

JOHN HOPEWELL, CALLUM McLENNAN

San Sebastián Market Wrap, from Standouts, Big TV Plays, Consolidation, Tax Breaks Are King

Blessed by blowsy sun, two Conferences and a Co-Pro Forum which brought the highest caliber and number of U.S., European execs and Latin American producers ever seen in Festival history, San Sebastián rounded its final bend Friday after a packed, busy and upbeat event.

Below, eight takeaways, some 24 hours before Saturday night's closing gala and prize ceremony.

Women Rule Still

Coming into the Festival, many of the biggest buzz pictures were directed by women. Many now figure, according to a "El Diario Vasco" Spanish critics' poll, as Golden Shell frontrunners: Isabel Helguera's *Sultana's Dream*, Raven Jackson's *All Dirt Roads Taste of Salt*, Jaione Camborda's *The Rye Horn* and Tzu-Hui Peng and Ping-Wen Wang's *A Journey in Spring*.

New Talent

All of these four films are debuts or sophomore outings in a competition where ten of the sixteen titles are indeed first or second films. Standouts for "Variety" take in *Fingernails*, Christos Nikou's second feature – "calmly controlled, beautifully played," ran a review – and *Puan*, Maria Alché's second feature (though Benjamín Naishtat's fourth). There's "an enormous amount of fresh talent coming through, and those new voices for the most part don't come from the U.S.," CAA Media Finance's Roeg Sutherland said at San Sebastian's Creative Investors' Conference (CIC).

Business Tenor

Some big news was announced at San Sebastian. Some were major new films – Carla Simón's flamenco musical – or sales agents' pick-ups, from Latido, Film Factory and Filmax. Almost all the other deals, however, involved some kind of co-operation – The Mediapro Studio's buy up of Cimarrón, Beta Film's j.v. with Danny Goldman, or *Rondallas*, a Studiocanal-Ramón Campos co-pro. Consolidation is ripe in international, as companies seek to maintain growth momentum. Non-English language films still sell. In general, however, the pace of business announcements

looks to have slowed at least a notch after a gung-ho recent past.

What Sells?

Or maybe many of the types of movies which now sell on the open market place aren't always typical festival fare. What pre-sells? Sutherland asked at the CIC, running Sept. 27-28. Genre, event movies, animation, and especially Japanese animation, Goodfellas Vincent Maraval replied. "Uniqueness and originality, two said Jamison, mentioning *How to Have Sex*. "You can feel the market is shifting a little younger," she said. Goodfellas is driving into action movies, catnip for platforms, budgeted at a contained \$8 million-\$10 million, said Maraval.

Another Way Forward: Ambition

Sunday's Europe Conference delivered another answer: Scale and ambition. For Domingo Corral, at Movistar Plus+, "You need a least scale at local level, in order to face off with [global streaming companies] with such deep pockets." "Creating content for a larger than national market is not a question of science, it's a question of ambition," observed Beta Film's Jan Mojto. Lead produced by Pathé, *The Three Musketeers: D'Artagnan* notched up a worldwide box office of over €35 million (\$37.1 million). "If we want to rival Hollywood, we need to be more daring," read a message at its presentation.

Market Trends

How big companies can go is another question. A clutch of big plays are coming to the market at Mipcom, one, Movistar Plus+'s *La Mesías*, written-directed-produced by *Veneno* creators Los Javis. Netflix's *The Eternaut*, broken down by its producer Matías Mosteirín at the CIC, should bow next year. Their success, in branding, audiences and international distribution, will determine in part the extent of enthusiasm of their backers to continue to launch the big swings which characterised

the first phase of the Golden Age of TV. For the moment, *La Mesías* received a reception this Friday at San Sebastián which was little short of ecstatic at San Sebastian.

In Production, Tax Breaks Are King.

112 regions and countries are looking to lure productions with favorable legislative conditions. Through rebate, grant, or various other mechanisms. Naturally, producers of all stripes shop around. Olivia Sleiter of Fremantle spoke of how a change of tax credit of just 2% can jeopardize projects and that trust of an incentive and the government surrounding it are key. Spain is building that trust with many on stage at the European Conference struck by the speech of Spanish Vice-President Nadia Calviño who opened proceedings. She sounded a highly pro-AV tone "I have a bias here, the truth is that it is a sector that I admire, that I love, that I am very fond of, I am a film buff, a big fan." Later, the European Commission's Renate Nikolay described the arrangements in Spain as "best in class" for Europe. In reference to Calviño's earlier speech, Sleiter emphasised, "It's clear everybody here [Spain] believes in this industry. It's clear."

The Deals

20 of the best unveiled during San Sebastian, all "Variety" exclusives:

*In the biggest deal to drop this year, The Mediapro Studio, one of Europe's biggest independent production-distribution powerhouses, has acquired Cimarrón, the Uruguay, Argentina and Mexico-based production house and services company.

*Signalling her international ambitions, and a departure, *Alcarràs* director Carla Simón announced she will direct a flamenco musical, on the eve of receiving Spain's National Cinematography Award. María Zamora once more produces.

*France's Studiocanal, Ramón Campos' Mr. Fields, Bambu are pre-

pping *Rondallas*, by 'Spanish Alexander Payne' Daniel Sánchez Arévalo.

*Just days after Jan Mojto, head of German TV giant Beta Film, drilled down at San Sebastian on its ambitions to find partners "to create content for a larger than national market," Beta announced it is teaming with Danny Goldman to launch Omega Global Media, focusing on high-end English-language TV series.

**The Endless Trench* directors Aitor Arregi and Jon Garaño's new film 'Marco' has joined Film Factory's sales slate. Top Basque producers Irusoin and Moriarti Produksioak produce, as well as Atresmedia.

*Paris-based Luxbox has clinched first sales on competition frontrunner *Puan*, from Rojo's Benjamín Naishtat, *A Family Submerged*'s Alche, closing France (Condor), Spain (La Aventura Cine) and Brazil (Vitrine).

*Spain's Latido has pounced on sales rights to *La vida de Brianeitor*, a doc-feature on the star of *Championext*, from Alvaro Longoria (*Sancuary*), and potentially one of the biggest crowdpleasers at San Sebastián.

*Medialinvest, a new E.U. equity tool managed by the European Investment Fund, has made its first deal: An equity agreement with France's Logical Content Ventures, part of Logical Pictures. Deal is aimed at attracting more private-sector investors into Europe's film-TV.

*Also, the E.U.'s InvestEU CCS Guarantee has closed three debt financing agreements, with Spain's Cersa and Crea and Luxembourg-based The Archers. Four deals total value is €68.25 million (\$72.35 million), expected to leverage around €500 million (\$530 million) in new financing.

*Finland's and sales agent FilmSharks has dropped a trailer to *Snot & Splash*, arguably the hottest title at Locarno as the industry dries into family titles as resilient – and sellable – entertainment fare.

*Mexico's Katina Medina Mora, director of *Emily in Paris*, is teaming with Chile's Julio Rojas, creator of podcast phenom *Caso 63*, to direct

and co-write with Rojas' *Freeland*, a first love drama-thriller and near future science fiction for which Rojas is hailed as a master.

*The 'Reliably Superb' Alfredo Castro, Next Up in Pablo Larrain's *El Conde*, has boarded *Three Darks Nights*, from *White on White* director Theo Court.

*Miami and Madrid-based Onza has swooped on series *Allende*, *The Thousand Days*, with Castro, Latin America's go-to actor, playing Salvador Allende during the three years he governed in Chile. Sneak-peaked at San Sebastián, series is bound for Iberseries and Mipcom.

*Sundance winner Teresa Sánchez, and Rafaela Fuentes, stars of *Dos Estaciones*, are set for follow-up, *Warm Water*, Juan Pablo González and Ana Isabel Fernández directing.

*Prime Video Latin America has snapped up streaming rights to Katina Medina Mora's latest film *Heartbeat*, starring Oscar-nominated Marina de Távira (*Roma*). Animal de Luz produces.

*Filmax has snagged rights to "Truman" producer Impossible Films' LGBTQ+ dramedy *Norbert(a)*.

*Brazil's Raccord Produções, Chile's Araucaria Cine and France's Nord-Ouest Films will produce acclaimed Brazilian filmmaker Gabe Klinger's feature drama project *Okonomiyaki* topline celebrated Brazilian actor-helmer Leandra Leal (*A Wolf at the Door*).

**Alcarràs* producer Elastica Films is set to co-produce Marta Matute's *Yo no moriré de amor*, an ECAM Incubator project set up at *La Pecera*'s Solita Films.

*Meikincine has nabbed international sales on reflective San Sebastian rough-cut title *Maybe It's True What They Say About Us*, from Chile's Storyboard Media.

*Detailing a historical and fateful encounter between Vietnam's Ho Chi Minh and Chile's Salvador Allende, *The Meeting* is now in talks to be made as a first Chile-Vietnam co-production.

nature
COLLECTION
doppler

Porque queremos un futuro..
DE CINE

#wecare #dopplerparaguasdecine

SSIFF Donostia Zinemaldia
Festival de San Sebastián
International Film Festival