lobato, in other words, distribution is both a cultural and an economic activity, shaped by questions of power. Examined from a cultural perspective, film distribution offers insights to why and how particular films reach audiences, and illuminates the different dynamics between either officially sanctioned or self-appointed mediators and their publics.

While Lobato focuses on informality, Crisp adopts an inclusive view of distribution and argues that formal and informal networks inform each other and co-exist in a symbiotic relationship.⁸ Following the terminology introduced by Lobato, by ‘formal’ she refers both to studio-controlled distribution that involves a range of strategies that aim to secure maximum product visibility and profits; and to smaller scale, but official, independent distribution whereby the rights of films are sold by producers (and sales agents) to distributors for certain territories.⁹ By ‘informal’, she refers to unlicensed circulation of films through a range of digital means, and stresses the variety of purpose and motivation behind such activity (economic or more broadly social and cultural).¹⁰ While recognizing the difference between the two modes of distribution, Crisp avoids both plainly condemning all informal activities, or

⁷ Authors who prioritise the term ‘circulation’ tend to highlight the role that digital means of dissemination has played in challenging conventional hierarchies between those who supply and those who consume media, and thus challenge the dynamic between top-down and bottom-up relationships. For such approaches, see Dina Iordanova and Stuart Cunningham (eds), *Digital Disruption: Cinema Moves On-line* (St Andrews: St Andrews Film Studies, 2012); Henry Jenkins, Sam Ford and Joshua Green *Spreadable Media: Creating Meaning and Value in a Networked Culture* (New York and London: New York University Press, 2013).

⁸ Crisp, *Film Distribution in the Digital Age*, pp. 161-162, 176-178.

⁹ Ibid., pp.16-55.

¹⁰ Ibid., pp.76-99.

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3 subversively celebrating them as utopian for giving unlimited access to users. Instead
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5 she stresses the importance of situating any such activity in its specific context and
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7 highlights how the formal and the informal are not always in competition, but can
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9 even benefit from the other in generating interest in particular cultural products, as
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11 well as fostering creativity and innovation.¹¹ This article recognizes the value of such
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13 a symbiotic approach and acknowledges the significance of considering both systems
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15 of distribution in relation to each other. However, given the dearth of published
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17 material on the formal distribution in Greece, and the methodological choice of direct,
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19 named interviews with specific industry agents rather than a more wide-ranging
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21 ethnographic approach with users, the article's emphasis will be more tilted towards
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23 the formal organization and workings of the distribution system in Greece. Informal
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25 practices will also be examined through an analysis of the discourses of industry
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27 members and enforcement agencies - rather than users - on the topic.
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34 Before moving on to the specific discussion of film distribution in Greece, I want to
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36 make some points about the significance and value of framing the study in a national
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38 context. This is particularly important as one can argue that distribution is the most
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40 transnational sector of the film industry, since it involves the circulation (within and
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42 beyond a particular national territory) of both national and non-national films. Indeed,
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44 while bound by regulations regarding the territories in which they operate, rarely do
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46 film distributors deal exclusively with national films. Indeed, we can argue that there
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48 is a reverse relationship between the size and international appeal of a particular
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50 national film industry and the extent to which its distribution sector deals with
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52 national product. In the US, for example, and despite the differences between studios
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58 ¹¹ Ibid., pp.154-179.
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and indie distributors, the vast majority of films that circulate nationally – and internationally – are from the US. In a major film producing European country, like France, with extensive policies and practices that promote its national cinema, distributors handle a significant percentage of national films alongside US and other European films. Finally, in a small European country like Greece, distributors deal mostly with non-national films, with releases of domestic films – especially in the years since the crisis - in a minority.¹² To be specific, in Greece the theatrical market consists mainly of US and European – mostly French - films, with releases of other cinemas very limited and almost exclusively dependent on festival hits. Indicatively, in 2015 the Greek theatrical market consisted of 77% of the overall gross from US films; 11% from French; and 8% from Greek films, leaving a meager 4% to be shared among the rest.¹³

However, while film distribution is a transnational practice due to the variable national origin of the product that circulates and to the cross-country agreements among its formal agents, national particularities are evident both formally and informally: territorial restrictions and legal limitations bind the formal side of the business, while informal practices tend to cluster differently in national contexts, not least (but not only) because of nation-based frameworks of enforcement. For such reasons, and in order to enable a more subtle and informed global analysis of film distribution, the nation-state remains a valid unit of analysis. The focus on the national is also facilitated by the fact that national bodies can provide useful data,

¹² On France, see Unifrance (<http://en.unifrance.org/>). Data on Greece from the Greek Film Center (<http://www/gfc.gr>). Both accessed on 14 August 2016.

¹³ Data from the Greek Film Center. While co-productions slightly complicate the picture, especially in terms of the national origin of European films, the overall picture is not radically affected.

such as domestic theatrical box office. Data such as unit sales or downloads or other means of circulation (DVD sales, VOD downloads, even television viewings) are harder, or near impossible, to obtain as they are usually kept within the confidential confines of particular companies' accounts. Existing nation-based explorations of distribution, however, are often restricted by language barriers as they seem to be of relevance only to the particular national context – see, for example, François Garçon's historical account of film distribution in France until the 1950s.¹⁴ In the Anglophone world, the special issues on distribution and film festivals in *Studies in Australasian cinema* (2015 and 2016), which focus on the Australian context or Geoffrey Macnab's (2016) historical exploration of UK-based film distribution, offer good recent examples of framing their inquiries in a global, rather than exclusively national framework, while primarily serving to illuminate the national.¹⁵

In the case of small national markets, such as Greece, that rely mostly on imports, formal distribution specifically refers to officially registered businesses that obtain and handle the rights for distributing films in particular territories. These, in the case of Greece, usually consist of Greece and Cyprus, as the Greek-Cypriot market is too small to be independently viable. Furthermore, linguistic and cultural similarities enable sharing the subtitling and marketing localization of the films prepared for the Greek market.¹⁶ Such companies may or may not distribute domestic films, or be

¹⁴ François Garçon, *La Distribution Cinématographique en France 1907-1957* (Paris: CNRS, 2006).

¹⁵ *Studies in Australasian Cinema* Vol. 9, no. 1 (2015) and vol. 10, No.1 (2016); Geoffrey Macnab, *Delivering Dreams: A Century of British Film Distribution* (London: IB Tauris, 2016)

¹⁶ On the process of localization in the Greek context, see Yannis Tzioumakis and Lydia Papadimitriou, 'My Big Fat Life in Ruins: Marketing 'Greekness' and the Contemporary US Independent Film', in Nolwenn Mingant, Cecilia Tirtaine and Joel Augros (eds), *Film Marketing in a Global Era* (London: BFI, pp. 36-46).

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involved in producing them. It should be noted that formal distribution also refers to the system of film festivals that function as alternative distribution networks by showing films that may not get general release in the particular territory; as well as to film clubs and other education-oriented alternative contexts that enable audiences to reach films, in a peripheral but officially sanctioned environment. While both these practices (film festivals and educational cine-clubs) are active in Greece, the discussion of formal distribution that follows will focus on the commercial system.

When it comes to informal distribution, or piracy, national delimitations are still present but often harder to identify. This is largely because informality knows no bounds and despite a number of measures taken in specific territories to restrict and persecute unregulated streaming or downloading, national or state boundaries are permeable. It is worth noting, however, that the linguistic factor also proves critical in definitions of the national in an informal context, as the demand for subtitled films leads to the creation of sites addressed predominantly to a national audience, and consequently facilitates the identification and persecution of these sites – both topics that shall be discussed later. In what follows I will map out the system of commercial formal film distribution in Greece as of 2015, while also referring to some of the changes that took place in the preceding years.

Formal film distribution in Greece

17 distribution companies are currently active in Greece. With differences in size, capitalization, age, origin and overall profile, they are all legal rights holders for films and they are all based in Athens. Four of the companies - UIP, Odeon, Feelgood and

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3 Tanweer - represent US studios, and together with Spentzos, in the first quarter of
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5 2015 they covered 96% of the market in terms of box office returns.¹⁷ The remaining
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7 13 are medium to small outfits, with some variation in size, profile, longevity and
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9 working practices. Below I will present these companies individually in order to
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11 provide an overall picture of the landscape of formal film distribution in Greece and
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13 its characteristics in 2015, while pointing to transformations that occurred in the years
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15 since the first impact of the financial crisis.
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21 *(a) Larger distributors*
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25 Given their dominance, it is useful to group the five larger distributors together and
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27 facilitate a comparison of their history, structure, profile and working practices.¹⁸
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29 With the exception of UIP Greece (United International Pictures)¹⁹, which is the
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31 office for Paramount and Universal, all other distribution companies in Greece are
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33 (also) involved in independent acquisitions. As a subsidiary of the two studios, UIP
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35 started operations in Greece in 1973.²⁰ The company is owned by the Netherlands-
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37 based UIP BV, which represents the US studios in Europe. Greece has one joint
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39 studio office (rather than two individual ones) because it is a small market – it
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41 represents 0.8% to 0.5% of international sales for the studios; in larger countries,
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43 since 2007 the two studios have separate offices. The company releases between 10
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49 ¹⁷ Box office data from Mariliza Totomi, UIP.

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51 ¹⁸ The discussion below does not aim to assess the companies' relative size, as such
52 financial data is confidential, and falls beyond the scope of this study.

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54 ¹⁹ <https://www.facebook.com/UIP.Greece/>. Accessed on 14 August 2016.

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57 ²⁰ Gasparinatos, Konstantinos, Ioannis Ioannidis and Konstantinos Tsakiris (2000) *H*
58 *Katastasi tou Sistimatos Dianomis stin Ellada/The State of the Distribution System in*
59 *Greece*. Available online at:
60 http://www.ekke.gr/estia/gr_pages/gr_cinema/Cinema99/Cinema99.htm Accessed on
14 August 2016.

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and 20 films a year, depending on the line up of each studio and it is only responsible for the theatrical releases.

Instead of having their own local offices, the remaining four studios have opted for the system of licensing, which is common for small markets: in return for a percentage of the box office gross, local distribution companies handle the studio's films. The system works as follows: the studio provides the Greek distributors the films, determines the size and type of release (number of copies, screens etc.), and provides the marketing materials; the local distributor releases the film and collects its percentage of the gross (after the exhibitor has subtracted their cut); it keeps the agreed percentage that counts as its fee (usually around 10%), as well as any other costs incurred, and returns the rest to the studio. The process has low risks for the local distributor, and can provide some relatively stable income (given that, on the whole, studio products are safe bets). But the profit margin for the local distributor is limited. While the studio makes the decisions, the local distributor can offer advice about what films to release theatrically, and, if necessary, alters the recommended dates of release to accommodate local factors that may work adversely.

As noted above, for the three companies discussed next, studio films are only part of their slate; the rest consists of independent films purchased in markets for a certain number of years (around 10), and usually for exploitation at all platforms. By 'independent' I adopt here the terminology of the industry and refer only to the way in which a film is dealt with at the distribution level. In other words, even if a studio distributes a film domestically in the US, it is considered independent for a particular market if it is not released through a studio there, but goes through the process of

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3 acquisition by a local distributor instead.²¹ Note also, that the concept of
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5 independence in this context is detached from a film's country of origin. In other
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7 words, both American and European (or any other) films are equally referred to as
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9 independent – even if the acquisition of particular European films offers distributors
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11 certain advantages either at European level (through the MEDIA programme) or
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13 through nation-specific deals (such as through France's body of international film
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15 promotion, Unifrance). Greek films, on the other hand, are separately categorized as
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17 the terms and conditions of the distribution company's involvement (and the
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19 percentages of the rights returns) differ. As a more clearly entrepreneurial activity,
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21 independent acquisitions have higher risks but also greater possible returns for the
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23 local distributors. However, aside from providing some relatively stable income,
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25 holding a studio license also increases the bargaining power of local distributors with
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27 exhibitors, and enhances their profit prospects. This is because as studios are more
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29 desirable for exhibitors - given the higher average box office returns for studio films –
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31 distributors can more easily 'place' their independent films in cinemas when they also
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33 deal with studio products. There is, in other words, an unofficial relationship of
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35 reciprocity between distributors and exhibitors that favours larger companies.
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37 Currently, the three companies that hold the rights for the remaining studios are
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39 Odeon, Feelgood and Tanweer - three companies with very distinctive profiles that I
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45 will examine below.
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56 ²¹ For further explorations of the concept of independence, see Tzioumakis,
57 *Independent American Cinema*; Geoff King, *American Independent Cinema* (London:
58 I.B.Tauris, 2005), Crisp, *Film Distribution in the Digital Age*.
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Odeon is the largest and oldest distribution company in Greece, and has represented Fox for over 10 years.²² It is the only remaining fully vertically integrated company, with activity in production and exhibition, as well as in house facilities for printing DVDs and BluRays and the only distributor-owned pay-per-view Video-on-Demand platform, Pame Odeon (launched in 2014).²³ Its history goes back to Damaskinos-Mihailidis, the largest distribution company in post-war Greece.

It is worth briefly tracing the company's transformations over the years, because they illustrate the family-based nature of ownership and management of the company, which is indicative of a lot of enterprise activity in Greece, and arguably accounts for the resilience of established structures in the distribution industry (as elsewhere). It also highlights that – with a few exceptions of recent entries – the key players in the distribution sector in Greece have been stable for years, even if the names of their companies and their specific roles within them have changed. Established by Theofanis Damaskinos and Victor Mihailidis in 1946, in the mid-1980s Damaskinos-Mihailidis merged with the other large distributors to form the Greek Film Union - ELKE. Soon afterwards, ELKE broke up into three companies, one of which - ELKE A.E. – had as major shareholders Yorgos Mihailidis (son of Victor) and Yorgos Krezias.²⁴ In the 1990s Manos Krezias (son of Yorgos) took over the company from his father, and he and Mihailidis – who later left the company - rebranded it as Odeon.²⁵ Krezias is now the company's sole owner and its managing director.

²² <http://odeon.gr/gr/>. Accessed on 14 August 2016.

²³ <http://www.pameodeon.gr/?lng=1>. Accessed on 14 August 2016.

²⁴ The other two were Nea Kinisi and Prooptiki AE.

²⁵ The word Odeon was chosen for its Greek meaning as 'conservatory' and 'auditorium'. The similarity with the title of the UK cinema chain is entirely coincidental.

As a vertically integrated company, Odeon was particularly affected by the post-2009 crisis, but despite strains – evident more clearly in its production and exhibition sectors, but also suggested in its separation from Rosebud that will be discussed later – it has remained resilient. During the broader boom in the audiovisual sector in Greece in the 2000s Odeon benefitted multiply from its vertical integration.²⁶ Its productions – mostly comedies – had been highly profitable, and its investment in multiplexes, as well as the acquisition, refurbishment and rebranding of some of the prime single screen cinemas, especially in Athens, made it the second largest exhibitor in Greece after Village Roadshow.²⁷ After the crisis, however, returns on new productions reduced significantly, leading to slashed investment and more box office flops. As for screen ownership, from an average of 80 screens in the 2000s, by 2015 Odeon owned less than 60.²⁸

²⁶ On developments in Greek cinema in the 2000s, see Lydia Papadimitriou ‘The National and the Transnational in Contemporary Greek Cinema’, in *New Review of Film and Television Studies*, vol. 9, no.4 (2011), pp. 493-512; Maria Chalkou, ‘A new cinema of ‘emancipation’: Tendencies of independence in Greek cinema of the 2000s’, *Interactions: Studies in Communication & Culture* vol. 3, no. 2 (2012), pp. 243–261.

²⁷ Most exhibitors, including Odeon, do not own the real estate of their cinemas –but rent them out from property developers or other owners.

²⁸ For a list of multiplex and single screen sites currently run by Odeon, see: <http://odeon.gr/gr/?q=node/275>. In the fall of 2015, a few months after my interviews with Makis Diamandopoulos and Dimitris Varouxis from Odeon, a 12-screen Odeon-owned multiplex in the northern suburbs of Athens, Kosmopolis, closed down. Following this, director and long time Odeon collaborator, Nicos Perakis, shot an antipiracy advert showing shows one of its cinemas being torn down and stressing that piracy leads to job losses: <http://www.nikosperakis.gr/misc-other-en.php#/antipiracy>

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As a distributor, Odeon handles an annual catalogue of about 80 new films (including those by Fox) making it one of the largest players in Greece.²⁹ Just like some of the other large distributors, it has special links with particular independent studios and sales agents – such as the Weinstein Company or HanWay Films (which represents films by established independent directors such as Woody Allen, who is particularly popular in Greece). Such links provide it with early information about projects that will appear on the market as well as informal first refusal privileges for purchasing their films. These purchases happen ‘on paper’, in other words, at the pre-production stage, so the local distributor commits to buying a number films a few years before their completion. For both the production companies and the sales agents, such rights pre-sales (even in small territories such as Greece) contribute towards raising the production funds of the films. For the Greek distribution companies, however, the advantages are more mixed: while it secures them access to desired titles and blocks competitors from acquiring them, it also means that both the date of their availability and the final quality of the film are uncertain. As a result, of the 80 or so films that Odeon handles annually, about 20% of them are never released theatrically and go straight-to-video (and/or television).³⁰

Such practices are typical of the larger distributors - Feelgood, Tanweer, Spentzos - all of which are managed by executives with extensive experience in the Greek distribution sector, even if they now head a recently founded company. Such is, indeed, the case of Feelgood, which is a relative newcomer, as it opened in 2008 at

²⁹ For comparative purposes, it is worth highlighting that in 2015, just over 300 films were released theatrically in Greece. In the period 2009 to 2015 this number has ranged from 224 (in 2012) to 302 (in 2011). Source: Greek Film Center.

³⁰ A side effect of this is that large distributors, like Odeon, cannot respond quickly to market changes by reducing the slate of films they are purchasing and releasing.

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3 the dawn of the financial crisis, and established itself since dynamically in the Greek
4 market.³¹ While its major shareholder is media entrepreneur Yannis Alafouzos³² both
5 its key executives, founder and managing director Irini Souganidou, and general
6 manager Panos Martakis, used to work in one of the largest and most successful
7 Greek distribution companies of the 1990s, Prooptiki (est. 1984). In 2005 Prooptiki
8 was taken over by Audiovisual, a well-capitalised company initially involved in home
9 video, that expanded rapidly and vertically (as well as horizontally) in the 2000s.³³
10 From about 2010-11, Audiovisual ceased its operations as distributor, but remains the
11 third largest owner of multiplex cinemas, continuing, albeit in reduced capacity, its
12 activity in home video.
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27 Feelgood holds the theatrical and video license for two studios, Disney and Sony-
28 Columbia, and the video rights only for Universal.³⁴ It releases theatrically about 20-
29 25 studio films a year. It also buys about 30 independent films in the markets.
30 Following the model of its effective predecessor Prooptiki, and unlike Odeon,
31 Feelgood has no plans to expand into cinema ownership. Instead, in July 2013, it
32 expanded horizontally, by acquiring the music rights for Sony (which until then was
33 directly represented in Greece by the studio).
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45 From the outset, one of Feelgood's distinctive features has been its support of Greek
46 quality cinema, especially Greek art films and documentaries, two categories of
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50 ³¹ <http://feelgoodentertainment.gr>. Accessed on 14 August 2016.

51 ³² By 2016, Alafouzos is the owner of, among many others, Skai TV and the
52 Kathimerini daily newspaper.

53 ³³ <http://www.audiovisual.gr/page.ashx?pid=12&lang=1&foreigncat=36>. Accessed on
54 14 August 2016. Audiovisual is owned by members of the Vardinogiannis family –
55 the long established ship-owning Greek tycoons.

56 ³⁴ As noted before, the theatrical rights for Universal are handled by UIP Greece,
57 which does not deal with video.
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domestic production that have long struggled to find theatrical distribution in the past, and relied almost exclusively on state funds for their production (and, sporadically, distribution). Feelgood has released theatrically in Greece many critically acclaimed Greek films, including many of those branded as belonging to the ‘Greek Weird Wave’, such as Yorgos Lanthimos’ Oscar nominated *Kinodontas/Dogtooth* (2009) and his subsequent *Alpeis/Alps* (2011) or Athina Rachel Tsangari’s *Attenberg* (2010) and, more recently *Chevalier* (2015). In its effort to provide extra visibility and enhance audience reach, Feelgood has experimented with dynamic wide releases and inventive marketing campaigns. For example, Feelgood opened two Greek *film noirs* - a genre previously underrepresented in Greek cinema- *To Mikro Psari/Stratos* (Yorgos Economides, 2014) and *Tetarti 4:45/Wednesday 4:45* (Alexis Alexiou, 2015) in 31 and 28 screens, respectively. While this number of screens is relatively modest compared to the 107 screens for the Greek quality mainstream film *Mikra Agglia/Little England* (Pandelis Voulgaris, 2013) or to the 137 in which UIP opened the studio film *Furious Seven* (James Wan, 2015), it still represents a significant departure from previous practices, and a sign of strong support on the side of the distributor. An example of Feelgood’s experimentation in marketing was the campaign for *I Aionia Epistrofi tou Andoni Paraskeva/The Eternal Return of Andonis Paraskevas* (Elina Psikou, 2014) a film about the alleged disappearance of a fictitious television personality, which provides a critical commentary about the celebrity-obsessed contemporary culture. The promotional campaign blurred the lines between reality and fiction, as it involved a number of Greek celebrities pretending to know the particular character and attesting to his disappearance- in a contemporary take on Orson Welles’ famous broadcast for *War of the Worlds* in 1938.³⁵ Despite such

³⁵ For a discussion of the promotion of this film, see Nikolaidou:

efforts, however, none of these promotional efforts met with the desired commercial success, thus raising questions over the sustainability of such provision.

While Feelgood has tried to utilize its market clout to support some less obviously commercial Greek properties, the most recent entry among large film distribution companies in Greece, Tanweer, has shown no interest so far in Greek films.³⁶ Owned by Joseph Samaan³⁷, it is the first multinational distribution company active in Greece that deals with independent acquisitions. Founded in 2007, the company is active in the MENA territories³⁸ and in Southeast Asia. It started operations in Greece in 2012, and obtained the license to represent Warner (theatrical and DVD/BluRay) in Greece in January 2015. The previous holder for Warner had been Village Roadshow, a company briefly mentioned earlier as the largest exhibitor in Greece. Tanweer and Village have had extensive connections, not only because Tanweer's chief executive in Greece (and my interviewee), Yannis Kalfakakos, used to work in Village, but also because until 2015 the two companies had a deal whereby Village functioned as sub-contractor for Tanweer - in other words, it used to release films purchased by Tanweer alongside its own properties. With the effective withdrawal of Village from the distribution market in early 2015, Tanweer became a full-on distributor, releasing both its independent and studio-licensed films directly to the cinemas.

<http://filmiconjournal.com/blog/category/31/%CE%B7-%CE%B1%CE%B9%CF%8E%CE%BD%CE%B9%CE%B1-%CE%B5%CF%80%CE%B9%CF%83%CF%84%CF%81%CE%BF%CF%86%CE%AE-%CF%84%CE%BF%CF%85-%CE%91%CE%BD%CF%84%CF%8E%CE%BD%CE%B7-%CE%A0%CE%B1%CF%81%CE%B1%CF%83%CE%BA%CE%B5%CF%85%CE%AC> ; for Orson Welles's broadcast, see <http://www.history.com/this-day-in-history/welles-scares-nation> . Both accessed on 14 August 2016.

³⁶ <http://www.tanweer.gr/about-us-2/>. Accessed on 14 August 2016.

³⁷ <http://variety.com/exec/joseph-samaan/>. Accessed on 14 August 2016.

³⁸ Middle East and North Africa

Despite its effective ceasing of operations as distributor from January 2015, it is worth briefly profiling Village Roadshow here because, until it relinquished its license for Warner, it had been one of the two largest vertically integrated companies in the country (the other being Odeon), and remains the market leader in terms of exhibition, currently controlling about 45% of the market in terms of box office. Village Roadshow was founded in Greece in 1997, initially as a subsidiary of the Australian company, and launched the first multiplex in Marousi in Athens, soon establishing itself as a market leader in the multiplex expansion that followed.³⁹ At the outset of the crisis, in 2009, its Australian owners decided to withdraw from Europe, and sold the Village to Greek entrepreneur Dimitris Kontominas, with the right to maintain its brand name.⁴⁰ As a vertically integrated company in its near 20 years of operations in Greece, Village invested significantly in production, (co) financing about 25 medium to high budget films (1 to 1.5 million Euros on average);⁴¹ as a distributor represented Warner and also dealt in independent acquisitions; and as exhibitor, it owned, as noted above, the oldest and most profitable multiplexes.⁴²

³⁹ This multiplex closed down in 2007.

⁴⁰ Dimitris Kontominas is head of DEMCO, and owns, among others, the Greek television station Alpha: <http://www.demco.gr/founder>. Accessed on 14 August 2016. On the sale of the company: <http://www.capital.gr/story/827491>. Accessed on 14 August 2016.

⁴¹ Notable, among them are two of the largest box office grossers in recent years, Tasos Boulmetis' *Politiki Kouzina/A Touch of Spice* (2002), and most recently Christopher Papakaliatis' *Enas Allos Kosmos/Another World* (2015) – the latter as an exceptional release, since Village had effectively ceased its broader distribution operations by then. (*Another World* was financed among others by Alpha TV, sister company to Village, as it is also owned by Kondominas). http://www.ethnos.gr/kinimatografos/arthro/900_000_eisitiria_gia_ellinikes_tainies-64328398/. Accessed on 14 August 2016.

⁴² In 2015, Village owned 72 screens. For details, see: <http://www.villagecinemas.gr/>. Accessed on 14 August 2016.

By representing both studio and independent films UIP, Odeon, Feelgood and Tanweer dominate the distribution market in Greece. However, despite not holding a US studio license since 2004, a fifth and long-running distributor, Spentzos, maintains a significant presence in the market.⁴³ It releases 30-35 independent films annually, while also having activity in both production and exhibition. Established in 1953 by Christos Spentzos, and despite ownership changes in the 1990s, the original family is still involved with the company, as the three founder's sons and especially Yorgos Spentzos have ownership stakes and also remain active in it. The company's current main shareholder, however, is Antonis Maniatis. Maniatis and Spentzos head the team of acquisitions visiting markets and festivals (such as Cannes, Berlin, American Film Market), almost always buying films in early stages. Since the financial crisis they entered into an arrangement with Seven Films, jointly buying and releasing certain films, thus reducing exposure and risk (but also potential returns). The company's longevity, its established links with major sales agents (especially Film Nation and Lionsgate) and –rumoured- high spending on acquisitions, as well as its association with certain cinemas in Athens, such as Ideal and Galaxias⁴⁴ secures it a place among the larger distributors. But without the backing of a studio, Spentzos Films' profile also has similarities with the other smaller sized companies discussed below.

(b) Smaller distributors

The remaining 11 companies currently in operation consist predominantly of medium to small sized distributors that, in the first quarter of 2015, represented only 4% of the

⁴³ <http://www.spentzosfilm.gr/>. Accessed on 14 August 2016.

⁴⁴ As exhibitor, Spentzos does not own multiplexes, but runs five winter and three open-air standalone cinemas in Athens, and has exclusive arrangements with some others, such as Galaxias.

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box office. While from an economic perspective their contribution to the Greek distribution landscape is far less important than the companies discussed above, culturally they are significant not only because they contribute to bringing a variety of films in Greek cinemas, but also because their working practices are representative of the opportunities and difficulties afforded in the sector in a small national market like the Greek one, and especially during the current, post-crisis, period.

One of the challenges these small companies face is to find slots for showing their films theatrically, especially in the cinemas that would serve best the kind of films they represent. This involves complex and subtle processes of negotiation with exhibitors, who are often, effectively, block-booked by larger distributors with whom they have more or less official collaborative agreements. Given that the majority of distributors discussed below deal with art house films, whose theatrical audience average above the age of 45 and who do not tend to frequent multiplexes, the ideal outlet for their films are single screen cinemas, and especially those of the Athenian city center. The number of these cinemas, however, is relatively limited, especially after two of the city center historic screens, Attikon and Appolon, were burnt down during the 2012 riots.⁴⁵ With around 300 films annually competing for theatrical space, finding a good slot in the right cinema can be a significant challenge. This sometimes leads smaller distributors entering into booking agreements with larger distributors who, in exchange for a small cut, use their clout for ‘placing’ the films in cinemas. Or, more adventurously, it turns some small distributors into temporary exhibitors, as they occasionally rent single screen cinemas to prioritise their films. Despite the fact that ancillary markets play a key role in recouping costs, as

⁴⁵ http://reel.gr/attikon_apollon_burned/. Accessed on 14 August 2016.

elsewhere, a theatrical run is highly desirable for the critical attention, prestige and promotion of a film in Greece.

All the companies discussed below are run by their owners; they are often (but not always) family businesses and they have few, if any, additional employees. As a result, their profile directly reflects the personality and tastes of these individuals, who are also the ones involved in acquisitions. In the context of the intense competition for titles among Greek distributors that takes place in markets and festivals - competition that the distributors themselves often characterize as absurd as it pushes the prices of the films too high - the smaller distributors who cannot compete in price tend to stand aside and seek undiscovered and affordable 'hidden gems'. While most of these distributors visit the major festivals and markets for such deals, others seek their fare in more peripheral and specialized ones. As a result, and with the exception of the two companies ran by veteran distributors Takis Veremis and Zinos Panagiotidis, who also buy films at earlier stages, the companies below usually buy completed films.⁴⁶ One criterion that some of these distributors use for choosing films is eligibility for the European Union's MEDIA programme for distribution, as this helps them cover some of their P&A costs.⁴⁷

⁴⁶ Just as with regular international practice, purchasing the rights for a film involves the distributor paying a minimum guarantee (MG) against the potential profits that it may make on its various exploitation windows. Once (and if) the profits exceed the amount paid for an MG, the distributor starts paying further money back to the sales agents/producers.

⁴⁷ Criteria for participation in the programme include the number of European countries that a particular film has been sold to, as well as ensuring that it is released theatrically by a specific date. http://eacea.ec.europa.eu/home/creative-europe/actions/media/distribution/distribution-selective-support_en . Accessed on 14 August 2016.

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Strada Film was launched in 1996, initially as a production company.⁴⁸ Its owner and managing director Takis Veremis worked in the distribution sector in France in the 1990s and, on his return to Greece in the 2000s, he joined the then vertically integrated Audiovisual, while also collaborating with distributor Nutopia for the release of films he bought for Strada. Since about 2009, Strada has been buying and releasing theatrically between 12 and 20 films annually. Among its recent successful releases were *La Vie d' Adele/Blue is the Warmest Colour* (Abdellatif Kechiche, 2013) and *Ida* (Pavel Pawlikowski, 2013). Strada has enough clout to arrange its own theatrical bookings on a film-by-film basis, but in 2015-16 it also took on the management of the city center cinema Elli in order to intensify theatrical exposure of its films. It releases its films on DVD via Tanweer.

One of the most established names among Greek distributors is Zinos Panagiotidis. His company Rosebud 21 was only set up in 2014⁴⁹, but its predecessor Rosebud had been running for 21 years as the quality arm, the ‘specialty division’, of Odeon.⁵⁰ Autonomously managed by Panagiotidis, Rosebud (est. 1993) had been half-owned by himself and half by Odeon.⁵¹ Panagiotidis has been involved in distribution since the 1970s, initially working for others, then setting up his own distribution office and later joining Nea Kinisi, until he left it to form Rosebud. Rosebud 21 represents a reduction in size and a return to a family-business model, as the company belongs to Panagiotidis’s daughter. The number of films it handles annually is also reduced (4-

⁴⁸ <http://www.stradafilms.gr/english>. Accessed on 14 August 2016.
⁴⁹ <http://rosebud21.gr>. Accessed on 14 August 2016.
⁵⁰ For the practice of specialty divisions in US studios, see Tzioumakis *Hollywood’s Indies*.
⁵¹ At different stages, Yorgos Skouras and Yorgos Tziortzios had also had stakes in Rosebud.

8), while it has set up a collaborative agreement with Feelgood for its theatrical bookings.

Other small companies with a profile for a quality film slate include Filmtrade, One from the Heart and NEO Film. Vassilis Sourapas' Filmtrade is the oldest among them, having been involved in theatrical distribution since 2002.⁵² Releasing no more than eight films annually, Filmtrade has a reputation for cautious but sound choices that have secured its relative longevity. Lefteris Adamidis and Sofia Angelidou's One From The Heart was established in 2012, and releases up to five - often European - films per year.⁵³ The couple used to work at Thessaloniki International Film Festival until 2009, with Adamidis programming one of its sections. Set up in 2014, NEO Film is run by Spyros Damianakis. Following a brief educational and work experience (with Voltage Pictures) in Los Angeles, Damianakis returned to Greece in the midst of the crisis and set up the company with his brother by adopting a very cautious approach towards acquisitions and overhead expenses.

Aside from distributors who occasionally venture into exhibition, such as Strada, there are also three exhibitors turned distributors - Ama, Danaos, and Mikrokosmos. Ama Films belongs to the brothers Yorgos and Dimitris Stergiakis, managers of the listed 1930s city center cinema Asty.⁵⁴ The cinema has a long history associated with cinephilia, a profile encouraged by the Stergiakis brothers who in the late spring and early summer months organize consecutive screenings of classic films; as distributors, Ama compete for some of the festival successes – such as for example, the 2014

⁵² <http://www.filmtrade.gr> . Accessed on 14 August 2016.

⁵³ <http://www.onefromtheheart.gr/about>

Accessed on 14 August 2016.

⁵⁴ <http://www.amafilms.gr/home> Accessed on 14 August 2016.

Palme d'Or winner, *Kis Uykusu/Winter Sleep* (Nuri Bilge Ceylan). Established in 1972, initially as one screen, and from 1998 as a two-screen cinema in the area of Ambelokipoi, Danaos has a prestige reputation for comfort and quality. Having remained in the hands of the same family, it is currently owned and managed by Ilias Georgiopoulos, who after years of programming collaboration with Odeon, in 2014 has entered a looser agreement with Feelgood and also started expanding into distribution.⁵⁵ Andreas Sotirakopoulos' Mikrokosmos is an 'alternative' single screen that opened in 2004 in an emerging area of Athens, Koukaki, and quickly attracted a younger clientele of bohemian, often politicized, cinephiles.⁵⁶ Sotirakopoulos' forays into distribution have been similarly fringe for the Greek market, consisting mostly of acquisitions of Spanish-speaking films at the festival of San Sebastian.

To complete the picture, the remaining four distributors are Seven Films, which collaborates with Spentzos and also does its own acquisitions;⁵⁷ the video-club expansion Weird Wave, founded in 2014 by Babis Kontarakis, which also forayed into exhibition with the management of the cinema Astor in 2015;⁵⁸ and two predominantly genre-oriented outfits, Hollywood Entertainment, which tackles mostly comedies⁵⁹; and FilmBoy, which specializes on thriller and horror films.⁶⁰

The above discussion offers a comprehensive snapshot of the formal distribution network in Greece in 2015, and highlights some of its internal dynamics, workings, and power-relations. As mediators, facilitators and key agents in a chain of

⁵⁵ <http://www.danaosfilms.gr/>. Accessed on 14 August 2016.

⁵⁶ <http://www.mikrokosmos.gr/>. Accessed on 14 August 2016.

⁵⁷ <http://sevenfilms.blogspot.gr>. Accessed on 14 August 2016.

⁵⁸ <http://www.weirdwave.gr>. Accessed on 14 August 2016.

⁵⁹ <https://www.facebook.com/hollywoodent>. Accessed on 14 August 2016.

⁶⁰ <http://www.filmboy.gr>. Accessed on 14 August 2016.

interactions that include the relationship between producers and sales agents; sales agents with distributors; distributors with exhibitors and other disseminators; and not least, exhibitors with audiences, these 17 companies are the local official gatekeepers of the films that formally (and commercially) circulate in Greece. The alternative distribution network of film festivals also play a role in this, especially when they screen films that have not been picked up by a distributor for Greece. In this context, festivals act as temporary license holders by paying the relevant rights owners (usually the sales agents) directly for a specific number of screenings at their festival. Of the 40 or so film festivals of all genres and types (features, short, docs, digital, animation, experimental) that take place in Greece annually, only a handful play this role on a national level - the rest having a more specialized or localized function. These are the Thessaloniki International Film Festival, Greece's main festival, and two Athens-based ones: the Athens Film Festival-Premiere Nights, and the Panorama of European Cinema.⁶¹

Returning to the mapping of the distribution companies presented above, it should be stressed that the longevity of this specific configuration is impossible to predict, as companies (especially small ones) open and close quite rapidly. This mapping, however, provides a sound basis from which to explore certain factors of change, on which I will be focusing in what follows. These include the effects of the financial

⁶¹ For a historical account of the festival's transformations, see Lydia Papadimitriou (2016) *The Hindered Drive towards Internationalisation: Thessaloniki (International) Film Festival* in *New Review of Film and Television Studies*, vol.4, no.1 (March 2016), pp. 93-111. For a comprehensive list of film festivals in Greece as of 2009, see Dimitris Theoharis, *Festival Kinimatografou stin Ellada: I Periptosi ton Festival Documentaire/ Film Festivals in Greece: The Case of Documentary Festivals*, unpublished dissertation, University of Crete, p. 8.

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crisis, piracy, and the changing formats of the ancillary markets, through the gradual expansion of online forms of cinematic dissemination.

Factors of change: The financial crisis, piracy and ancillary markets

The effects of the 2008 global financial crisis impacted on Greece about a year later, in late 2009, when the size of the country’s public debt was revealed and severe consequences for the country’s economy began to unfold. Since then the country has faced extensive socio-political turbulence, and entered a period of ongoing economic difficulties marked as high unemployment, drop of GDP and slow growth, among others. Such conditions restricted the average Greek’s disposable income and affected their leisure activities, including cinema going. Until a partial recovery in 2015, the domestic box office figures for this period reflected this downward trend.

More specifically, in 2009 the overall turnover from theatrical releases in Greece was 100 million Euros; by 2014 it nearly halved to 58 million, while in 2015 it went up to 63 million Euros. It is worth noting that the 2015 rise was in line with developments in other territories which saw a rise in theatrical box office receipts driven by the remarkable success of US blockbusters such as *Furious Seven*, *50 Shades of Grey* (Sam Taylor-Johnson), *Spectre* (Sam Mendes) and *Star Wars: The Force Awakens* (J.J. Abrams).⁶² The 42% drop in box office receipts between 2009 and 2014, reflects a significant reduction in the average admission price from 9 (one of the highest priced tickets in Europe) to 6.5 Euros. This price reduction was introduced by

⁶² See Box Office Mojo. For data regarding the UK, see the BFI Statistical Yearbook 2016: <http://www.bfi.org.uk/education-research/film-industry-statistics-research/statistical-yearbook>. Accessed on 14 August 2016.

exhibitors in response to the box office drop, and aimed at boosting the market after two consecutive years of diminishing returns. It targeted specifically younger audiences (it included two-for-one special offers in multiplexes on particular weekdays) and aimed at building new audiences while maintaining existing ones. Therefore, if considered in terms of admissions, the actual drop was less sharp. It was in the region of 30%, as admissions in 2009 were 12 million, dropping to 9 million in 2014 (and recovering at 9.800.000 in 2015).⁶³

While the financial crisis and the broader political instability of this period are key factors behind such a drop, according to some of my interviewees the main problem was piracy and the change in viewing habits, especially among younger audiences. Divergence in opinion on this issue reflects the size and profile of the different companies: representatives of the larger companies tended to consider piracy as the main problem, while smaller distributors usually had a more balanced view, or even disregarded piracy as a serious competitor to theatrical attendance. This is likely a consequence of the fact that the studio and more mainstream films watched predominantly by younger audiences and handled by larger distributors are more popular – and therefore more pirated – than the more specialized, niche, fare of the smaller distributors that is often addressed to more mature audiences who are less prone to illegal downloading and more attached to cinema-going practices. But one can also argue that it reflects the political position of some small distributors who express some understanding, if not sympathy, with informal practices of film viewing.⁶⁴

⁶³ Box Office and admissions data from the Greek Film Center.

⁶⁴ On the political dimensions of piracy, see Virginia Crisp, 'The piratical is political', *Soundings*, vol. 55 (2013), pp. 71-80. Available at

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The variable (perceived) economic impact on their companies is therefore influencing particular distributors’ approach towards piracy and their interpretation of the broader reasons for the box office drop. In what follows I will explore informal film circulation in Greece, in order to illustrate some locally adopted practices, and convey a broader picture of the culture of film consumption in Greece in the post-2009 period. While it is not possible to establish exact cause-and-effect links between the increase of unlicensed downloading and streaming, and the drop in box office performance in the 2009-2014 period, we can nonetheless assert that, in combination with the broader economic and political instability of the period, the availability of such alternative modes of home viewing played a part in reducing theatrical attendance. Indeed, it could be argued that the crisis further encouraged such practices, precisely because the limited disposable income led to the search of cost-free options. However, due to the absence of relevant hard data, such arguments can only be based on circumstantial evidence, and are therefore open to (soft) interpretations.

Indeed, any exploration of informal practices raises different methodological issues than a study of the formal aspects of an industry because the subterranean nature of informality means that accountability and transparency are not only unnecessary, but also actively avoided. More often than not, attempts to quantify piracy are linked with efforts to contain it. Anecdotal knowledge, first hand experience and ethnographic approaches can provide access to qualitative and cultural dimensions of such practices – who performs them, how and why – but such information is often fragmentary and

<http://www.lwbooks.co.uk/journals/soundings/issue/55.html>. Accessed on 14 August 2016.

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3 impressionistic. In the discussion that follows I will rely predominantly on data
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5 provided by enforcement agencies because, despite their ideological bias and outsider
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7 perspective, they represent a reasonably reliable source of quantifiable information.
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12 The main anti-piracy agency in Greece is the Organisation for the Protection of
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14 Audiovisual (Etairia Prostatias Optikoakoustikon Ergon, or EPOE), a not-for-profit
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16 company funded by some of the larger Greek distributors (and initially the studios
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18 themselves) that identifies unlicensed sites that supply audiovisual works in Greece.
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20 EPOE has no direct enforcing authority, and relies on the state's assistance (police
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22 and courts) to persecute and close these sites down. Its aim is to help restore the
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24 capital flow back to its licensed owners, and indirectly help support the broader
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26 audiovisual industry in Greece while also serving the interests of the state in helping
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28 combat black-market activities. Unlike elsewhere in Europe, EPOE functions within a
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30 relatively loose legal framework regarding piracy, as IP providers in Greece are not
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32 required to block unlicensed sites, while users face no legal implications for
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34 downloading or streaming films from them. As a result access and use of such sites is
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36 much easier – a fact that does, indeed, add some credence to claims that piracy is
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38 more rampant in Greece than in other EU countries.
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45 EPOE was initially set up in 1984 in order to combat VHS piracy. With the gradual
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47 demise of videotape, from the late 1990s and through most of the 2000s the main
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49 form of piracy in Greece were illegal copies of DVDs, often smuggled from abroad
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51 and sold by migrant sellers in the streets (a dimension that arguably added a touch of
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53 racism to the anti-piracy drive). By about 2010 physical sales of pirated DVDs had
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55 significantly dropped, and Internet options emerged that rendered the persecution of
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piracy almost exclusively an online affair. With the gradual improvement of bandwidth infrastructures in the country, as well as cheaper and faster computers, the supply of, and access to, piratical sites dramatically increased, and EPOE’s remit focused on targeting those that are located in Greece.

While users can download or stream from sites located anywhere in the world, what distinguishes the sites that are based in Greece is that they provide films with Greek subtitles. According to EPOE, this makes them far more attractive to the user, as they are more convenient and faster to use than the alternative – downloading a film (whether via link or torrent) and then searching for the subtitling files separately. While this makes EPOE’s piracy-containing efforts more manageable, it also highlights the validity of exploring the informal network of circulation in a national context; for while the processes of accessing and sharing files are technologically determined, and therefore the same anywhere in the world, linguistic necessities cluster certain users around particular practices that offer them specific advantages. Subtitles, therefore, informally define a certain territory – one that is not necessarily or exclusively nationally defined (as languages and nations do not necessarily coincide), but that, as in the case of Greece, often is.

As EPOE’s main aim is to protect the economic interests of rights owners, its perception of piracy is similarly economic, as it claims that the primary motivation behind such sites is financial gain. This happens because – especially in the sites targeted by the organization - consumers usually pay a small fee for access to the services (a kind of unlicensed SVoD (Subscription Video-on-Demand)), while they also benefit from Google’s advertising services that depend on the number of page

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3 hits. Such monolithic construction of piracy as, effectively, an activity that seeks to
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5 displace economic benefit from its lawful owners to illegal operations, provides
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7 EPOE with a moral argument for its operations.
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11 Despite its limited resources and the slow response of the state in terms of
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13 prosecutions EPOE claims a number of successes. The first and most celebrated was
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15 the closure of the site Gamato.gr in 2010. At a time when broadband connections in
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17 the country were 1,800,000, the site had 800,000 members and performed 3,200,000
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19 downloads; in other words, about one in two Greeks with Internet connection were
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21 members, and it was one of ten most popular sites in Greece, overall. With increased
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23 broadband speeds and connectivity it is difficult to fully assess EPOE's successes, but
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25 the organisation claims that of the 280 Greek sites they have identified, 50 have been
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27 referred to court, about 160 have closed from fear and there are only about 70 sites
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29 functioning. It is worth noting that by the summer of 2015 none of the court cases
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31 were concluded, reflecting the rather dysfunctional judicial system in Greece, but
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33 EPOE's primary purpose – to stop their operation – was achieved.
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41 Notwithstanding the claimed successes of EPOE, it is hard to fully quantify whether
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43 options for unlicensed downloading and streaming have actually been reduced for
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45 users located in Greece. Anecdotal personal experience suggests that there is no
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47 radical change in such practices, as the assumption that one can find pretty much
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49 almost anything one wants online for free remains undisturbed. Increased and cheaper
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51 availability of VoD provision will likely change attitudes and lead towards more
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53 extensive use of licensed sites as these can be easier and quicker to use. Until the
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55 introduction of Netflix in Greece in January 2016, the VoD market in Greece was
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relatively limited, and consisted mainly of the options provided by the major pay-TV channels, Nova, HolTV, and OTE TV (eg. OTE Cinema on Demand). These combine SVoD and TVoD (Transactional VoD, or pay-per-view), as they require subscription with the respective telecommunications company (Forthnet, Hellas-on-Line/Vodafone and Cosmote), while also entailing further payments for particular on-demand channels, and/or additional pay-per-view. A fourth existing platform, Pame Odeon is only TVoD and does not require telecommunications service subscription, as it is Odeon's in-house online offering. Unlike the above options, however, Netflix does not (as yet) provide Greek subtitles to its content, thus restricting the use of the service to the more educated sections of the audience who are willing and able to watch films in English and/or with subtitles in other languages. For this reason it has not (yet) become a significant factor of disturbance in the distribution landscape of Greece.

Before concluding, it is useful to throw some light on the recent and current landscape of ancillary markets for film distributors in Greece, and explore how both the financial crisis and the changing technological environment have affected ancillary, but important, sources of income in various platforms. Following the theatrical release, the typical order of exploitation in Greece currently is DVD/BluRay – TVoD - Pay TV - SVoD and Free TV. Traditional windows are still upheld, consisting of four months between theatrical and DVD, followed by one month for TVoD, then four months for Pay TV, and finally about 12-13 months for SVoD and Free TV. There have been no day-and-date releases across platforms yet in Greece (for example,

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3 simultaneous theatrical and TVoD releases), largely because the VoD market is still
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5 very small in Greece, but also because such practices are still experimental.⁶⁵
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10 Similar to the global reduction in DVD sales following the introduction and gradual
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12 expansion of on-demand services, the DVD market in Greece also dropped radically
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14 in the 2010s.⁶⁶ However, unlike the US and UK markets which were led by sell-
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16 through, the DVD market in Greece was predominantly rental, with DVDs replacing
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18 VHS in the already established video-stores around the country.⁶⁷ This was paralleled
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20 and ultimately exceeded by the practice of free giveaways for newspapers and
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22 magazines that reached huge proportions in Greece in the mid-to-late 2000s.⁶⁸ Having
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24 started in the late 1990s with the specialized magazine *Cinema*, DVD giveaways
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26 became very widespread in the next decade, bringing great profits to distributors who
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28 block-sold their fare for very generous amounts. However, the print industry's change
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30 of fortunes as a result of both the radical drop in advertising revenue caused by the
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32 financial crisis, and the gradual digitization of newspapers, led to a very rapid
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34 collapse of the DVD giveaway market in the early 2010s and consequently to the loss
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36 of a significant income stream for the distributors. As for the rental market via video-
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38 stores, it also gradually shrunk mainly as a result of the new technologies and piracy.
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45 With income from DVD significantly shrinking, the ensuing windows become ever
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47 more important for distributors. With regard to TVoD, aside from the national players
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50 ⁶⁵ See Crisp, *Film Distribution in the Digital Age*, pp. 67-74

51 ⁶⁶ On global patterns, see Paul McDonald, *Video and DVD industries* (London:
52 Palgrave Macmillan, 2007).

53 ⁶⁷ One exception to this pattern is children's films (especially Disney) that continue to
54 perform well on sell-through. In Greece postal DVD rental services did not take hold,
55 possibly due to the relative unreliability of the postal service.

56 ⁶⁸ <https://www.theguardian.com/business/2006/aug/18/media.film>. Accessed on 14
57 August 2016.
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noted above, Greek distributors can also sell to international platforms, such as Google play or I-tunes. Because of geoblocking, such providers need to clear the rights for particular films from the rights owners within each territory – opening up a new source of income for the distributors. As opposed to sales to national VoD platforms and pay or free television channels, which happen directly from the distributor, access to international platforms happens through aggregators, which function as intermediaries between the platforms and the local distributors. While the VoD market in Greece is expected to grow, it remains limited, and industry members assess that it is highly unlikely that it will ever reach the heights of the DVD boom of the 2000s. As data about pricing is unavailable, it is not possible to fully gauge the financial impact of the crisis for distributors through the ancillary markets, but one can plausibly assume that it was significant. With the exception of the prospects offered by VoD and pay TV, the DVD market is gradually disappearing, while free TV has undergone a significant crisis as a result of the dramatic drop in advertising income, especially for private channels, and the trials and tribulations of state television that included a period of closure from 2013 to 2015.⁶⁹ Despite the apparent resilience of the sector, therefore, a number of factors are challenging its stability, and it remains to be seen what its future direction will be.

⁶⁹ On the closure and re-opening of the Greek State Television, ERT, see: <http://www.bbc.co.uk/news/world-europe-22879269> and <http://www.bbc.co.uk/news/world-europe-33090373>. Both accessed on 14 August 2016.

Conclusion

The above discussion has illustrated that while the formal distribution sector in Greece has been affected by the reduction of income that resulted from the drop of the theatrical box office from 2009 to 2014 and the shrinking of the ancillary markets, despite some localized changes (such as the closure of the distribution arm of Village, or the breakup of Odeon and Rosebud), the overall structure of the industry and the majority of its working practices have remained the same. Like before the crisis, the distribution companies that represent US studios continue to dominate the market, even if there were some changes in the licensing deals, with two new players (Feelgood and Tanweer) entering the market – albeit headed by experienced executives. Furthermore, the years since the crisis have also seen a number of small start-ups, suggesting that despite the strains in the system, there are still opportunities available both for the large and the smaller companies. The lack of access to these companies' financial data, however, obscures their real position, but indications suggest that vertically integrated companies are the ones that struggle most.

Aside from the resilience of the overall structure of the industry, the distributors' working practices did not radically change either since the crisis. For example, the number of films acquired by each company and, by extension, the number of films released in cinemas (and available for ancillary exploitation) did not significantly alter in this period ranging to about 300 per year. A closer look to the number of films released theatrically suggests a drop in numbers in 2012, which was nonetheless

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followed by a steady increase.⁷⁰ Despite claims by many of my interviewees that such numbers are unsustainable, this steady and even upward pattern continues and can be attributed to a number of factors: the competitive conditions in which the companies function; some distributors' pre-existing commitments with sales agents; and even protectionist measures towards some films provided by the European Union. Indeed, the steadily high demand for new films has also meant that prices of acquisitions in this period did not significantly drop despite the reduced expected box office returns.

Another factor that has contributed to the apparent resilience of the sector is the digitization of all cinemas in Greece, which was completed in December 2014. Despite the fact that a large part of the bill was footed by distributors (via the Virtual Print Fee), the radical reduction in print costs, and the flexibility with which theatres can schedule different films at different slots during the day has increased the potential number of films theatrically released – even for a short run. However, while enabling certain films to find screening slots when they would not have any previously, such flexibility also means that - unless very popular – films rarely stay in cinemas for more than a week.

The broader landscape of film distribution in Greece has been significantly affected by the spreading of informal modes of online film viewing. While, as discussed above, it is very difficult to quantify such practices with any precision, their prevalence is undoubted as is indicated both by the data provided by Greece's key enforcement agency, and by anecdotal information. Harder still is to make the precise

⁷⁰ According to data from the Greek Film Centre, in 2010, 263 films were released; in 2011: 302; in 2012: 224; in 2013:272; in 2014: 286; and in 2015: 300.

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3 link between piracy and the box office drop of the early 2010s, but combined with the
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5 financial crisis that reduced disposable income, one can easily claim that
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7 technological changes and the resulting increased availability of films online have
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9 played a significant role.
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14 This mapping of film distribution in Greece since the financial crisis has shown the
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16 antagonistic terms of the symbiosis between the formal and informal networks in
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18 Greece, as well as the fact that residual practices dominate in the formal sector. To put
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20 it otherwise, change is slow and reluctantly embraced by distribution companies
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22 whose working practices have not visibly changed to engage with the new challenges.
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24 Whether the entry of the global giant Netflix into the Greek SVoD market will
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26 radically change the balance of power with local distributors, challenge their working
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28 practices, reduce the informal circulation of films in Greece and improve the users'
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30 viewing experience and content choice remains to be seen. That any such
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32 developments, however, will add further levels of tension and interaction between
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34 national and global players and interests is certain.
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