



WP3 – The institutional context of the EU film industry

Final report on the mapping and EU law of institutional models for the promotion of the EFI

PART A – T3.4: *Promotion of the EFI at the international level: Institutional and policy models across the EU Member States*

PART B – T3.5: *EU law and governance and the promotion of the EFI on the international scene*

PART C – T3.5: *Gender equality and women's representation in the audiovisual sector under the EU's Global Europe Instrument*

Project: Reviving, Boosting, Optimising and Transforming European Film Competitiveness - REBOOT

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PREFACE

PART A

Linked to Task 3.4/WP3, Part A examines comparatively public practices in eight European Union (EU) Member States, Denmark, Finland, France, Sweden, Poland, Italy, Spain, and Greece, regarding the institutional promotion of their national film industries and, by extension, of the broader European film industry (EFI) abroad. Specifically, it highlights the institutional efforts made to promote national film industries in countries outside the origin of a film, namely across EU Member States and beyond the bloc's borders. The principal objective of this report is to expand upon and update the findings of the 2006 study by the European Audiovisual Observatory (EAO)-Council of Europe (CoE) on public support for the international promotion of European films. The report addresses several key questions: How do EU Member States promote their national and, by extension, European films internationally? Which institutions are involved, what are their functions and objectives, and what mechanisms do they employ? How is funding distributed, and what specific forms of support are provided? The analysis of the eight countries confirms the assumption that, in parallel to the development of EU competences in the audiovisual/film sector, the Member States remain the main players in the international promotion of their respective film industries. The film diplomacy of the Member States is achieved through various public institutional mechanisms; through specific support systems anchored in their cultural, economic and diplomatic strategies; and through collaboration between the Member States on a bilateral, regional or international basis, in parallel with the European frameworks.

PART B

Part B forms part of T3.5 (EU law and governance and the promotion of the EFI on the international scene). It examines and assesses whether—and, if so, how—EU law and policies promote European audiovisual works and film beyond the borders of the EU. It does so by mapping the policies and instruments in place, identifying their characteristics, complementarities, enablers and limitations in enhancing the internationalisation of the European audiovisual industry. The analysis focuses in particular on agreements the EU has negotiated with third countries and regions concerning trade facilitation and cooperation in the audiovisual and film sectors. It also



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considers EU funding instruments supporting the audiovisual sector and external action in this field. Methodologically, the study draws on extensive desk research and the analysis of a range of primary and secondary sources, complemented by insights gathered through semi-structured interviews with EU officials and film stakeholders. Overall, the findings indicate that EU agreements with third countries, along with audiovisual cooperation and external funding tools, include various elements that can boost the positioning of European films worldwide, although the scope of these instruments varies. The analysis also suggests that considerable untapped potential remains and calls for a comprehensive internationalisation strategy that promotes the competitiveness of the European audiovisual sector while supporting cultural diversity.

PART C

Part C, which also forms part of T3.5, examines gender equality in the audiovisual sector through the EU's NDICI-Global Europe program. It reveals ongoing challenges women face in creative roles within the film industry and evaluates the EU's efforts to integrate gender equality into international cultural cooperation. Despite growing political focus, significant barriers persist, and global progress is uneven. The chapter calls for stronger, targeted support for women's leadership in cultural industries to advance gender equality and sustainable development in the region where Global Europe is present.



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PART A – T3.4: PROMOTION OF THE EFI AT THE INTERNATIONAL LEVEL: INSTITUTIONAL AND POLICY MODELS ACROSS THE EU MEMBER STATES

EXECUTIVE SUMMARY

The report examines comparative public practices in eight European Union (EU) Member States: Denmark, Finland, France, Sweden, Poland, Italy, Spain, and Greece, regarding the institutional promotion of their national film industries and, by extension, of the broader European film industry (EFI) abroad. Specifically, it highlights the institutional efforts made to promote national film industries in countries outside the origin of a film, namely across EU Member States and beyond the bloc's borders. The principal objective of this report is to expand upon and update the findings of the 2006 study by the European Audiovisual Observatory (EAO)-Council of Europe (CoE) on public support for the international promotion of European films ([Hoefert de Turégano, 2006](#)). In light of evolving policy frameworks, technological transformations, and shifts in global market dynamics, this report re-examines the role of public institutions in fostering international outreach of national/European film industries. The report tests the premise that, despite the EU's recent turn towards cultural diplomacy (or, to be more precise, cultural relations), EU Member States remain the main actors for the promotion of their respective film industries internationally through the establishment of funds and various support schemes. As such, the report addresses several key questions: How do EU Member States promote their national and, by extension, European films internationally? Which institutions are involved, what are their functions and objectives, and what mechanisms do they employ? How is funding distributed, and what specific forms of support are provided?

Indeed, the dynamics between national film industries, their international promotion and European policymaking have still not been closely examined ([Hoefert de Turégano, 2006](#)). This justifies a careful examination of the ways in which public authorities contribute to the promotion of national film industries abroad. This report aims to provide a current overview of the institutional promotion of the national film industry across EU Member States and abroad, as well as the various promotional means at different levels, national, regional, and European ones, almost two decades after the 2006 report of the EAO. Our sample of countries reflects the variety of the film-making systems under review in terms of film production, market size, competitive strength and levels of film policy development. The countries chosen are also different in terms of their support regimes for the film sector: countries with centralised and less-centralised support models; and federal



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states as opposed to unitary states, etc. Crucially, they include Western European countries which have in principle established film policies and Eastern European countries whose transition to democratic rule has been associated with processes of identity building.

Methodologically, an extensive desk research phase was conducted, drawing upon a range of more than 250 documents from scholarly literature, policy studies and official reports produced by local, national, regional, European and international authorities. This analytical phase served to contextualise the report within existing debates and institutional frameworks, as well as to inform the design of the interview guide; together, the desk research provided a comprehensive overview of the regulatory, economic and cultural dimensions relevant to the institutional promotion of national film industries abroad. In addition, the report valued the inclusion of a qualitative empirical phase, by conducting semi-structured interviews and focus groups – both in person and online, from September 2023 to November 2024 – with 72 participants including a diversified set of film professionals (producers, distributors, sales agents, etc), representatives from ministries, public film agencies and film industry associations.

Regarding its development, the report focuses on several key aspects. Firstly, it provides a short market overview on the eight countries under study and it analyses the objectives of promoting internationally the national film industries, exploring their institutional mechanisms and specificities. In addition, the report examines a diversified and extensive set of state-funded programmes and support schemes, as well as bilateral, regional, European and multilateral cooperative arrangements, which serve as key practices reflecting how the eight countries promote their national film industries both within the EU and internationally. In the last section, the report highlights the film promotion in the eight countries, in response to current policy context and technological transformations. This analysis is conducted through three lenses: the EU's growing influence in the coordination of film-audiovisual policies, the economic upheaval caused by the COVID-19 pandemic, and the reshaping of film production and distribution circuits by Video-on-Demand (VoD) platforms.

The analysis of the eight countries has confirmed the assumption that, in parallel to the development of EU competences in the audiovisual/film sector, the Member States remain the main players in the international promotion of their respective film industries. The film diplomacy of the Member States is achieved through various public institutional mechanisms; through specific support systems anchored in their cultural, economic and diplomatic strategies; and through



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collaboration between the Member States on a bilateral, regional or international basis, in parallel with the European frameworks.

France adopts a strategy aimed at consolidating its position as a global film power, advancing both cultural and economic objectives. This approach is closely aligned with the country's broader cultural diplomacy agenda and it reflects a deep-rooted commitment to the promotion of cultural diversity and artistic freedom. France's international film promotion strategy is further reinforced by a comprehensive framework of bilateral co-production agreements, targeted support schemes and multilateral aids, i.e. with the Organisation internationale de la Francophonie (OIF), operating both within the EU and abroad. These mechanisms facilitate cross-border collaboration while enhancing the visibility and circulation of French, and European, audiovisual works. This contributes to the country's influence in international cultural and economic arenas. Besides, France differs from its European counterparts, thanks to an innovative institutional arrangement that combines substantial public funding with a joint governance mechanism that relies on the complementary functions of two key entities: the diplomatic efforts of audiovisual attachés and the sector-specific expertise of Unifrance. This dual framework enhances the strategic reach of French cinema abroad. It combines film diplomacy with targeted promotional capabilities, thereby offering France a comparatively greater capacity for international influence and visibility. Besides, France plays a pivotal role in shaping EU-level initiatives for international film promotion. At the same time, the strong French engagement is tempered by concerns that more extensive EU-level actions could undermine the distinctive features of the French film industry and the dynamic institutional model that underpins it.

Spain's approach is both ambitious and complex – not only because there is a multilevel structure of policies and institutions dealing with the promotion of the Spanish film industry but also because support is multi-dimensional: it usually combines a range of objectives not always easy to fulfill and reconcile; notably economic, diplomatic, cultural and linguistic. This is particularly evident in the country's decentralised structure in which all Autonomous Communities have some sort of cultural aid scheme comprising the audiovisual sector, though they vary in scale and sophistication. Different institutions contribute to shaping and supporting these efforts - public entities involved in international cooperation and cultural diplomacy, and private entities, driven by professional and market-oriented objectives. While both state and sub-state initiatives exist, many initiatives rely on the complementary support of EU funding mechanisms. Regarding the strategic dimension of international reach, the main focus seems to be in Europe and Latin America, but there is



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increasing interest in strengthening ties with Asia as well. Streaming services also emerged as a crucial component in expanding the global presence of Spanish cinema, representing a significant opportunity to enhance global reach but also presenting challenges, particularly in terms of visibility for non-mainstream European content.

The Italian cinematographic scene has witnessed a slow-paced yet significant transformation over the last two decades. Following its stagnation in the early 2000s (de Turégano, 2006), the Italian film industry (IFI) underwent an overhaul from institutional, economic, and legal perspectives, resulting in the revamp of the national infrastructure for producing, distributing, and exhibiting Italian productions. This transformation began with the adoption of the Cinema Law/Legge Cinema in 2016, which was the first legislative intervention by the Italian State into the IFI, and it has paved the way for a wave of legislative reforms that modernised the institutional and economic framework governing the operationalisation of the IFI by equipping key public institutions with the budget to invest in the development of the Italian audiovisual sector. Our analysis reveals that Italy, while incentivising film production, particularly through tax credits, regional funds, and the activities of Cinecittà and the Italian Trade Agency, follows a strategy that is guided by national cultural and economic priorities and objectives, which minimizes institutional understandings and strategic integration of the European dimension within Italy's film promotion policy. Consequently, Italy has not yet fully leveraged the potential of the European framework for film co-productions, film professionals' mobility, and film diplomacy. There are some notable examples of important partnerships with both European producers (e.g., France) and non-European producers (e.g., Latin America, the United States). Besides, the scarcity of publicly accessible qualitative and quantitative data impedes the analysis of the current role of the EU and the VoD platforms on the internationalisation of the IFI.

Greece showcases an evolving and renewed film policy, primarily spearheaded by the Ministry of Culture. This policy functions not only as a means of cultural expression and identity preservation but also as a strategic investment in the cultural economy. A key component of this policy is the integration of Greek film promotion into cultural diplomacy. Film production, education, and film archival efforts are positioned as tools to foster intercultural dialogue and safeguard national heritage. At the institutional level, the newly established Hellenic Film and Audiovisual Center – Creative Greece (Law 5105/2024) under the Ministry of Culture serves as the central hub for coordinating and promoting national cinematography. In addition to state-driven efforts, civil society organizations play an increasingly active role in national film promotion, often working in synergy



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with European programs such as Creative Europe/MEDIA. These partnerships enhance Greece's integration into the broader European audiovisual landscape. However, there is a noticeable gap in the engagement of VoD platforms operating within Greece. Their relatively limited involvement in promoting Greek film content internationally highlights a need for stronger collaboration and strategic partnerships. Addressing this gap could significantly amplify the global reach of Greek cinema.

Poland aims to expand and strengthen the position of the Polish film industry in Europe and globally, as reflected by being ranked eighth among the most profitable film markets in Europe (IBISWorld, 2024). This aligns with raising the economic, social, and cultural potential within the framework of developing an economy based on creative industries, which primarily include the film sector. Poland's strategy in the area of international film promotion is mainly based on the activities of the state entity, the Polish Film Institute. Among its main operational programs, the Institute has a separate program dedicated to the international promotion of films. Another entity actively promoting Polish film culture is the Adam Mickiewicz Institute, which engages in various initiatives and programs to disseminate and promote, among other things, Polish films internationally. Other entities with an impact on the international promotion of Polish films are the National Film Archive - Audiovisual Institute and the National Cultural Center. All the above entities operate under the auspices of the Polish Ministry of Culture and National Heritage. Besides, the regional film funds support the promotion of films produced in collaboration with them. Poland has also recognised the potential of the fast-growing VoD sector, engaging in various forms of international cooperation with the most prominent players in the streaming services industry. The investment in the VoD sector is evidenced by the opening of Netflix's headquarters for Central and Eastern Europe in Poland in 2022.

In Finland, the Finnish Film Foundation plays a key role in the film industry, acting as the primary promoter of film with the greatest resources. It promotes films that it has supported in their production. Other organisations also operate alongside it, complementing its activities. Funding for all these actors mainly comes from the state, particularly the Ministry of Education and Culture. While promoting the economic growth of the film industry is a priority, there is also an emphasis on the broader development of the sector, particularly with regard to cultural diversity, equality, and sustainability. Cultural exports — the promotion of film culture beyond an economic perspective — and attracting productions to Finland are also essential for the film industry in a small country. Finland has long promoted the visibility of its films by cooperating extensively with other Nordic



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countries through the umbrella organisation The Five Nordics and the Nordic Film & TV Fund (NFTVF). The investment obligation for on-demand programme services has not yet been implemented in Finland, but the sector hopes that it will be introduced soon. According to a recent report, introducing the obligation would improve access to films from small linguistic and cultural areas.

Denmark takes a holistic approach to its domestic film industry, supporting it across the value chain with a lively ecosystem of institutions, which is – however – not closely aligned with the country's broader diplomatic agenda. Rather, Danish film policy can be described as a film-centred strategy through which relevant stakeholders (notably, the Danish Film Institute) support the production of films that are both of high artistic quality and seen as potentially successful in terms of audience figures, which they subsequently promote. This is accompanied by broader efforts to enhance the internationalisation of the Danish film industry – both through the work of the Danish Cultural Institute and in the promotional efforts of Creative Denmark. Moreover, co-productions play a key role in the Danish film industry. Linked to this issue, Denmark has been an active contributor to the emergence of an ad hoc transnational Nordic film network, which coalesces around the Five Nordics and the NFTVF. Finally, the organised and successful efforts of professional organisations to advocate for increased rights and fairer remuneration vis-à-vis international streamers that operate in the country reflect both the strong ecosystem of the Danish film industry and its international influence as a film powerhouse.

Finally, Sweden takes a collaborative and multistakeholder approach to film policy. Its domestic industry is characterised by a focus on co-productions as well as strong relations between national and sub-state actors and between Ministries: production support is primarily provided by the Swedish Film Institute (SFI) with financial backing from the Ministry of Culture, and the SFI's own promotion efforts are accompanied and reinforced by the Swedish Institute and thus, indirectly, by the Ministry of Foreign Affairs. Therefore, Swedish support for film promotion is a continuum between its domestic and foreign action. In what is highly particular to this case study, Swedish film policy reflects both a significant concern with audience preferences and the country's mainstreaming of diversity and inclusion policies, with a particular focus on gender equality. This is reflected in existing production funding schemes and is recognised as important in the international image of Sweden that the SFI's promotional efforts aim to showcase. Like Denmark, Sweden is an active member of the Five Nordics and the NFTVF.



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LIST OF ABBREVIATIONS AND ACRONYMS

A4D	Alliance4Development
AC/E	Acción Cultural Española [Spanish Cultural Action]
ACM	Aide aux Cinémas du Monde [World Cinema Aid]
ACMD	Aide aux Cinémas du Monde – Distribution [World cinema aid – distribution]
ADEF	Association des Exportateurs de Films Français [French Association of Film Exporters]
AECID	Agencia Española Cooperación Internacional y Desarrollo [Spanish Agency for International Development Cooperation]
AF	Alliances Françaises [French Alliances]
AGADIC	Axencia Galega das Industrias Culturais [The Galician Agency for Cultural Industries]
AGCM	Autorità garante della concorrenza e del mercato [Italian Competition Authority]
AmChamSpain	American Chamber of Commerce in Spain
ANICA	Associazione nazionale industrie cinematografiche audiovisive e digitale [National Association of Cinematographic, Audiovisual and Digital Industries]
APA	Associazione Produttori Audiovisivi [Association of Audiovisual Producers]
APE	Associazione Produttori Esecutivi [Association of Executive Producers and Production Service Companies]
APFI	Audiovisual Producers Finland
AR	Augmented reality
ASIFA Hellas	Hellenic Animation Association
AVMSD	Audiovisual Media Services Directive
BI:CCI	BI Centre for Creative Industries
Red CAU	Red Clústeres Audiovisuales de España [Spanish Audiovisual Clusters Network]



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CCE	Centros Culturales de España en el exterior [Spanish Foreign Cultural Centres]
CCI's	Creative Cultural Industries
CDCE	Convention on the Protection and Promotion on the Diversity of Cultural Expressions
CEPI	European Audiovisual Production Association
CMO	Collective Management Organisation
CNC	Centre National du Cinéma et de l'Image Animée [National Cinema and Animated Image Centre]
CNFC	Coordinamento Nazionale delle Film Commission [National Coordination of Film Commissions]
COCO-I	Aide à la co-écriture de coproductions internationales [Support for International Co-Writing of Co-productions]
CoE	Council of Europe
CSC	Centro Sperimentale di Cinematografia [Experimental Centre of Cinematography]
DAEI	Direction des affaires européennes et internationales [Directorate for European and International Affairs]
DFI	Det Danske Filminstitut [Danish Film Institute]
DGCA	Direzione Generale Cinema e Audiovisivo [General Directorate of Cinema and Audiovisual Works]
DR	Danmarks Radio
EAO	European Audiovisual Observatory
EAVE	European Audiovisual Entrepreneurs
ECL	Extended Collective Licensing
EFAD	European Film Agency Directors Association
EFDF	European Film Distribution Fund
EFFE	Europe for Festivals, Festivals for Europe



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EFI	European Film Industry
EFM	European Film Market
EFP	European Film Promotion
EFTA	European Free Trade Area
EITB	Euskal Irrati Telebista [Basque Radio Television]
EKOME	Greek National Centre of Audiovisual Media and Communication
ENCATC	European Network of Cultural Administration Training Centres
ERT	Ellinikí Radiofonía Tileóراس [Hellenic Broadcasting Corporation]
ESFUF	European Solidarity Fund for Ukrainian Films
EU	European Union
FCP	Film Commission Poland
FERA	Federation of European Screen Directors
FCR	Fondazione Cinema per Roma [Cinema for Rome Foundation]
FFF	Finnish Film Foundation
FINA	National Film Archive - Audiovisual Institute [Filmoteka Narodowa - Instytut Audiowizualny]
FSC	Fonds Sud Cinéma [South Cinema Fund]
GATS	General Agreement on Trade in Services
GNT0	Greek National Tourism Organisation
GFC	Greek Film Centre
H.F.A.C. -- Creative Greece SA	Hellenic Film and Audiovisual Centre - Creative Greece SA
HFC	Hellenic Foundation for Culture
IAM	Instytut Adama Mickiewicza [Adam Mickiewicz Institute]
ICAA	Instituto de la Cinematografía y de las Artes Audiovisuales [Spanish Institute of Cinematography and Audiovisual Arts]



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ICE Agency	Agenzia per la promozione all'estero e l'internazionalizzazione delle imprese italiane [Agency of the Promotion Abroad and Internationalization of Italian Companies]
ICEC	Institut Català de les Empreses Culturals [Catalan Institute for Cultural Enterprises]
ICEX	España Exportaciones y Inversiones [Spain Trade and Investment]
ICICP	International Circulation of Italian Cinema Project
IFC	Italian Film Commissions
IFE	Italian Film Export
IFI	Italian Film Industry
IVC	Institut Valencià de Cultura [Valencian Institute for Culture]
KIPA	Krajowa Izba Producentów Audiowizualnych [National Chamber of Audiovisual Producers]
KRRiT	Krajowa Rada Radiofonii i Telewizji [National Broadcasting Council of Poland]
MKiDN	Ministerstwo Kultury i Dziedzictwa Narodowego [The Ministry of Culture and National Heritage]
MIA	Mercato Internazionale Audiovisivo [International Audiovisual Market]
MiAECI	Ministero degli Affari Esteri e della Cooperazione Internazionale [The Ministry of Foreign Affairs and International Cooperation]
MiC	Ministero della Cultura [Italian Ministry of Culture]
MiMII	Ministero delle Imprese e del Made in Italy [The Ministry of Enterprise and the Made in Italy]
MiNi-MiNo	Kortfilmssatsning för nationella minoritetsspråk [Short film support scheme for minority languages]
MoFA	French Ministry of Foreign and European Affairs
MS	Member States
NCK	Narodowe Centrum Kultury [National Cultural Centre]
NCKF	Narodowe Centrum Kultury Filmowej [National Centre for Film Culture]



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NCRTV	Greek National Council for Radio and Television
NGEU	Next Generation EU
NINA	Polish National Film Archive and the National Audiovisual Institute
OECD	Organisation for Economic Co-operation and Development
OIF	Organisation Internationale de la Francophonie [International Organisation of La Francophonie]
OTTs	Over-the-Top (Digital Platforms)
PICE	Programa AC/E para la Internacionalización de la Cultura Española [AC/E Programme for the Internationalisation of Spanish Culture]
PISF	Polski Instytut Sztuki Filmowej [Polish Film Institute]
PNRR	Piano nazionale di ripresa e resilienza [National Recovery and Resilience Plan]
PRD	Producent Rettigheder Denmark [Producer Rights Denmark]
R&D	Research and development
RRF	Recovery and Resilience Facility
SAPOE	Audiovisual Producers' Association of Greece
SFI	Svenska Filminstitutet [Swedish Film Institute]
SFP	Stowarzyszenie Filmowców Polskich [Polish Filmmakers Association]
SI	Svenska Institutet [Swedish Institute]
SMEs	Small- and Medium-sized Enterprises
SVoD	Subscription Video-on-Demand
TIFF	Thessaloniki International Film Festival
TOCS	TV and Online Content Support
TRIP	Tax Rebate for International Production
VoD	Video-on-Demand
VR	Virtual Reality



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XR	Extended Reality
WTO	World Trade Organisation



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INTRODUCTION

The report aims to map the institutional architecture that enables the international promotion of the national film industry, focusing on key policies and incentives in a diverse set of EU Member States. The report examines comparative public practices in eight European Union (EU) Member States: Denmark, Finland, France, Sweden, Poland, Italy, Spain, and Greece, regarding the institutional promotion of their national film industries and, by extension, of the broader European film industry (EFI) abroad. Specifically, it highlights the institutional efforts made to promote national film industries in countries outside the origin of a film, namely across EU Member States and beyond the bloc's borders. The principal objective of this report is to expand upon and update the findings of the 2006 study by the European Audiovisual Observatory (EAO)-Council of Europe (CoE) on public support for the international promotion of European films ([Hoefert de Turégano, 2006](#)). In light of evolving policy frameworks, technological transformations, and shifts in global market dynamics, this report re-examines the role of public institutions in fostering international outreach of national/European film industries. The aim is to identify key practices, gaps, and opportunities.

By offering a current mapping of the institutional landscape, this report seeks to yield insights into the current strategies employed by EU Member States to enhance the global reach of their film industries. It addresses several key questions: How do EU Member States promote their national and, by extension, European films internationally? Which institutions are involved, what are their functions and objectives, and what mechanisms do they employ? How is funding distributed, and what specific forms of support are provided?

The report tests the premise that, despite the EU's recent turn towards cultural diplomacy (or, to be more precise, cultural relations), EU Member States remain the main actors for the promotion of their respective film industries internationally through the establishment of funds and various support schemes. At the theoretical level, this report takes place within the field of cultural diplomacy. To clarify what is at stake, it is important to stress that cultural diplomacy shares similarities with public diplomacy and with cultural relations, though they all differ in their approach and objectives. Unlike traditional diplomacy, public diplomacy involves direct communication between governments and foreign publics (Gilboa, 2008). Cultural diplomacy uses culture as an indirect means of influence, avoiding overt political messaging (Ang et al., 2015) in support of broader efforts by states to achieve their objectives. Some scholars even consider cultural diplomacy a subset of public diplomacy because of their shared goals of influence (Gilboa, 2008).



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In contrast, cultural relations, as originally understood, emerge organically from civil societies and may occur independently of state intervention (Rawnsley, 2021).

Besides, cultural diplomacy is closely linked to the soft power concept as developed by Joseph Nye (1990). This concept refers to a country's ability to influence others through culture and ideas rather than through military or economic coercion (Vlassis, 2016b; Kessler, 2020; Ang et al., 2015). Central to this approach is the notion of attracting foreign audiences through culture and values, although the line between cultural diplomacy and propaganda can sometimes become blurred (Kessler, 2020, Dâmaso, 2025).

Film diplomacy remains hard to define with scholarly accuracy because there is no academic consensus on the actors involved in its design and implementation. Some scholars limit cultural diplomacy, and consequently film diplomacy, to state-level foreign policy actors; others include sub-national, international, and civil society organisations (Goff, 2013; Kessler, 2020; Vlassis, 2020). The disconnect between academic thinking and empirical work in this field is reinforced and demonstrated by the fact that international cultural relations, and, therefore, film policies implemented by the EU in this context, are by definition multi-level. If the actors of international cultural relations are multiple, and if film can be used to support this paradigm of cultural diplomacy, then of course, the latter is implemented by multiple actors. National institutional practices contributing to the promotion of the national film industry internationally support, implicitly or explicitly, the film diplomacy of their state. Therefore, we posit that they can be considered as a subset of cultural diplomacy. It has long been established that film is a medium that can convey narratives, challenge (or diffuse) stereotypes, and help shape perceptions (Goff, 2013; Kessler, 2020). Film diplomacy, therefore, pursues several objectives, including shaping national image and exerting influence in areas beyond culture, such as the economy (Goff, 2013). It contributes to constructing and projecting a country's image abroad through nation branding strategies to shape international perceptions thereof (Gilboa, 2008; Henze & Wolfram, 2014). Hollywood cinema and its role in disseminating US narratives on a global scale, exemplifies this framing aspect (Amini & Ramezani, 2022; Kessler, 2020).

Furthermore, the film industry is a strategic sector that drives trade, foreign investment and the broader development of creative industries (Lombard, 2022), making film diplomacy a potential lever for international economic development. Finally, film can contribute to building connections between people with the aim of promoting mutual understanding and dialogue among nations



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(Goff, 2013; Henze & Wolfram, 2014). This third diplomatic goal is, in theory, at the heart of the EU's film policy, which is framed by the EU's Strategy for International Cultural Relations ([European Parliament et al., 2017](#)).

The empirical analysis developed in the report addresses several gaps in the literature. As is well known, public policy in Europe has historically played a central role in shaping the film and audiovisual industries as well as the broader media sector (De Vinck, 2014). This involvement includes financial support, market regulation, the governance of intellectual property rights, and a range of regulatory and supportive measures aimed at safeguarding and promoting national and European film industries (Pauwels, 2014). These public interventions have been integral to audiovisual policy frameworks at local, national, regional and European levels (Psychogiopoulou, 2015; Calligaro & Vlassis, 2017). However, the dynamics between national film industries, their international promotion and European policymaking have still not been closely examined ([Hoefert de Turégano, 2006](#)). This justifies a careful examination of the ways in which public authorities contribute to the promotion of national film industries abroad. In this sense, this report aims to provide a current overview of the institutional promotion of the national film industry across EU Member States and abroad, as well as the various promotional means at different levels: national, regional, and European, almost two decades after the 2006 report of the EAO on public support for the international promotion of European films ([Hoefert de Turégano, 2006](#)).

Our sample of countries reflects the variety of the film-making systems under review in terms of film production, market size, competitive strength and levels of film policy development (see Figures [in section 1 on Market Overview](#)). The countries chosen are also different in terms of their support regimes for the film sector: countries with centralised and less-centralised support models; and federal states as opposed to unitary states, etc. Crucially, they include Western European countries which have in principle established film policies and Eastern European countries whose transition to democratic rule has been associated with processes of identity building. They also cover countries that have fiercely fought for the protection of cultural diversity and countries that had to substantially cut back their film support policies during the EU's economic and financial crisis.

Methodologically, an extensive desk research phase was conducted, drawing upon a range of scholarly literature, policy reports and official documents produced by local, national, regional, European and international authorities. This analytical phase served to contextualise the study



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within existing debates and institutional frameworks, as well as to inform the design of the interview guide. The reviewed materials included more than 250 documents from peer-reviewed journal articles, grey literature, strategic policy documents and evaluative reports: together, they provided a comprehensive overview of the regulatory, economic and cultural dimensions relevant to the institutional promotion of national film industries abroad.

In addition, the report valued the inclusion of a qualitative empirical phase, by conducting semi-structured interviews and focus groups, - both in person and online, from September 2023 to November 2024 -, with 72 participants including a diversified set of film professionals (producers, distributors, sales agents, etc), representatives from ministries, public film agencies and film industry associations across the eight EU Member States under study ([see Annex I](#)). The interviews lasted between 45 and 90 minutes and were digitally recorded with permission. Interviewees were emailed or given access to participant information sheets and informed consent forms beforehand. To ensure openness and confidentiality, all participants were anonymised, enabling them to share their views more freely. The research results represent a composite of views, as expressed through in-depth interviews on the promotion of eight national film industries abroad. All interview excerpts cited in this study were translated into English by the authors themselves.

Regarding its development, the report focuses on several key aspects. Firstly, it provides a short market overview on the eight countries under study and it analyses the objectives of promoting the national film industries, exploring their institutional mechanisms and specificities. In addition, the report examines a diversified and extensive set of state-funded programmes and support schemes, as well as bilateral, regional, European and multilateral cooperative arrangements, which serve as key practices reflecting how the eight countries promote their national film industries both within the EU and internationally.

In the last section, the report highlights the film promotion in the eight countries, in response to current policy context and technological transformations. This analysis is conducted through three lenses. First, it considers the role of the EU in international film promotion, which allows for an understanding of how EU action has been articulated (or not) with national film diplomacy efforts, and how it has been perceived by national public authorities and other involved actors. Next, the impact of the COVID-19 pandemic on the audiovisual sector ([see section 1 on Market Overview](#)) is discussed to analyse the national responses to the pandemic and the film industry's resilience.



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Finally, the report explores how various national stakeholders approach and relate to Video-on-Demand (VoD) platforms: it examines the international promotion of the national and European film industry (EFI) in light of the evolving technological context in which it is embedded.

1. MARKET OVERVIEW

This section provides an overview of key indicators of the European film market (EFM) from 2012 to 2023 with a focus on the eight case study countries selected: France, Spain, Italy, Greece, Poland, Finland, Denmark, and Sweden. It includes data on the number of feature films produced and total cinema admissions by country. Particular attention is given to the national market share of domestic films in each case study. These indicators help assess the performance of domestic productions within their respective markets. In addition, the section presents individual tables listing the top 15 national films by admissions for each of the eight countries, including additional data on awards, nominations, IMDB number of ratings, as well as gender's film director. The data comes from the Focus-World Film Market Trends Reports ([European Audiovisual Observatory, 2013-2024](#)) and IMDB database. Overall, these tables incorporate a broad set of contextual and performance-related variables, enabling an assessment of the diversity among the film-making systems in the eight countries studied. They provide insight into key dimensions such as film production, film market size, and competitive strength. Taken together, these indicators form an initial foundation for the following cross-country comparison in the sections 2, 3 and 4 and help to identify distinctive features across the eight European film markets.



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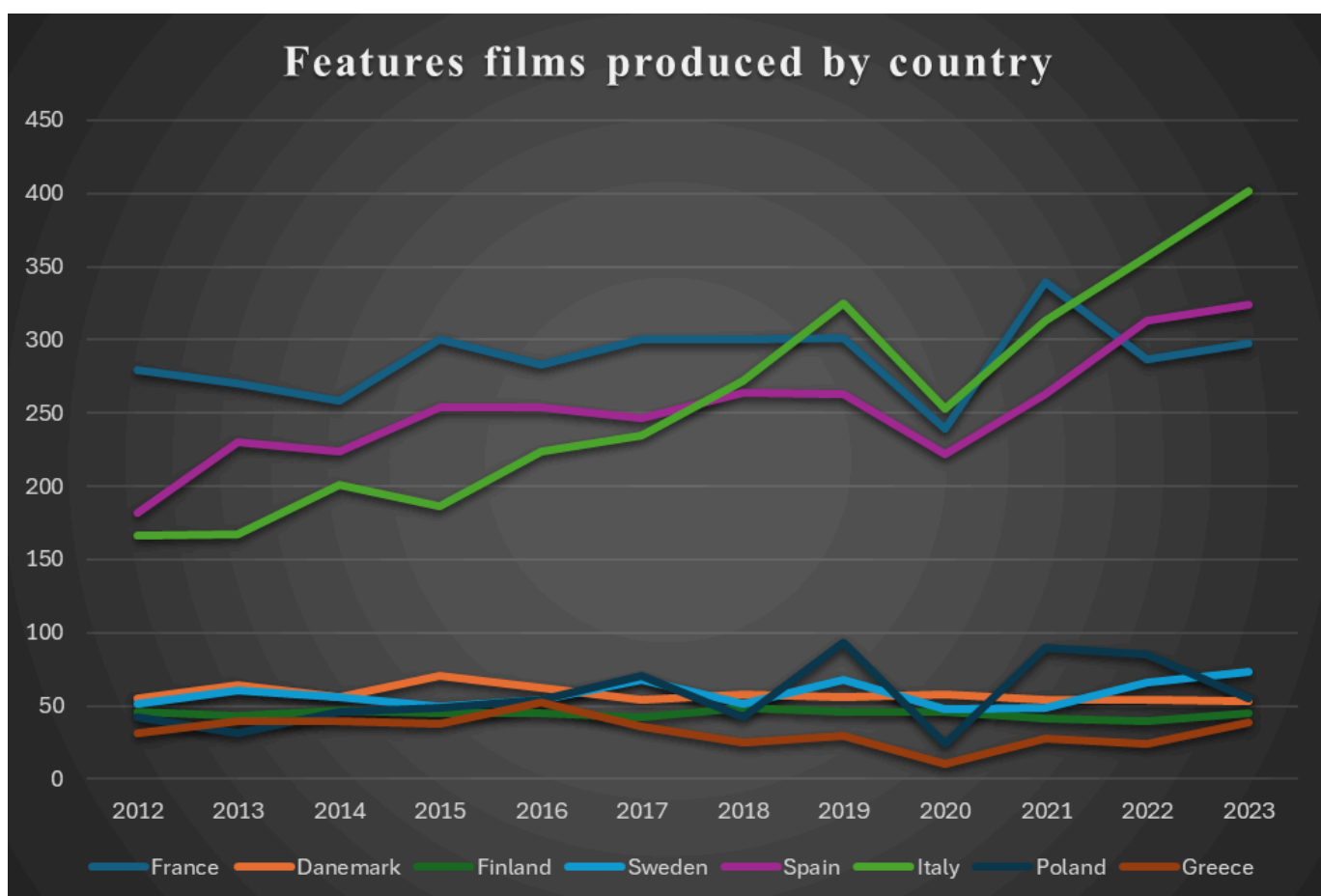


Figure 1 - Comparison of feature films produced by country

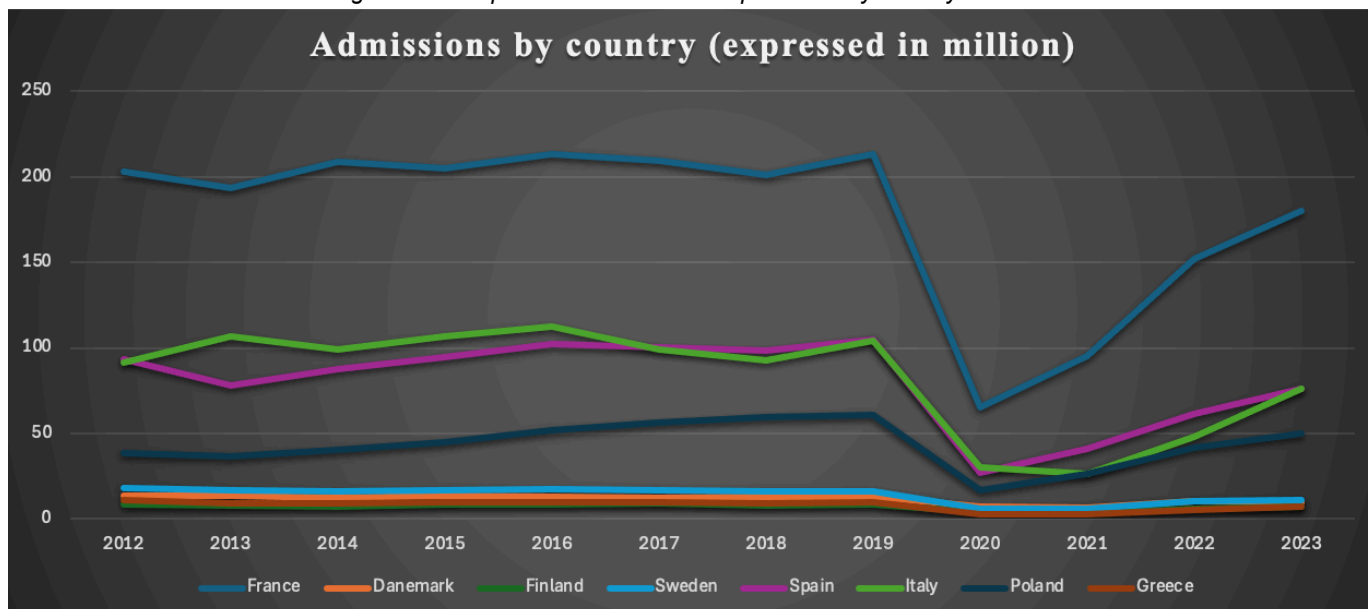


Figure 2 - Comparison of admissions by country



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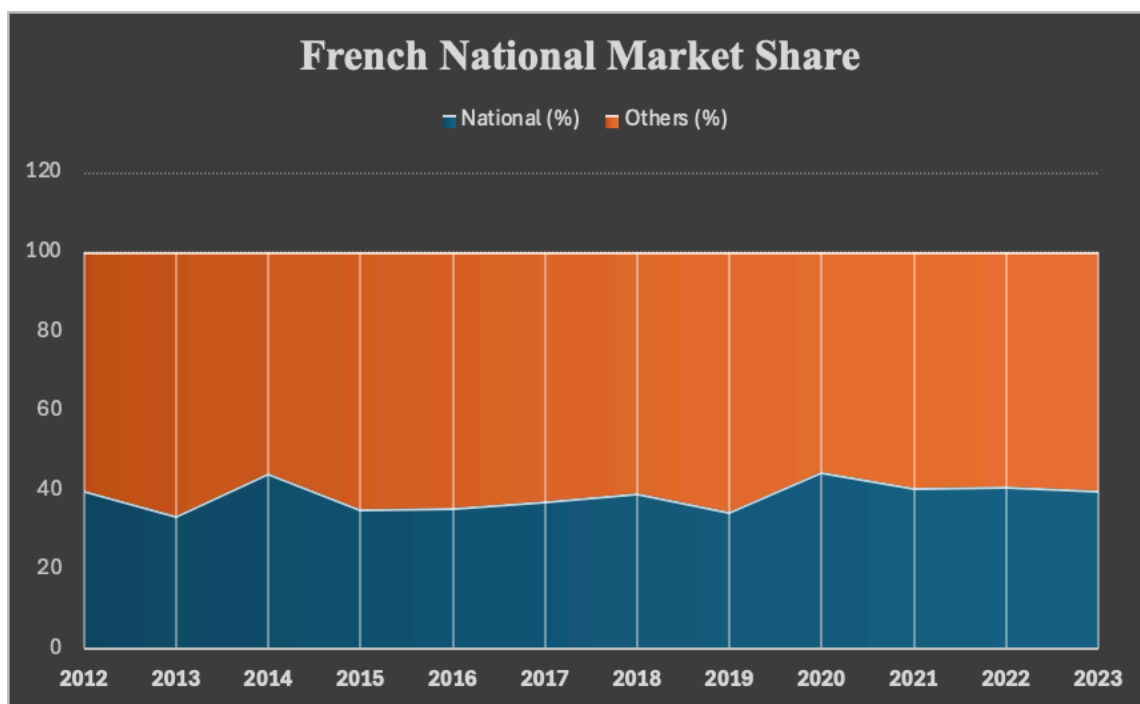


Figure 3 - French National Market Share

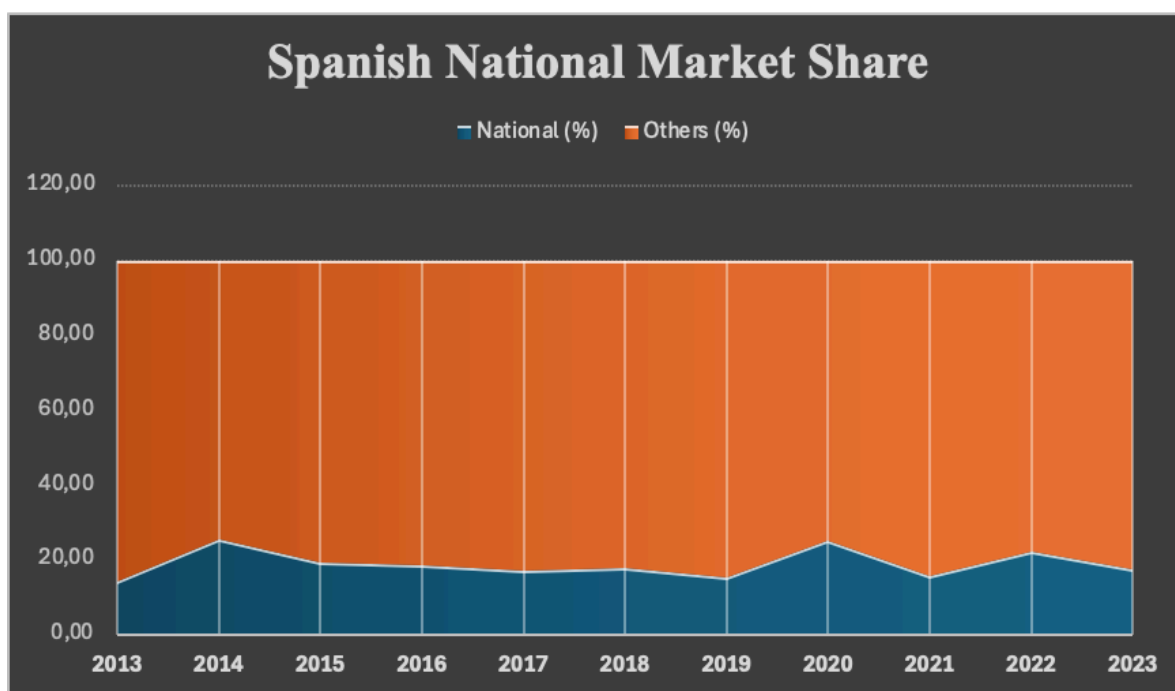


Figure 4 - Spanish National Market Share



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Figure 5 - Italian National Market Share

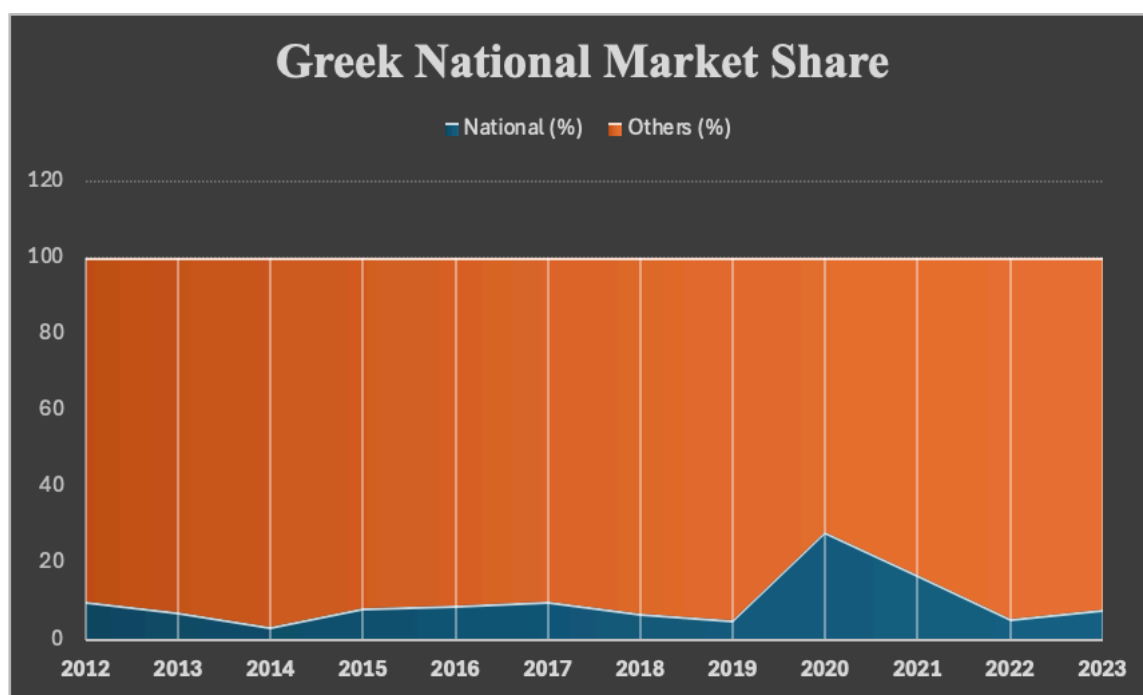


Figure 6 - Greek National Market Share



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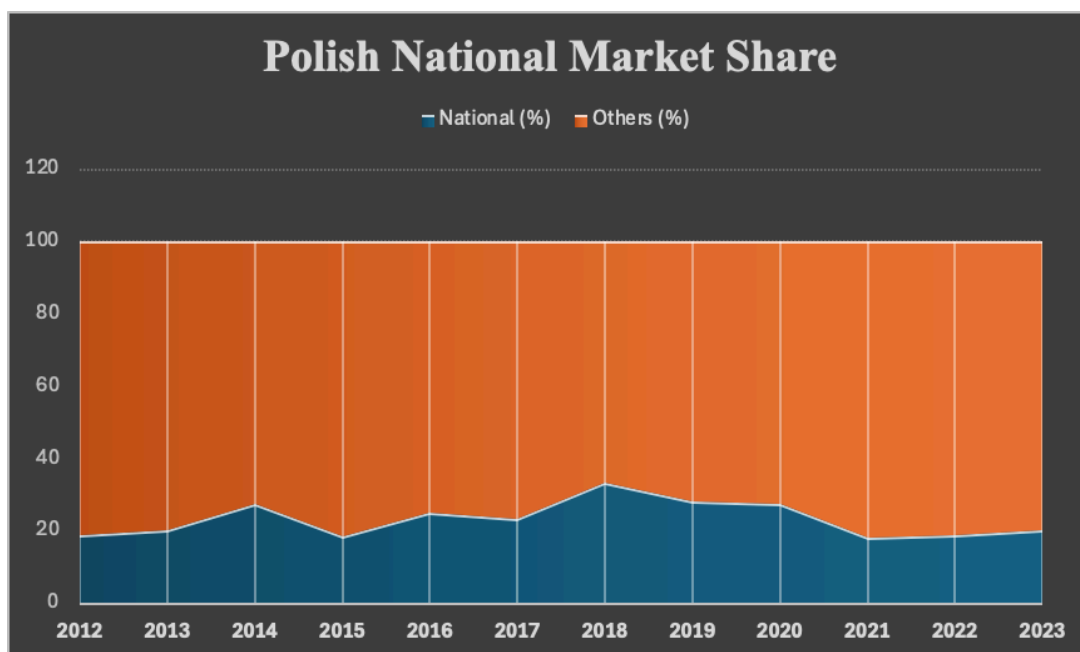


Figure 7 - Polish National Market Share

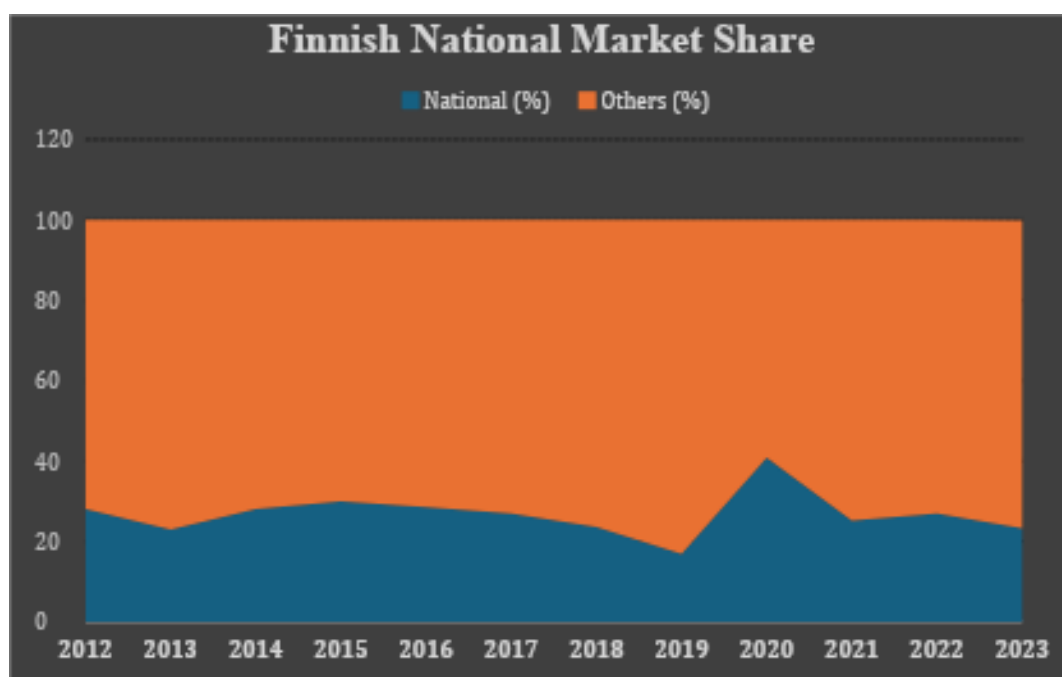


Figure 8 - Finnish National Market Share



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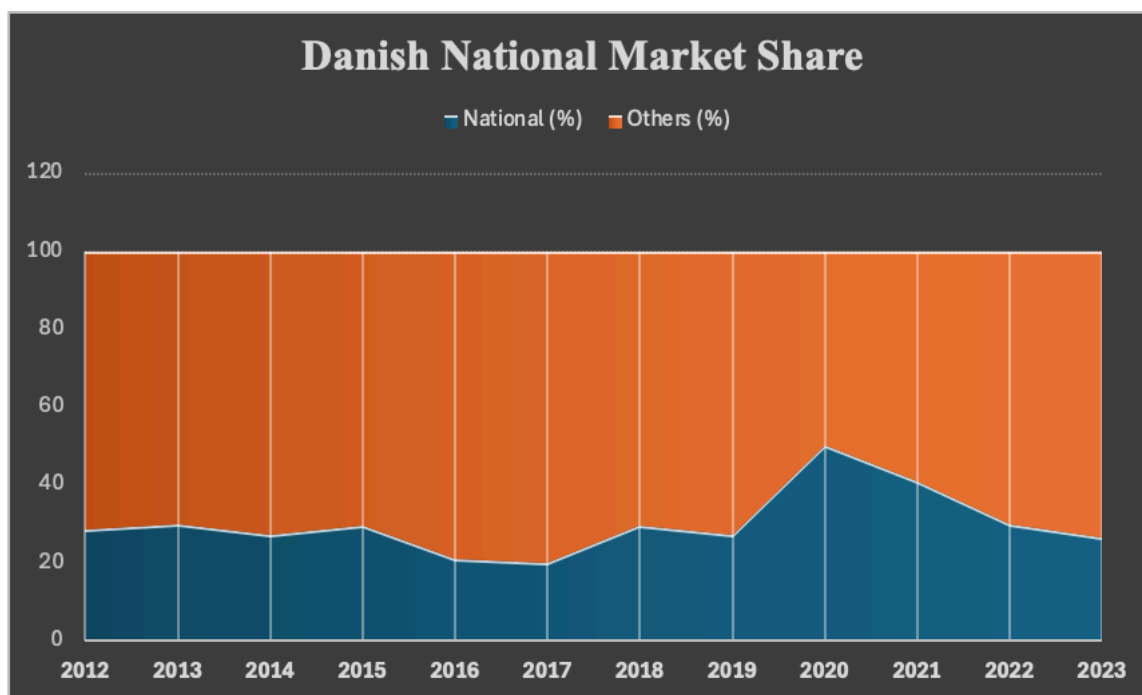


Figure 9 - Danish National Market Share

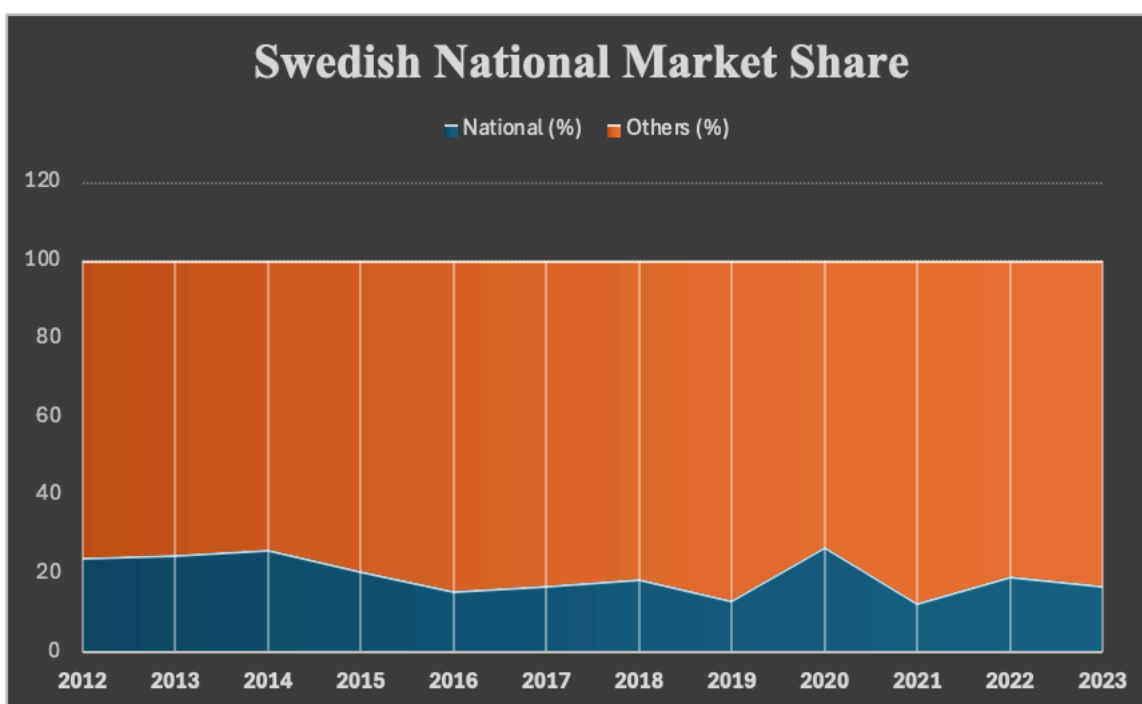


Figure 10 - Swedish National Market Share



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Top 15 - French Market (order by admissions for national movies (including maj co-prod))										
Original Title of the Film	Country of origin	Année	Director	Distributor	Admissions	Awards	Nominations	IMDB grade	IMDB number	Gender (director)
Qu'est-ce qu'on a fait au Bon Dieu ?	FR	2014	P. de Chauveron	UGC Distribution	12338574	2	2	7,0/10	45k	M
Qu'est-ce qu'on a encore fait au bon Dieu	FR	2019	P. de Chauveron	UGC Distribution	6714809	1	1	6,1/10	9,6k	M
Les Tuche 3 (The Magic Tuche)	FR	2018	Olivier Baroux	Pathé Distribution	5687100	1	0	4,6/10	1,4k	M
La ch'tite famille	FR/BE	2018	Dany Boon	Pathé Distribution	5626049	N/A	N/A	5,7/10	4,5k	M
Supercondriaque (Superchondriac)	FR/BE	2014	Dany Boon	Pathé Distribution	5268881	N/A	N/A	6,0/10	9,2k	M
Lucy	FR	2014	Luc Besson	EuropaCorp	5202954	1	12	6,4/10	533k	M
Astérix & Obélix: L'Empire du Milieu	FR	2023	Guillaume Canet	Pathé Distribution	4623977	0	4	5,1/10	12k	M
Les Tuche 2 - Le rêve américain	FR	2016	Olivier Baroux	Pathé Distribution	4619884	1	0	4,9/10	1,9k	M
Raid dingue (R.A.I.D. Special Unit)	FR/BE	2017	Dany Boon	Pathé Distribution	4570887	1	0	5,6/10	4,5k	M
Les nouvelles aventures d'Aladin	FR/BE	2015	Arthur Benzaquen	Pathé Distribution	4377528	N/A	N/A	4,8/10	2,7k	M
Alibi.com 2	FR	2023	Philippe Lacheau	StudioCanal	4258248	0	0	6,5/10	3,5k	M
Le grand bain (Sink or Swim)	FR/BE	2018	Gilles Lellouche	StudioCanal	4162550	5	16	6,9/10	12k	M
Valerian and the City of a Thousand Planets	FR/CN/...	2017	Luc Besson	EuropaCorp	4041205	0	11	6,4/10	196k	M
Les profs	FR	2013	P-F Martin-Laval	UGC Distribution	3955113	N/A	N/A	5,2/10	4k	M
Taxi 5	FR	2018	Franck Gastambide	EuropaCorp	3653933	1	2	4,6/10	11k	M

Figure 11 - Top 15 National Films: French Market

Top 15 - Spanish Market (order by admissions for national movies (including maj co-prod))										
Original Title	Country of Origin	Year	Director(s)	Distributor	Admissions	Awards	Nominations	IMDB rating	DB number of v	Gender (director)
Ocho apellidos vascos (Spanish Affair)	ES	2014	Emilio Martínez Lázaro	Snow Films	9.295.944	11	14	6,5/10	19k	M
Ocho Apellidos Catalanes (Spanish Affair 2)	ES	2015	Emilio Martínez Lázaro	Universal	5.134.311	2	3	5,3/10	7,9k	M
Un Monstro viene a verme (A Monster Calls)	ES/US	2016	Juan Antonio Bayona	UPI	4.582.925	39	57	7,4/10	94k	M
Perfectos desconocidos (Perfect Strangers)	ES/IT	2017	Alex de la Iglesia	UPI	4.478.105	2	15	6,9/10	15k	M
Campeones (Champions)	ES/MX	2018	Javier Fesser	UPI	3.250.299	13	31	7,2/10	12k	M
Tadeo Jones 2: El secreto del Rey Midas (Tad the Lost Explorer and the Secret of King Midas)	ES	2017	David Alonso, Enrique Gato	Paramount	3.173.873	4	1	6,2/10	4,1k	M
El Niño	ES	2014	Daniel Monzón	Hispano Foxfilms	2.677.696	13	42	6,4/10	6,5k	M
Padre no hay mas que uno 3 (Father There is Only One 3)	ES	2022	Santiago Segura	Sony	2.432.276	0	0	5,3/10	1,1k	M
One)	ES	2019	Santiago Segura	Sony	2.387.973	1	0	6-10	3,2k	M
Palmeras en la Nieve (Palm Trees in the Snow)	ES	2016	Fernando González Molina	Nostromo Pictures	1.973.431	5	11	7,3/10	13k	M
Campeonex (Championext)	ES	2023	Javier Fesser	Universal	1.945.125	2	5	6,1/10	1,2k	M
Atrapa la bandera (Capture the Flag)	ES	2015	Enrique Gato	Paramount	1.945.055	4	2	5,8/10	4,1k	M
Padre no hay mas que uno 2: La llegada de la suegra (Father There is Only One 2)	ES	2020	Santiago Segura	Sony	1.859.491	1	0	5,6/10	1,8k	M
Lo dejo cuando quiera (I Can Quit Whenever I Want)	ES	2019	Carlos Therón	Sony	1.838.819	0	3	5,6/10	1,9k	M
Mientras dure la guerra (While At War)	ES/ AR	2019	Alejandro Amenábar	Walt Disney	1.802.647	14	41	6,8/10	6,9k	M
Torrente V: Misión Euroveg	ES	2014	Santiago Segura	Sony	1.802.281	0	1	5,4/10	4,5k	M

Figure 12 - Top 15 National Films: Spanish Market



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Top 15 - Italian Market (order by admissions for national movies (including maj co-prod))										
Original Title of the Film	Country of origin	Year	Director	Distributor	Admissions	Awards	Nominations	IMDB grade	IMDB number	Gender (director)
Sole a catinelle	IT	2013	Gennaro Nunziante	Medusa Film	8005352	0	2	6.4/10	7.2k	M
Tolo Tolo	IT	2020	Checco Zalone	Medusa Film	6674622	3	4	5.7/10	4.7k	M
C'è ancora domani	IT	2023	Paola Cortellesi	Universal	4840575	23	21	7.7/10	7.7k	F
Quo vado?	IT	2016	Gennaro Nunziante	Medusa Film	4062788	2	4	6.6/10	13k	M
Perfetti sconosciuti (Perfect Strangers)	IT	2016	Paolo Genovese	Medusa Film	3568348	13	16	7.7/10	73k	M
Il principe abusivo	IT	2013	Alessandro Siani	01 Distribution	2380475	0	2	5.3/10	1.9k	M
Si accettano miracoli	IT	2015	Alessandro Siani	01 Distribution	2353256	1	1	4.8/10	1.1k	M
Il primo Natale (Once Upon A Time in...)	IT	2019	Ficarra, Picone	Medusa Film	2073499	3	5	5.5/10	1.3k	M
Un boss in salotto	IT	2014	Luca Miniero	Warner Bros.	1888662	0	0	5.6/10	1.6k	M
L'ora legale	IT	2017	Ficarra, Picone	Medusa Film	1807170	3	3	6.4/10	3.5K	M
Mister Felicità	IT	2017	Alessandro Siani	01 Distribution	1686802	0	1	4.9/10	611	M
Pinocchio	IT/FR/GB	2019	Matteo Garrone	01 Distribution	1654179	19	25	6.3/10	15k	M
Sotto una buona stella	IT	2014	Carlo Verdone	Filmauro/Universal	1653445	2	5	5.6/10	1.3k	M
Il ricco, il povero e il maggiordomo	IT	2014	Giovanni, Giacomo...	Medusa Film	1586491	0	0	5.4/10	2.4k	M
Me contro Te - Il film: La vendetta del Signor S	IT	2020	Gianluca Leuzzi	Warner Bros.	1548994	0	0	1.7/10	464	M

Figure 13 - Top 15 National Films: Italian Market

Top 15 - Greek Market (order by admissions for national movies (including maj co-prod))										
Original Film Title	Country of origin	Year	Director	Distributor	Admissions	Awards	Nominations	IMDB rating	DB number of v	Gender (director)
Ένας Άλλος Κόσμος - Worlds Apart	GR	2015	Christopher Papakaliatis	Village	668 502	3	5	7.4/10	9.3K	M
Ευτυχία Eftyhia	GR	2019	Angelos Frantzis	Tanweer	668 000	10	10	8.0/10	5.6K	M
Φόνισσα - Murderess	GR	2023	Eva Nathena	Tanweer	437 000	12	14	7.4/10	2K	F
Μικρά Αγγλία - Little England	GR	2013	Pantelis Voulgaris	Feelgood	361 710	9	9	7.8/10	7.9K	M
Η Ρόζα της Σμύρνης - Roza of Smyrna	GR	2016	George Kordellas	Feelgood	356 983	1	1	6.6/10	2.1K	M
Ο Άνθρωπος του Θεού - Man of God	GR	2021	Yelena Popovic	Feelgood	283 520	10	14	7.0/10	44.4K	F
Σμύρνη μου Αγαπημένη - Smyrna	GR	2021	Grigoris Karantinakis	Tanweer	267 443	6	7	6.8/10	3.4K	M
The Bachelor 2	GR	2017	Giannis Papadakos	Village	237 530	0	0	5.3/10	970	M
The Bachelor 3	GR	2019	Giannis Papadakos	Village	235 122	0	0	4.3/10	663	M
Καζαντζάκης - Kazantzakis	GR	2017	Yannis Smaragdis	Odeon	233 000	4	2	6.2/10	2K	M
Χαλβί 5-0 - Halvai 5-0	GR	2020	Manos Kampitis	Village	223 793	0	0	4.0/10	976	M
Αιγαίο SOS - Aegian SOS	GR	2018	Pierros Andrakakos	Odeon	222 703	0	0	3.9/10	622	M
Το Τελευταίο Σημείωμα - The Last Note	GR	2017	Pantelis Voulgaris	Tanweer	203 000	5	11	7.6/10	3.4K	M
...Για Πάντα - For Ever	GR	2019	Giannis Papadakos	Village	142 373	0	0	6.1/10	421	M
Ουζερί Τσιτσάνης - Cloudy Sunday	GR	2015	Manousos Manousakis	Feelgood	117 246	3	3	6.5/10	2K	M

Figure 14 - Top 15 National Films: Greek Market



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Top 15 - Polish Market (order by admissions for national movies (including maj co-prod))										
Original Title	Country of Origin	Year	Director(s)	Distributor	Admissions (ES)	Awards	Nominations	IMDB rating	DB number of v	Gender (director)
Kler (Clergy)	PL	2018	Wojciech Smarzowski	Kino Swiat	5 183 080	14	5	7,3/10	6,8K	M
Listy do M. 3 (Letters to Santa 3)	PL	2017	Tomasz Konecki	Kino Swiat	2 984 653	1	0	5,5/10	1,1K	M
Listy do M.2 (Letters to Santa 2)	PL	2015	Maciej Dejczer	Kino Swiat	2 874 420	1	0	5,5/10	1,8K	M
Pitbull. Niebezpieczne kobiety (Pitbull...)	PL	2016	Patryk Vega	Kino Swiat	2 791 928	1	0	5,6/10	2,6K	M
Miszmaz czyli Kogel Mogel 3	PL	2019	Kordian Piwowarski	Next Film	2 390 000	0	0	3,5/10	753	M
Botoks	PL	2017	Patryk Vega	Kino Swiat	2 314 882	0	0	3,8/10	2,3K	M
Bogowie (Gods)	PL	2014	Lukasz Palkowski	Next Film	2 154 737	22	9	7,6/10	8K	M
Kobiety Mafii (Women of Mafia)	PL	2018	Patryk Vega	Kino Swiat	2 037 202	0	0	4,8/10	1,9K	M
Planeta Singli	PL	2016	Mitja Okorn	Kino Swiat	1 926 090	2	1	6,8/10	3,6K	M
Polityka	PL	2019	Patryk Vega	Kino Swiat	1 890 000	0	0	3,7/10	1,4K	M
Chłopi (The Peasants)	PL/RS/LT	2023	Dorota Kobiela, Hugh Welchman	Next Film	1 852 595	10	9	7,6/10	8,1K	FM
Miasto 44 (Warsaw 44)	PL	2014	Jan Komasa	Kino Swiat	1 742 935	15	10	6,6/10	7K	M
Planeta Singli 2 (Planet Single 2)	PL	2018	Sam Akina	Kino Swiat	1 685 864	0	0	5,6/10	1,1K	M
365 dni (365 Days)	PL	2020	B. Bialowas, T. Mandes	Next Film	1 639 390	1	5	3,3/10	103K	FM
Dywizjon 303. Historia prawdziwa	PL/GB	2018	Denis Delic	Mowi Serwis	1 516 443	1	1	5,5/10	2,5K	M
Sztuka kochania (The Art of Loving)	PL	2017	Jacek Bromski	Next Film	1 459 376	6	9	7,0/10	4,3K	F

Figure 15 - Top 15 National Films: Polish Market

Top 15 - Finnish Market (order by admissions for national movies (including maj co-prod))										
Original title of the film	Country of origin	Year	Director	Distributor	Admissions	Awards	Nominations	IMDB grade	IMDB number	Gender (director)
Tuntematon sotilas	FI	2017	Aku Louhimies	SF Studios	923.955	5	5	7,7/10	13 k	M
Luukkakokous	FI	2015	Taneli Mustonen	Nordisk Film	505.376	1	0	5,1/10	2,7k	M
Mielensäpahoittaja	FI	2014	Dome Karukoski	Nordisk Film	457.334	1	4	6,7/10	3k	M
21 tapaa pilata avioliitto	FI	2013	Johanna Vuoksenmaa	Nordisk Film	403.045	1	2	6,2/10	2,1k	F
Napapiirin sankarit 2	FI	2015	Teppo Airaksinen	Nordisk Film	378.533	0	2	5,9/10	2,1k	M
Iloisia aikoja, Mielensäpahoittaja	FI	2018	Tiina Lymi	Nordisk Film	347.429	1	6	7,1/10	1,3k	F
Risto Rättäjä ja yöhaukka	FI	2016	Timo Koivusalo	Walt Disney	338.914	0	0	4,3/10	173	M
Angry Birds	US/FI	2016	Clay Kaytis & Fergal Reilly	Walt Disney	327.687	3	8	6,3/10	107k	M, M
Kanelia kainaloon, Tatu ja Patu!	FI	2016	Rike Jokela	Nordisk Film	323.664	0	2	6,0/10	386	M
Risto Rättäjä ja Sevillan saituri	FI	2015	Timo Koivusalo	Walt Disney	315.117	0	0	5,0/10	160	M
Luukkakokous 2: Polttarit	FI	2016	Taneli Mustonen	Nordisk Film	293.543	0	0	4,3/10	1,3k	M
Risto Rättäjä ja pullistelija	FI	2019	Markus Lemmusruusu	Nordisk Film	288.305	0	1	5,2/10	158	M
Napapiirin sankarit 3	FI	2017	Tiina Lymi	Nordisk Film	270.385	0	0	5,3/10	1,3k	F
Risto Rättäjä ja liukas Lennart	FI	2014	Timo Koivusalo	Walt Disney	265.615	2	0	5,2/10	227	M
Kuolleet lehdet (Fallen Leaves)	FI	2023	Aki Kaurismäki	B-Plan	254.717	12	61	7,3/10	33k	M
Teräslleidit	FI	2020	Pamela Tola	SF Film Finland	246.714	1	3	6,1/10	757	F

Figure 16 - Top 15 National Films: Finnish Market



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Top 15 - Danish Market (order by admissions for national movies (including maj co-prod))										
Original title of the film	Country of origin	Year	Director	Distributor	Admissions	Awards	Nominations	IMDB grade	B number of	Gender (director)
Druk (Another Round)	DK/SE/NL	2020	Thomas Vinterberg	Nordisk Film	802 693	60	70	7,7/10	202k	M
Journal 64 (The Purity of Vengeance)	DK/DE	2018	Christoffer Boe	Nordisk Film	765 111	2	10	7,4/10	20k	M
Fasandræberne (The Absent One)	DK	2014	Mikkel Nørgaard	Nordisk Film	764 002	3	14	7,1/10	27K	M
Kvinden i Buret (Department Q: The Keeper of Lost Causes)	DK/DE/SE	2013	Mikkel Nørgaard	Nordisk Film	721 256	3	21	7,2/10	34K	M
Flaskepost fra P (Department Q: A Conspiracy of Faith)	DK/DE/SE/NO	2016	Hans Petter Moland	Nordisk Film	704 971	3	11	7/10	23K	M
Jagten (The Hunt)	DK/SE	2013	Thomas Vinterberg	Nordisk Film	673 022	38	73	8,3/10	373K	M
Ternet ninja (Cleckered Ninja)	DK	2019	Christoffersen, Matthesen	Nordisk Film	621 463	5	4	7,1/10	6,6K	M, M
Klassefesten 2: Begravelsen (The Reunion 2: The Funeral)	DK	2014	Mikkel Serup	Nordisk Film	604 364	N/A	1	5,7/10	1,9K	M
Klassefesten 3: Dåben (The Reunion 3)	DK	2016	Birger Larsen	Nordisk Film	538 506	N/A	2	5/10	1,2K	M
Klovn Forever	DK	2015	Mikkel Nørgaard	Nordisk Film	512 056	1	1	6,2/10	5,3K	M
Bamse (A Lucky Man)	DK	2022	Henrik Ruben Genz	Nordisk Film	479 860	2	8	7,3/10	846	M
Jagtsæson (Hunting Season)	DK	2019	Tilde Harkamp	Nordisk Film	473 622	N/A	2	4,9/10	892	F
Ser du månen, Daniel (Held for Ransom)	DK	2019	N. Oplev, A. Berthelsen	Nordisk Film	472 559	6	16	7,6/10	4,9K	M, M
Retfærdighedens ryttere (Riders of Justice)	DK	2020	Anders Thomas Jensen	Nordisk Film	459 773	9	34	7,5/10	66K	M
Klovn the Final	DK	2020	Mikkel Nørgaard	Nordisk Film	437 381	N/A	1	6,6/10	2,6K	M

Figure 17 - Top 15 National Films: Danish Market

Top 15 - Swedish Market (order by admissions for national movies (including maj co-prod))										
Original Title of the Film	Country of origin	Year	Director	Distributor	Admissions	Awards	Nominations	IMDB grade	B number of	Gender (director)
En man som heter Ove (A Man Called Ove)	SE/NO	2016	Hannes Holm	Nordisk Film	1 285 966	6	11	7	43K	M
Hundraåringen som klev ut genom... (The 100 Year-Old Man Who Climbed Out the Window and Disappeared)	SE	2014	Felix Herngren	Walt Disney	1 143 881	15	29	7,7	70K	M
Solsidan (Sunny Side)*	SE	2017	M. Herngren, F. Herngren	SF Film	784 094	2	2	6,5	5,2K	M, M
En underbar jävla jul (Holy Mess)	SE	2015	Helena Bergström	SF Film	600 570	N/A	3	5,5	3,5K	F
Monica Z	SE	2013	Per Fly	SF Film	517 077	5	9	6,8	4,4K	F
En man som heter Ove (A Man Called Ove)	SE/NO	2015	Hannes Holm	Nordisk Film	429 028	6	11	7	43K	M
Hundraåringen som klev ut genom... (The 100 Year-Old Man Who Climbed Out the Window and Disappeared)	SE	2013	Felix Herngren	Walt Disney	423 879	15	29	7,7	70K	M
Ted - för kärlekens skull (Ted - Show Me Love)	SE	2018	Susanne Cederberg	Fox/Nordisk	413 670	N/A	N/A	7,4	240	F
Hundraårtårningen som smet från... (The 101-Year-Old Man Who Skipped Out on the Bill and Disappeared)	SE	2017	M. Herngren, F. Herngren	Walt Disney	398 456	2	7	6,3	6,7K	M, M
Sune i Grekland - All... (Sune in Greece...)	SE	2013	Hannes Holm	Nordisk Film	389 858	1	N/A	4,3	2,2K	M
Solsidan (Sunny Side)*	SE	2018	M. Herngren, F. Herngren	SF Film	387 435	2	2	6,5	5,2K	M, M
Bamse och tjuvstaden (Bamse and the Bamse and the Thief City)	SE	2014	Christian Ryltenius	Nordisk Film	321 664	N/A	1	6,1	787	M
Sune i fjällen (The Anderssons Rock the Mountains)	SE	2014	Gustaf Åkerblom	Nordisk Film	311 945	N/A	1	4,1	1,2K	M
En del av mitt hjärta (A Piece of My Heart)	SE	2020	Edward af Sillén	Nordisk Film	261 322	N/A	4	5,3	1,5K	M
I Am Zlatan	SE/DK/NL	2022	Jens Sjögren	Nordisk Film	231 197	1	7	6,2	4,2K	M

Figure 18 - Top 15 National Films: Swedish Market



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2. INSTITUTIONAL OVERVIEW AND NATIONAL-FUNDED SUPPORTING SCHEMES

This section examines the institutional strategies implemented by the eight States studied - France, Spain, Greece, Italy, Poland, Denmark, Sweden and Finland - to promote their cinema across the EU Member States and beyond the borders of the EU. It examines the objectives pursued, the institutional players mobilised and the specific programmes and measures developed to increase the visibility of their national film productions abroad. By adopting a comparative approach, the aim is to highlight the ways in which each State conceives and structures its institutional action in favour of the external promotion of its film industry, taking into account specific logics, national priorities and resources mobilised.

2.1 France

2.1.1 Objectives

In France, the film industry is supported by a broad network of public institutions, each specialising in different branches of the film sector. A central element of their mission is the international promotion of French cinema, which constitutes a primary strategic focus. These various organisations operate with a shared objective: to enhance the global visibility and influence of the French film industry. The objectives of France's policies concerning the international promotion of its film industry are multifaceted and embedded within a broader strategic framework that integrates diplomatic, economic, cultural, and linguistic considerations.

From an economic standpoint, the French film industry comprises a wide array of sectors, including production, cinema exhibition, distribution and film festivals, all of which make substantial contributions to the national economy. The international export of French films also generated significant revenue; in 2023, it brought in €271,400,000, according to the Unifrance Report ([Unifrance, 2024](#)). The sector's financial sustainability is bolstered by the establishment of international distribution agreements, foreign investment, and co-production opportunities. France's strategic efforts to position its cinema as a leading force within the EFI contribute to French cinema's competitiveness on the global stage. Moreover, while the economic impact of film festivals is not always easily quantifiable, their role extends beyond showcasing films; they also influence production and distribution processes (Iordanova, 2015). These festivals have a tangible economic impact on host cities. For instance, Cannes experienced significant development in the



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1960s, largely thanks to the increased tourism and prestige associated with its internationally renowned film festival (Mazdon, 2007). Although such economic contributions are often underreported, they remain vital to local economies (Mazdon, 2007).

Culturally, as an artistic form, cinema reflects diverse viewpoints, practices and aesthetic approaches, thereby enriching the global cultural landscape (Int. Fr7). France leverages this diversity to project its core values internationally, including democratic principles, freedom of expression and respect for minority rights (Int. Fr5). Cinema serves as a powerful medium through which these values are expressed, while simultaneously showcasing French industry and expertise (Int. Fr4). Furthermore, it plays a key role in disseminating the French language through the global distribution of audiovisual content (Int. Fr6).

The international promotion of French cinema also carries significant diplomatic and political weight (Int. Fr7). It helps reinforce France's global image and positions cultural diversity as a cornerstone of its foreign policy (Int. Fr5). The Institut français, for instance, employs cinema as a tool for 'diplomacy of influence' through non-commercial screenings that emphasise artistic value over commercial gain (Int. Fr4; [Institut Français, 2022](#)). "There has been a shift in thinking at the Ministry of Foreign Affairs since the early 2010s, at least in public discourse, although it existed implicitly before. It's the idea of genuinely influencing civil societies for what are considered good reasons - from the perspective of the official narrative, of course, namely through values like democracy, respect for minorities, and so on. And this notion of influence is very important, as it was established as the sixth strategic function by the President of the Republic. Not just for cultural diplomacy and foreign affairs, but for France as a whole, within the framework of what's called the national strategic review." (Int. Fr6). Thus, the promotion of French cinema serves not only as a cultural export but also as a means of projecting France's political model abroad, supporting the development of cultural policies in other countries (Int. Fr5).

This approach gained particular prominence in the early 1990s during the international negotiations leading to the establishment of the World Trade Organisation (WTO), when French foreign policy strongly advocated for the principle of l'exception culturelle (cultural exception) (Vlassis, 2015). This principle continues to inform France's strategic positioning in its cultural diplomacy.



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The cultural exception principle emphasises the specific nature of audiovisual goods and services. These are not merely commercial commodities exchanged in markets, but are instead imbued with intrinsic cultural value and contribute to human development. Accordingly, the cultural exception legitimised public intervention in the cultural and audiovisual sectors. Such measures stood in contrast to the broader liberalisation agenda of US trade diplomacy, which since the early 1990s has prioritised the removal of regulatory and financial restrictions in the audiovisual domain, into the international trade negotiations, such as the General Agreement on Trade in Services (GATS) negotiations, the discussions on the Multilateral Agreement on Investment within the Organisation for Economic Co-operation and Development (OECD), and the North American Free Trade Agreement (NAFTA).

It is within this context that the Convention on the Protection and Promotion of the Diversity of Cultural Expressions (CDCE), adopted by UNESCO in 2005, emerged as a countermeasure to the perceived threats posed by economic integration to national cultural policies. The notion of 'cultural diversity,' which gained prominence through the efforts of French and Canadian officials in the late 1990s (Gagné & Deblock, 2016; Vlassis, 2015), served to generalise and internationalise the concept of the cultural exception. Consequently, tensions over cinema as a diplomatic tool became apparent during negotiations for UNESCO's CDCE, as the Convention clashed with US values of free trade in the audiovisual industry (Kessler, 2020; Vlassis, 2015). This reframing aimed to establish a new normative order that balanced cultural sovereignty with the imperatives of international trade (Musitelli, 2006).



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2.1.2 Actors

State Ministries

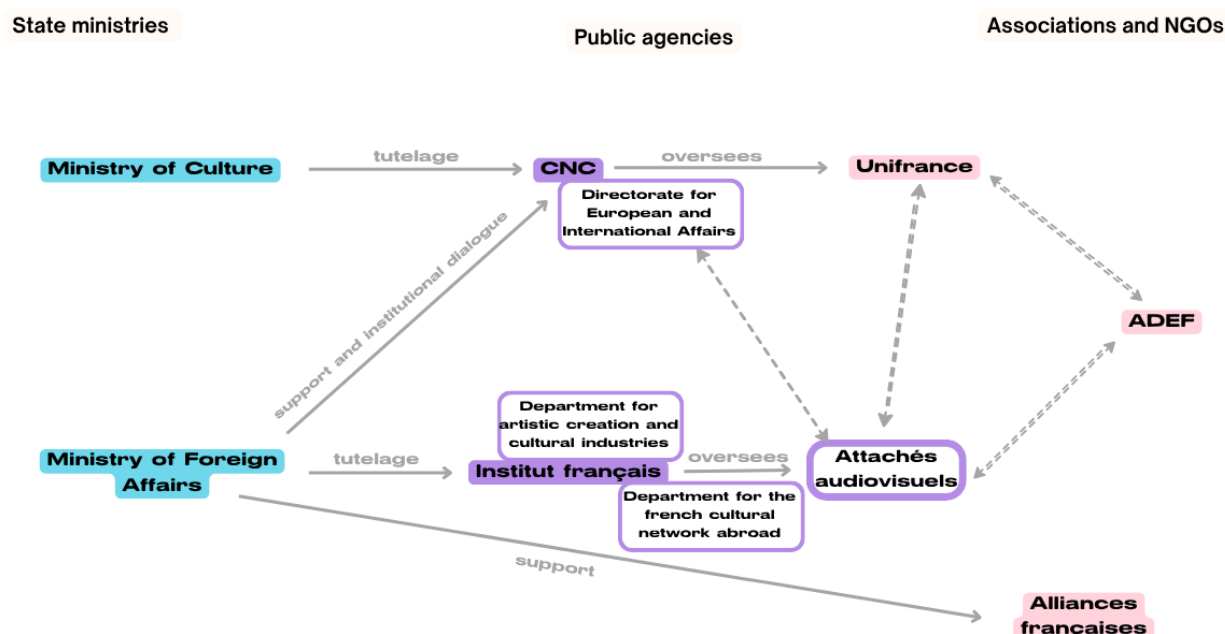


Figure 19 – French Film Industry: International Promotion Actors Map

Ministry of Culture

The French Ministry of Culture was established in 1959, marking a significant institutional shift that brought together various agencies previously affiliated with other ministries. Among these was the National Centre of Cinema (Centre National du Cinéma - CNC), founded in 1946 and formerly under the jurisdiction of the Ministry of Industry and Commerce (O'Shaughnessy, 2011). Over subsequent decades, the Ministry's mandate evolved, incorporating additional agencies and directorates that reflected a broadened understanding of culture—not only as a domain of artistic and heritage preservation but also as a strategic instrument for promoting French values and stimulating national economic sectors (Négrier, 2019).

As of January 2024, the Ministry of Culture is structured into five departments, all overseen by a General Secretary. These departments cover the following areas: heritage and architecture; artistic creation, including visual arts, dance, and music; media and cultural industries; and cultural transmission, regional engagement, and cultural democracy and the promotion of the French



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language ([Ministère de la Culture, 2024a](#)). The Ministry provides substantial financial support across multiple cultural domains. For instance, the audiovisual public sector is allocated a budget of €4,030,000,000 for the fiscal year 2025 ([Ministère de la Culture, 2024b](#)).

In the field of cinema, most legislative and financial responsibilities are delegated to the CNC, whose president is appointed directly by the President of the Republic. Consequently, the Ministry of Culture's role in the film sector is largely limited to offering subsidies and outlining general policy directions. Additionally, the Ministry shares oversight of the Institut français with the Ministry of Foreign Affairs (MoFA). The Institut français plays a key role in the international, non-commercial dissemination of French cinema, thus contributing to the broader strategy of cultural diplomacy (Lecler, 2015).

Ministry of Foreign Affairs

The Ministry for Europe and Foreign Affairs (Ministère de l'Europe et des Affaires étrangères, MoFA) serves as a key institutional actor in the international promotion of the French film industry. It holds responsibility for France's international cultural action, encompassing the dissemination of French culture across various domains, including audiovisual and cinematographic sectors. This mission is supported by a dedicated department for cultural, educational, academic, and scientific diplomacy (Int. Fr5, 2025; [Ministère de l'Europe et des Affaires étrangères, 2025b](#)). The MoFA oversees France's diplomatic network, with embassies playing a critical role in implementing film-related cultural promotion strategies abroad. In many cases, embassies have established specialised services focused exclusively on advancing the French film industry, notably through the deployment of 'audiovisual attachés' (attachés audiovisuels), cultural diplomats embedded within embassy teams (Lecler, 2015; Int. Fr6).

While the MoFA is among the primary state actors involved in international film promotion (Int. Fr5), it largely exercises its influence through affiliated institutions and collaborative frameworks. Notably, it supervises the *Institut français*, the principal agency for non-commercial international dissemination of French cinema (Danan, 2000), and provides financial support to organisations such as *Unifrance*, which is responsible for the commercial promotion of French films internationally ([Unifrance, n.d.](#)). In addition, the MoFA works closely with the CNC on the co-funding and implementation of promotional initiatives targeting foreign markets ([Ministère de l'Europe et des Affaires étrangères, 2021](#)).



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The integration of cinema into the MoFA's cultural policy framework dates back to the early 1980s, when a broader 'multimedia approach' was adopted (Danan, 2000). This strategy built upon the model previously developed for the export of French literature, whereby audiovisual content, initially distributed as free, monolingual videocassettes, was disseminated via embassies worldwide with the aim of promoting the French language and reinforcing France's cultural presence abroad (Lancien, 2004; Lecler, 2015). While the use of physical media has since been replaced by digital distribution, the underlying objective remains the same: to support the global diffusion of French culture and language, notably through the efforts of the Institut français (see next section).

Furthermore, the MoFA plays an active diplomatic role within the EU, advocating for the creation of cultural programmes and lobbying for increased funding for the audiovisual sector at the EU level (Int. Fr5). Through these combined efforts, the Ministry significantly contributes to reinforcing France's soft power and its global cultural influence.

Public agencies

Centre national du cinéma (CNC)

The National Centre for Cinema and the Moving Image (Centre national du cinéma et de l'image animée, CNC) is a pivotal institution in the governance and promotion of the French film industry. Established by the Act of 25 October 1946, the CNC initially operated under the supervision of the Ministry of Information, and later the Ministry of Industry, before being placed under the authority of the Ministry of Culture in 1959 (Scott, 2000). Despite this institutional tutelage, the CNC functions as an administratively and financially autonomous body with exclusive authority over the regulation and support of the cinema and audiovisual sectors (Hayward, 2005). Its legal framework is governed by the Cinema and Moving Image code (Code du cinéma et de l'image animée), whose legislative component was formalised by Decree No. 2009-926 of 24 July 2009. This code further outlines the CNC's responsibilities and the structure of its financial support mechanisms ([CNC, 2024](#)).

The CNC is primarily financed through sector-specific taxes levied on industry stakeholders, enabling it to support the film and audiovisual industries across a wide spectrum of activities. In the area of international promotion, the Directorate of European and International Affairs is tasked with implementing policy across five strategic domains: managing cinematographic and audiovisual



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co-productions; coordinating international cooperation initiatives, some of which are co-financed with external partners; supporting the export and distribution of French works abroad, particularly through collaboration with *Unifrance*; maintaining relations with the EU; and defending cultural diversity in international fora such as the WTO ([CNC, 2023a](#)). The CNC is frequently represented at international events, including film festivals, by *Unifrance*, exemplifying the close partnership between the two organisations (Int. Fr3).

The CNC may be characterised as a hybrid institution, combining features of both a state agency and a corporatist body. While it enjoys formal administrative and governmental legitimacy, the CNC's decision-making commissions, responsible for determining the attribution of public funding, are composed of professionals drawn directly from the film industry. The CNC addresses the needs of the industry through flexible and responsive mechanisms (Int. Fr5). It also serves as a forum for professional dialogue, maintaining ongoing collaboration with sector-specific organisations such as the Association of French Film Exporters (ADEF) (Int. Fr3).

The CNC's financial support for film creation is divided into two principal forms: automatic and selective aid, accounting for approximately 60% and 40% of its funding portfolio, respectively (Amiot-Guillouet, 2017; [Vlassis, 2012](#)). This financing system is widely regarded as virtuous, as it supports production and encourages co-productions, while facilitating both commercial and non-commercial distribution (Int. Fr4). In 2023, the CNC allocated a total of €311,200,000 to support film creation. Of this amount, 42% was dedicated to production, 31% to exploitation, 17% to distribution and 10% to exhibition activities ([CNC, 2024f](#)).

Institut français

The French Institute (Institut français) is the current executive agency of the MoFA and the Ministry of Culture, tasked with implementing France's external cultural policy (Int. Fr5, 2024). Established by the Act of July 2010 and officially operational since 1 January 2011, the Institut français plays a central role in advancing France's cultural diplomacy. It operates as part of France's broader 'cultural network', which also includes institutions such as the French Alliances (Alliances Françaises - AF). Together, these entities aim to strengthen France's cultural projection abroad and promote the global dissemination of the French language (Int. Fr4; Int. Fr6; [Fondation des Alliances Françaises, 2024](#)).



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The creation of the Institut français was driven by a strategic objective to reorganise and consolidate France's external cultural action. Prior to its establishment, several Instituts français operated independently in various countries, without a unified administrative structure. Inspired by models such as the British Council and the Goethe-Institut, the formation of a single overarching organisation was intended to improve the visibility and coherence of French cultural diplomacy (Lecler, 2015; Premat, 2013). As such, the Institut français now functions as the principal operator for managing France's external cultural engagement. The Institut français plays a distinctive role, primarily through the non-commercial distribution of French films. In accordance with Decree No. 2010-1695 of 30 December 2010, these activities are not profit-oriented. The Institut français acquires distribution rights for selected films and makes them freely available across its cultural network, including for use in educational contexts, such as within French language courses, or during cultural events such as local film festivals. This initiative serves not only to promote French cinema but also to enhance the visibility of the French language and cultural values abroad.

Besides distribution, the Institut français contributes to capacity building within the cultural network by offering expertise and professional training, especially in sectors where France holds a competitive edge, such as virtual reality (VR). It organises audiovisual and cinema training sessions to equip cultural agents with the tools needed to adapt to diverse local contexts. These efforts aim to improve the implementation of audiovisual initiatives, foster cinematographic cooperation, and support regionally led projects ([Institut français, 2023b](#); Int. Fr3). Moreover, the Institut français actively collaborates with other major stakeholders, including Unifrance and the CNC, and participates in numerous European and international initiatives. Through these partnerships and programmes, it plays a crucial role in sustaining and expanding the reach of French cinema on the global stage (Int. Fr4).

Attachés audiovisuels

A significant milestone in the institutionalisation of French cultural diplomacy was the establishment of the status of audiovisual attachés (attachés audiovisuels) in 1987 (Lecler, 2016). These professionals are diplomats whose primary responsibilities lie in the cultural domain, with a particular focus on cinema and audiovisual sectors. Over time, the role has undergone a process of professionalisation, marked by the increasing recruitment of individuals from the audiovisual sector, especially those with experience in the private cultural industry (Int. Fr6; Lecler, 2015).



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Although appointed and remunerated by the MoFA, audiovisual attachés operate under the supervision of the Institut français (Int. Fr7).

As of 2024, the French diplomatic cultural network comprises 64 agents working in the audiovisual field: 37 audiovisual attachés, 14 regional and 23 bilateral, and 27 project managers. These individuals collectively cover 117 countries and territories across Sub-Saharan, West, East, Central, and Southern Africa, North and South America, Southeast Asia, Europe, the Balkans and Caucasus regions, and the Middle East. This extensive network ensures that each region is connected to the full array of French institutions engaged in international film promotion (Int. Fr6). This territorial deployment is one of the defining characteristics of France's cultural diplomacy.

According to interviewees, audiovisual attachés act primarily as information relays. They possess in-depth knowledge of local film markets, including box office trends and distribution networks, and maintain a strong local presence. Their role extends beyond promotional activities to include diplomatic functions such as advising on geopolitical sensitivities, monitoring legislative and regulatory changes in the audiovisual sector, and facilitating cultural events, including film festivals (Int. Fr3; Int. Fr8; Int. Fr2).

They also serve as institutional intermediaries between local film professionals and French cinema stakeholders, assisting with the development of collaborative projects: “[...] the network of audiovisual attachés, who work within French embassies, also contribute to promoting French cinema; not necessarily in the same way as the Institut français does by screening films, but by building relationships with industry professionals, connecting professional sectors, and establishing agreements with local partners, which may include film festivals or distributors, to support the distribution of French films.” (Int. Fr5). A notable illustration of their impact can be found in Argentina in the late 1980s. In response to local filmmakers' difficulties in securing funding, the audiovisual attaché organised the Georges Méliès Festival and established an award that enhanced the visibility and legitimacy of local projects applying for French support. The attaché further facilitated applications to French funding schemes by transmitting them via the diplomatic bag, thereby removing the cost barrier associated with international postage (Delestre, 2014).

Internally, the Institut français supports the activities of audiovisual attachés by organising thematic meetings that allow for the exchange of best practices across different territories (Int. Fr4). These



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forums serve as platforms for peer learning and the reinforcement of institutional coherence in the implementation of cultural policy. The interviews conducted underscore that the activities of audiovisual attachés encompass both commercial and non-commercial dimensions. On the non-commercial side, their mandate includes the international promotion of French film heritage and cultural values. On the commercial side, they facilitate the expansion of the French film industry by creating connections between professionals across borders. This dual mission, cultural and economic, positions audiovisual attachés as strategic agents in France's global audiovisual diplomacy, contributing simultaneously to the circulation of French language and culture as well as to the internationalisation of its cultural industries.

Associations and NGOs

Unifrance

Unifrance is a professional association dedicated to the international promotion of French audiovisual works. Established in 1949 under the Act of 1 July 1901, which governs associations in France, Unifrance operates primarily within the business-to-business (B2B) sphere. While Unifrance maintains a degree of autonomy, the association relies heavily on public funding, approximately 90% of its budget is provided by the CNC, with the remaining 10% financed by the MoFA, based on contractual agreements that specify both the territories covered and the types of promotional activities undertaken (Int. Fr8; Int. Fr5). With a global presence that includes around 50 collaborators and representatives stationed across multiple territories, Unifrance works to promote French films and audiovisual content to international audiences, professionals and media ([Unifrance, n.d.b](#)).

Unifrance operates as a complementary body to the Institut français, although the two institutions serve distinct purposes within the broader framework of France's international cultural engagement. While the Institut français is principally concerned with non-commercial cultural diplomacy, Unifrance adopts a market-oriented approach, focusing on enhancing international market access and the commercial visibility of French audiovisual content (Int. Fr6). Unifrance maintains close and sustained relationships with professionals in the French film and audiovisual industry and it acts primarily in support of their commercial objectives, notably in the domains of international distribution and the promotion of new film releases (Int. Fr8). The films it promotes typically fall within the definition of 'French works' as stipulated by the CNC, encompassing productions led by France-based companies or majority French co-productions ([Unifrance, n.d.b](#)).



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Unifrance further extends its international reach through the deployment of territorial representatives, known as territory managers (*chargés de territoire*), whose role is broadly comparable to that of audiovisual attachés. These representatives are tasked with advancing the international interests of French audiovisual professionals within designated geographic regions. In addition to this decentralised network, Unifrance operates three international offices, located in New York, Beijing and Seoul, the latter of which also holds jurisdiction over Japan and Southeast Asia. These strategic locations underscore the organisation's commitment to supporting the global circulation and commercial positioning of French audiovisual works ([Unifrance, n.d.c](#)). However, while audiovisual attachés represent the French State and its broader cultural and diplomatic interests, territory managers act specifically on behalf of French film professionals. Their mandates are more targeted and market-driven, informed by territorial strategies rather than overarching national policies (Int. Fr1; Int. Fr5). The division of labour reflects differing institutional priorities: the CNC, as Unifrance's primary funder, applies a specific territorial logic, while the challenges associated with commercial film sales are inherently shaped by local market dynamics (Int. Fr8; Int. Fr4). Unifrance thus adopts a dual approach: in major film markets, it engages proactively; whereas in minor markets, it adopts a more reactive stance, providing support primarily upon request (Int. Fr8).

A central component of Unifrance's mission is economic intelligence. The organisation systematically collects data on international markets and provides this intelligence to French distributors and industry professionals (Int. Fr5). Its box office data collection plays a crucial role in informing the CNC's automatic support mechanisms (Int. Fr1). Although Unifrance does not exercise regulatory authority over the film sector, unlike the CNC, it exerts significant influence through its role in shaping strategic priorities and market positioning via the information it disseminates (Int. Fr1; Int. Fr2). Unifrance also supports the development of local film industries through initiatives such as training programmes and student exchanges (Int. Fr4). To bolster exports, it participates in international film festivals, facilitates the presence of French talent through logistical and financial support, and assists with promotional campaigns post-sale by providing funding for distributors and promotional travel (Int. Fr1; Int. Fr2). Additionally, Unifrance invests in short film exports and collaborates with both the CNC and the Institut français to promote immersive and innovative audiovisual works (Int. Fr3). Media outreach forms another pillar of its strategy: the association hosts press-focused events to enhance international visibility for French productions and publishes an annual *Ten actors to Watch* ranking to highlight emerging



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French acting talent, thereby increasing global exposure for both the artists and the films they represent (Int. Fr1; Int. Fr2).

Association des Exportateurs de Films Français

Association of French Film Exporters (Association des Exportateurs de Films Français - ADEF) is a non-profit association established under the French Law of 1 July 1901. It brings together approximately 30 international sales companies that are active in the promotion and distribution of French cinema (Int. Fr1). The primary aim of film distributors is to maximise the distribution of French films across as many territories, and to as many distributors, as possible. This is achieved through in-depth knowledge of international markets, enabling them to identify the preferences of foreign distributors and match films accordingly (Int. Fr2). Sales activities are largely structured around the international festival calendar, with major markets such as the Cannes Film Festival and Berlinale serving as critical moments for commercial negotiations and deal-making (Int. Fr8). Beyond its commercial mandate, ADEF also plays an advocacy role at the European level, notably by raising awareness of the profession of sales agents and ADEF's role within the broader audiovisual ecosystem.

ADEF maintains strong collaborative ties with Unifrance, particularly through its coordination with Unifrance's territory managers, who provide insights on the types of films that tend to perform well in specific international markets. These data-driven insights help ADEF members fine-tune their sales strategies (Int. Fr1). In addition, ADEF cooperates with the Institut français in the context of French film festivals organised abroad, such as the annual Alliance Française French Film Festival in Australia. These events, typically coordinated by the French ambassador, cultural attachés, and local AF, are considered crucial for ADEF's members. A film's success in such festivals often serves as a gateway to wider theatrical release in the host country, thus generating tangible commercial benefits for sales agents and distributors alike.

The Alliances Françaises Network

The Alliances Françaises (AF) network, founded in 1883, is a global network of cultural and educational institutions dedicated to the promotion of the French language and Francophone cultures. As of 2023, the network included 829 local AF operating in 135 countries, grouped into six geographical zones: Africa, the Indian Ocean and the Middle East; Central America and the Spanish-speaking Caribbean; English-speaking North America and the Caribbean; South America; Asia and Oceania; and Europe ([Fondation des Alliances Françaises, 2023](#)).



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The mission of the AF includes the teaching and dissemination of the French language, the promotion of French and Francophone cultures, and the encouragement of intercultural dialogue. Each Alliance operates autonomously, both legally and financially, in accordance with its status as an association. However, the network is coordinated and quality-controlled by the *Fondation des Alliances Françaises*, a public-utility NGO that manages the use of the 'Alliances Françaises' label, and which is supported by the MoFA through a triennial agreement ([Fondation des Alliances Françaises, 2023](#)).

In 2023, the network generated a combined turnover of €210,000,000. The MoFA contributed €31,000,000 to support the network's activities, distributed as follows: €22,000,000 for the provision of expatriate personnel; €6,840,000 in subsidies disbursed via embassies; €620,000 for the coordination and creation of new AF; €165,000 in exceptional credits; €480,000 for the physical security of AF premises; €332,000 for digital transformation projects; and €600,000 as a direct subsidy to the *Fondation* itself. In addition, MoFA seconded 142 agents to work within the AF globally ([Fondation des Alliances Françaises, 2024](#)).

While their primary mission extends beyond film promotion, the AF are significant contributors to France's cultural diplomacy in the audiovisual field. As members of the broader French cultural network, they have access to the IFcinéma catalogue curated by the Institut français, enabling them to use French films as tools for pedagogical and cultural engagement (see next section). Many of them organise screenings on their premises, often as part of French language instruction or cultural events, and contribute to the diffusion of French cinema by promoting Institut français initiatives via websites and social media. By 2023, 458 AF were active users of the IFcinéma platform ([Fondation des Alliances Françaises, 2024](#)).

2.1.3 State-funded programmes

In order to promote French cinema abroad as well as its industry and its know-how, France has set up various programmes that help finance international promotion, encourage co-production and highlight France as a location for foreign films. Further details on funding amounts and selected projects are available in [Annex II](#).



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Support for writing and production

Fonds Sud Cinéma

The *Fonds Sud Cinéma* (FSC) serves as a notable example of how France has historically promoted both its film industry and cultural expertise abroad. Established in 1984 by the Ministry of Culture, via the CNC, and the MoFA, this funding scheme was designed to support feature-length fiction, animation, and documentary films intended for theatrical release, produced by filmmakers based in countries of the Global South. Since 1997, the FSC has supported over 500 films originating from regions including Africa, Latin America, and Asia ([CNC, 2010](#)). With an annual budget of €2,000,000 individual projects were eligible for up to €152,000 in funding.

The initiative pursued dual objectives: diplomatic and symbolic influence alongside economic benefits. As Amiot-Guillouet (2017) argues, the FSC was intended to counterbalance U.S. cultural hegemony by advancing a model of cinema rooted in co-productions that highlighted local cultures, in contrast to the homogenised narratives of Hollywood. Rather than adhering to a strictly geographical distribution, the programme adopted a geopolitical approach, particularly informed by France's colonial history (Viñuela, 2018).

However, the FSC was not without its criticisms. While it guaranteed co-produced films a screening in French cinemas, the co-productions were often heavily influenced, if not dominated, by French stakeholders, sometimes at the expense of the artistic autonomy of the partner country (Amiot-Guillouet, 2017). Moreover, funding was not adjusted to account for cost-of-living disparities across regions, leading to significant imbalances in production conditions. An additional concern was the requirement that post-production be carried out in France—an obligation that effectively channelled a large portion of the financial aid back into the French economy, limiting the benefits for recipient countries. Despite these limitations, the FSC played a crucial role in reinforcing France's commitment to cultural diversity, positioning itself as an advocate for global creative expression and as a bulwark against market-driven standardisation (Amiot, 2018).

Similar challenges were encountered with the *Africa Cinemas* programme, launched in 2003 by the MoFA in cooperation with the OIF and the European Development Fund. The initiative was intended to support film distributors and exhibitors in sub-Saharan Africa and to modernise cinema infrastructure, with a focus on enhancing intra-African film distribution. The programme had an annual budget of €1,500,000 ([Hoefert de Turégano, 2006](#)). Nevertheless, it was discontinued in



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January 2005. The appointed programme officer publicly criticised the initiative for infantilising local partners and misallocating resources, thereby failing to achieve its intended socio-economic impact (Barlet, 2011). The shortcomings were attributed to a number of structural issues: a funding model overly focused on production rather than sector-wide development, a steady decline in distribution networks, political interference, and clientelism (Barlet, 2011, p. 63).

The termination of both the FSC and Africa Cinemas programmes marked a significant shift away from the top-down approach that had characterised previous international film assistance strategies. In response, French film diplomacy moved toward more context-sensitive models of support, leading to the establishment of the Aide aux Cinémas du Monde (ACM).

Aide aux cinémas du monde

The FSC was replaced in 2012 by the ACM, a selective funding programme jointly administered by the CNC and the *Institut français*. The ACM is designed to promote and support international co-productions ([CNC, 2024k](#)). Its primary beneficiaries are countries that maintain co-production agreements with France, thereby facilitating structured and reciprocal collaborations (Viñuela, 2018). Since its inception, the ACM has supported over 600 projects, funding approximately 50 to 60 productions per year ([Institut français. n.d.a](#)).

The programme comprises two main strands: pre-production and post-production support. Pre-production aid is capped at €300,000 per project, with the possibility of an increase to €500,000 for French-initiated films with budgets exceeding €2,500,000. Post-production support is limited to a maximum of €70,000 ([CNC, 2024k](#)). Through this framework, the ACM enables France to maintain a central position within the global co-production ecosystem, reinforcing the influence of its cultural policies and film model (Viñuela, 2018; Pomp, 2020). In this context, France actively promotes the practice of co-production, which is deeply embedded in its film industry and institutional culture (Viñuela, 2018).

Nevertheless, this approach has prompted critical reflection. As Jäckel (2007) notes, co-productions often oscillate between two extremes: films tailored predominantly to international audiences that may marginalise French cultural values, and productions that are overly embedded in a Franco-centric perspective, lacking openness to external creative inputs. This tension reflects broader debates regarding the benefits and limitations of co-production models, which are further examined in the subsequent section on bilateral co-production agreements.



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COCO-I: International Co-Writing Support

The International Co-Writing Support programme (Aide à la co-écriture de coproductions internationales - COCO-I), established by the CNC, provides financial support for the co-writing of international fiction series. It specifically targets projects involving authors of different nationalities and aims to foster original creation, renew audiovisual narratives, and diversify fiction genres and audiences. Eligible projects must include at least two authors and demonstrate an international artistic vision. With an annual budget of €400,000, COCO-I supports eight projects each year, allocating €50,000 per selected initiative to cover pilot script development and collaboration expenses ([CNC, 2024i](#)). In 2024, recipients represented a diverse geographic range including Asia, North Africa, Sub-Saharan Africa, the Middle East, and Europe.

Support for distribution and export

Support for Short Film Exporters Abroad

Initiated in 2016, the Short Film Export Support Scheme is managed by Unifrance and financed by the CNC. It aims to assist French short film sales companies in expanding their presence abroad. The funding supports market prospection, promotional tools, and other activities that enhance the visibility and circulation of French short films. Each eligible company may receive up to €13,000 annually, with the total programme budget capped at €60,000. Applicants must have sold at least 10 French or co-produced short films from five different rights holders and have generated a minimum of €10,000 in revenue from these sales in the prior year ([Unifrance, 2023a](#); Int. Fr3).

Fund for the Promotion of Cinematographic Works Abroad

Launched in 2017, this automatic CNC aid targets international sales agents and rewards the international success of French films. The support is based on several performance metrics, including box office admissions across 69 non-francophone territories, festival accolades, and VoD availability. Financial support ranges from €0.05 to €0.70 per admission, with a lump sum of €4,000 granted for films with fewer than 50,000 admissions. A second component incentivises producers to consider international potential from the project's inception ([CNC, 2024d](#)).



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Residency programmes and support for artists

Caméra Libre

Caméra Libre is a residency programme launched in 2022 by the CNC in partnership with the Cité Internationale des Arts and NGO Usage du Monde. It is intended for foreign filmmakers who have been selected at major international festivals but face censorship, violence, or political repression in their home countries. The residency allows them to develop a new international feature film project in Paris. Eligible participants must be from non-EU, non-European Free Trade Area (EFTA) countries and not reside in other major cinema-producing nations such as the USA or Japan. With an annual budget of €200,000, the programme supports 8 to 10 filmmakers every six months, each receiving €25,000 ([CNC, 2024i](#)).

Institut français Residencies

In collaboration with the Cité Internationale des Arts, the Institut français offers artists—including filmmakers—living abroad the opportunity to develop creative projects in Paris. Applicants must be endorsed by a cultural partner and can stay for 3, 6, or 9 months in one of 22 dedicated studios. The Institut covers housing and provides a monthly stipend of at least €1,000 ([Institut français, n.d.h](#)). Additionally, 35 international residencies are managed through embassies and cultural institutes, welcoming French and France-based artists across disciplines such as cinema, dance, and visual arts ([Institut français, n.d.g](#)).

Support for immersive technologies

French Immersion XR

French Immersion XR is a programme launched in 2023 by Unifrance, the CNC, and the Institut français, initially developed by the Audiovisual Attaché of Villa Albertine in the USA. It supports the travel of French immersive content creators to international extended reality (XR) events and provides logistical assistance for networking. Eligible French producers may receive €300 for travel within Europe and €1,000 outside Europe. In its first year, the programme supported attendance at 21 events in 13 regions, expanding to 30 events in 2024 ([Institut français, n.d.d](#)).

VR Selection

To further promote French immersive content, the VR Selection curated by the Institut français provides rights-cleared VR works for distribution across its global cultural network. The platform



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not only enhances the reach of VR content but also promotes French expertise and creative diversity in immersive media ([Institut français, n.d.f](#)).

Programmes to stimulate film production in France

Inspiration Tour

Launched in 2024, the Inspiration Tour targets foreign professionals responsible for determining film shooting locations. Its goal is to showcase French heritage, technical capabilities, and the country's support infrastructure for audiovisual production. Managed by the CNC, the fund provides €50,000 per selected project (not exceeding 80% of the project's total cost), with two projects funded in 2025 ([CNC, 2024h](#)).

Tax Rebate for International Production (TRIP)

The TRIP is a financial incentive managed by the CNC, offering a tax rebate of 30%, and up to 40% for VFX-heavy fiction works, on production expenditures incurred in France. This programme specifically targets foreign-initiated projects in fiction and animation, reinforcing France's attractiveness as a filming destination ([CNC, 2022b](#); [CNC, 2023b](#)).

Theatre broadcasting and digital infrastructures

IF Cinema

IFcinéma is a VoD platform run by the Institut français which allows for a wider distribution of French films thanks to the VoD catalogue made available (Int. Fr6). This platform with a catalogue of 3000 titles allows 20,000 screenings per year in 180 different countries ([IFcinéma, n.d.](#)). The IF catalogue includes films for which the Institut français has acquired the rights and mainly French film productions or the majority French co-productions (Int. Fr4). This platform is intended for non-commercial public screenings and is aimed at members of the French cultural network. Private screenings, even non-commercial ones, are not allowed ([IFcinéma, n.d.](#)).

French Cultural Network's digital facilities

Receiving the support from MoFA, the CNC, and Unifrance, the Institut français seeks to modernise and equip the screening rooms in French Institutes around the world. So far, 71 cinemas in 47 countries have been digitised, ranging from Europe to Asia, Africa and America, and enabling over 11,000 screenings a year ([Institut français, n.d.g](#)). This funding allows the Institut français to screen French films and thus promote French culture and language abroad.



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2.2 Spain

2.2.1 Objectives

As stated in the preamble of [Law 55/2007](#), also known as Film Law (Ley del Cine), the film and audiovisual industries constitute a key sector of Spanish culture and economy, contributing to technological innovation, economic growth, job creation and the safeguarding of cultural diversity. The law aims to promote and develop the production, distribution and exhibition of cinematographic and audiovisual works within the context of the defence and promotion of cultural identity and diversity. In this regard, the reference to the UNESCO CDCE (2005) and the Universal Declaration of Linguistic Rights (1996) is particularly noteworthy. One key objective of the law is promoting the Spanish film industry, which includes provisions for financial support, subsidies, and tax incentives for film production. It also regulates other essential aspects impacting the international dimension of Spanish and European films, such as promoting European and Ibero-American cinema abroad and the valorisation of the country's cultural and linguistic diversity.

At the state level, the Ministry of Culture, through the Institute of Cinematography and Audiovisual Arts (ICAA), is responsible for fulfilling state functions as determined by the law. The ICAA, set up in 1984, is the main body in charge of policy on promoting and supporting the Spanish film industry. It has an independent legal status although it is linked to the State Secretariat for Culture of the Ministry of Culture. Its objectives include promoting Spanish cinema in the international market, enhancing the competitiveness of the industry, fostering co-productions and facilitating the accessibility and distribution of Spanish films. In its efforts to promote audiovisual culture abroad, the ICAA facilitates the presence of Spanish cinema at festivals worldwide and organises screenings and cycles to showcase films more broadly in strategic locations in partnership with Autonomous Communities ([Compendium of Cultural Policies and Trends, n.d.](#); [Ministerio de Cultura, n.d.a](#)). This has to do with the fact that Spain has a devolved administrative and political organisation that allows shared competencies and general cultural responsibilities among the central government, Autonomous Communities and, at the local level, municipalities and provinces¹. For instance, at the sub-state level, there is legislation designed to support the film industry, including its international dimension. This is the case in Galicia ([Law 6/1999](#)), Valencia

¹ For further information about Spain's cultural policy system, please see the [Compendium of Cultural Policies & Trends Database](#).



([Law 1/2006](#)), Catalonia ([Law 20/2010](#)), the Balearic Islands ([Law 5/2013](#)) and Andalusia ([Law 6/2018](#)), for instance.

While the current legislation remains [Law 55/2007](#), as previously mentioned, the Spanish government proposed in June 2024 a Film and Audiovisual Culture Draft Law (Proyecto de Ley del Cine y de la Cultura Audiovisual). This draft bill, under discussion,² aims to update Spain's legislation for the film and audiovisual industry. It aims to provide a comprehensive and coherent legal framework that understands the new dynamics of the sector, establishes instruments that address the needs, developments, and challenges of creators, industry, and audiences, and accompanies the evolution of the sector in the future. The main objective of this new law, which has not been without controversy ([DLA Piper, 2024](#)), is to promote and foster the audiovisual industry, conserve and disseminate cultural and linguistic heritage, and advance technological development. The international dimension of the Spanish film industry is primarily addressed through support programmes for the internationalisation of audiovisual productions. The seventh section of the draft bill includes, on the one hand, support for the participation of audiovisual works in internationally renowned festivals, awards, markets, labs and industry events and, on the other, new grants enhancing and promoting the international distribution of films and other audiovisual productions.

A plan is currently being implemented, the 2025-2028 Cultural Action Plan for Internationalisation (Plan de Acción Cultural Exterior 2025-2028) of the Ministry of Culture, to bolster the internationalisation of Spanish cultural and creative productions and facilitate the dialogue on Spanish culture within the broader context of global culture. The programme outlines priorities and objectives for international cultural engagement, structured around three strategic areas that reflect the government's commitment to promoting cultural rights, supporting culture as a global public good, fostering cultural diplomacy and the international presence of Spanish creative industries. The first strategic area, 'Cultural Rights and Access to Culture as a Global Public Good,' focuses on promoting cultural rights globally in collaboration with international partners. Within the field of cultural rights promotion and coordination, the plan highlights Spain's involvement in programmes such as Ibercultura Viva, Creative Europe and the Cultural Compass by the European Commission. For the second strategic area, 'International Relations and Cultural Diplomacy as a Tool for Peace', Spain commits to strengthening international cultural relations with

² For the parliamentary evolution of the bill follow this [link](#).



strategic partners to enhance Spain's cultural presence and foster international exchange through its artistic works. Finally, the third area, 'Promotion and Internationalization of Cultural and Creative Industries', aims to enhance the competitiveness and global reach of Spain's cultural and creative industries. Spain will establish new co-production agreements with countries like Canada, Brazil, South Korea and Chile and expand grants and subsidies to support the international presence of Spanish productions, with support for translation, distribution and promotion ([Ministerio de Cultura, 2024](#)).

2.2.2 Actors

Even though a range of distinct public institutions at both state and sub-state levels contribute to the international promotion of the Spanish film industry, the Institute of Cinematography and Audiovisual Arts (ICAA) remains the primary entity responsible for supporting the film industry. Another key institution in the promotion of Spanish films abroad is ICEX, a publicly owned business-oriented agency created in 2011 and linked to the Ministry of Economy, Trade and Business, which provides support for audiovisual companies seeking international growth ([Audiovisual from Spain, n.d.](#)).

Several other organisations and programmes contribute, at the state level, to the global expansion of Spanish cinema while fostering the dissemination of Spanish culture and preserving its film heritage. In other words, public entities involved in international cooperation and cultural diplomacy contribute to the global circulation of Spanish films and filmmakers as they advance cultural exchange abroad: Acción Cultural Española (AC/E), Instituto Cervantes, the network of embassies overseas and, to a lesser extent, the Spanish Agency for International Development Cooperation (AECID).

At the sub-state level, Autonomous Communities, including the autonomous cities of Ceuta and Melilla, have broad powers in matters of culture. Not all of them necessarily have organised their administration via specific departments since most have adopted mixed structures to jointly deal with education, sports, tourism and/or linguistic policy. Some have administrative structures that coexist with autonomous public bodies (the Catalan Government has a Department dedicated to Culture alongside the ICEC). In any case, the involvement of regional governments in the promotion of cinema has been traditionally more substantial in those communities that first



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obtained administrative autonomy and have their own language³: Basque Country, Catalonia and Galicia. For reasons of length, this is the reason why this report references them explicitly without disregarding or underestimating other regional contexts such as Andalusia's, the Canary Islands' and the one from the Valencian Community.

In other words, there have also been other Autonomous Communities with significant investment commitments and specific management structures ([Newman-Baudais, 2011](#)). Valencia, for example, has the Valencian Institute of Culture (Institut Valencià de Cultura - IVC). This public entity that depends on the Department of Education, Culture, Universities and Employment of the Valencian Government, focuses on the development and execution of cultural policies and actions in terms of creation, exhibition, knowledge, guardianship, promotion, production, conservation, restoration, study, research, promotion, and dissemination of films and audiovisual arts and other artistic manifestations ([Institut Valencià de Cultura, n.d.](#)). Moreover, the IVC has an Audiovisual and Cinematography Directorate Department. Notably, in early 2023, at the initiative of the government, the Office for the International Promotion of the Valencian Audiovisual Industry was created under the management of the Valencian Audiovisual Academy. Among its functions are: organising events to support the Valencian audiovisual sector at the state and international level, promoting the sector in international and state markets and labs, providing advice for the internationalisation of Valencian audiovisual projects, supporting and creating travel grants and accreditations as well as organise training courses on the internationalisation of companies ([Institut Valencià de Cultura, 2023](#)).

It is worth noting that there are 47 film commissions and offices throughout the country, at both regional and local levels (Catalunya Film Commission and Barcelona Film Commission; Film Madrid and Madrid Film Office; Illes Balears Film Commission and Ibiza Film Commission, etc. ([Film Spain Commission, n.d.](#)). All are dedicated to promoting their territories as prime audiovisual production locations. Spain also participates in the CineRegio European network of regional film funds thanks to the participation of the Andalusian Agency for Cultural Institutions, the Basque

³ The language issue is an important one in Spain by virtue of the recognition both in the Constitution of 1978 and in the Charters of 7 Autonomous Communities with their own languages: Asturias, Catalonia, the Basque Country, Galicia, the Balearics, Valencia and Navarre. In these territories, the local language and Castilian coexist as official languages and a system of bilingual education operates or, at least, regional governments assure its protection and promotion. This recognition is a cornerstone of Spanish cultural diversity. For an introduction to the Spanish cultural policy system see Villarroja and Ateca-Amestoy's contribution to the [Compendium of Cultural Policies & Trends Database](#). For a historical account of cultural policies in Spain see for example [Rubio Aróstegui, Rius-Ulldemolins and Martínez Illa \(2014\)](#).



Department of Culture and Linguistic Policy, Canary Islands Film, the Catalan Institute of Cultural Companies, Mallorca Film Commission & Fund, and the Community of Madrid ([Cine Regio, n.d.](#)).

Given the number of organisations involved in international promotional efforts, coordination has often been a point of concern. That being said, although interviewees acknowledged that there's always room for further improvement, the general consensus was that the exchange of information works reasonably well and that complementarity is taken into account when making decisions, ensuring that all stakeholders work towards the same objectives. The 'Spain in Focus' initiative in the Berlinale's EFM 2025, supported by ICAA, ICEX and Instituto Cervantes, constitutes a noteworthy example ([Ministerio de Cultura, 2025](#)).

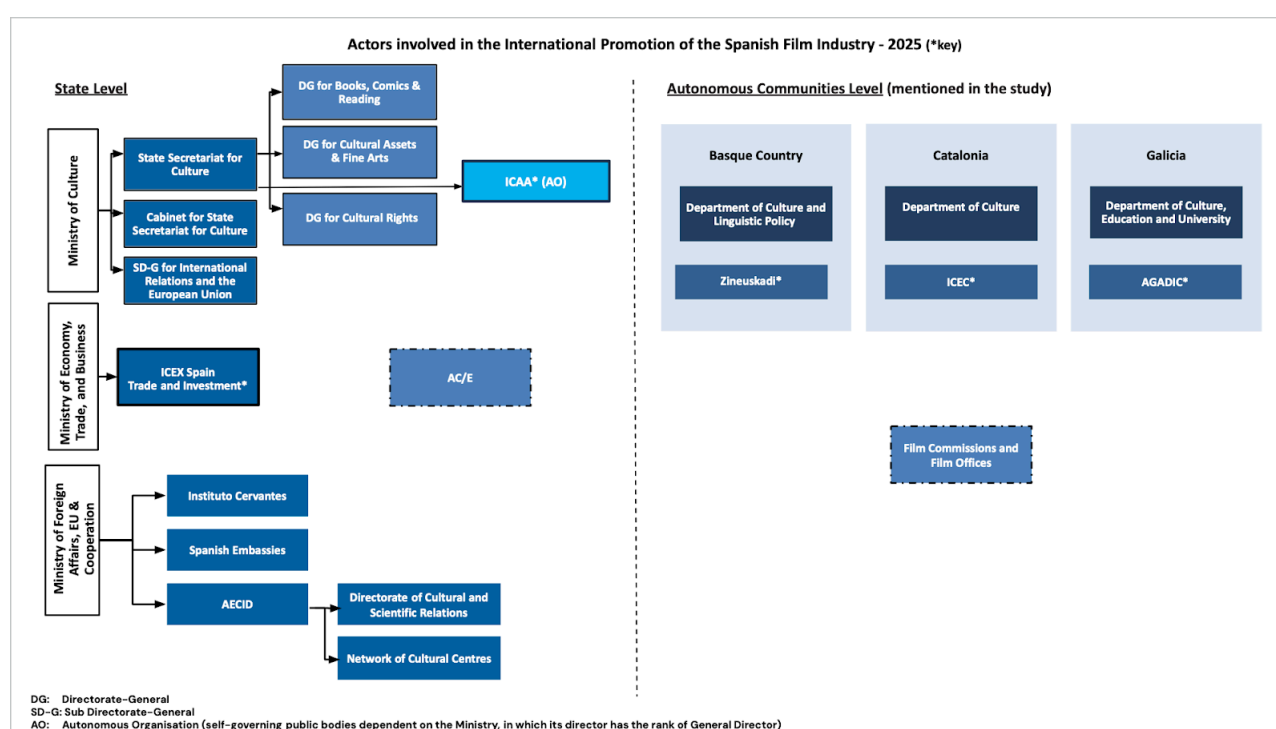


Figure 20 - Spanish Film Industry: International Promotion Actors Map

State level institutions

ICAA - Instituto de la Cinematografía y de las Artes Audiovisuales

As previously mentioned, ICAA, an autonomous entity linked to the Ministry of Culture, is the primary institution responsible for formulating strategies to support the production, distribution, and promotion of audiovisual works. It promotes independent production and engages in R&D activities within the realm of film and audiovisual creation. It is also one of the key agencies responsible for



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the international promotion of the Spanish film industry. It has a department dedicated to promotion and international relations which is in charge of diffusing Spanish cinema and audiovisual works domestically and internationally. Some of its main activities involve providing assistance to national and international film events and festivals held in Spain, supporting the participation of Spanish films in prestigious international festivals and organising events that showcase Spanish cinema in various countries. In addition, it handles negotiations for international co-production agreements and represents the Spanish cinema and audiovisual sector in European programmes and organisations such as MEDIA, Eurimages, and Eureka Audiovisual, as well as the Ibero-American cooperative programme 'Ibermedia' ([Ministerio de Cultura, n.d.a](#)).

ICEX - España Exportaciones y Inversiones

ICEX Spain Trade and Investment (ICEX) is dedicated to promoting the international expansion of Spanish businesses, strengthening global competitiveness, fostering economic growth and attracting investments. As part of its broad mandate, ICEX has been actively supporting the internationalisation of the audiovisual sector for many years. It supports audiovisual companies' international expansion through its ICEX Next programme, providing comprehensive assessment throughout its process ([ICEX, n.d.](#)). In addition, working with the ICAA under the Audiovisual from Spain brand, it participates in international film markets, including within its stands Spanish companies selected through public tender. The Audiovisual from Spain brand and its associated sub-brands, such as 'Cinema from Spain', 'Docs from Spain', 'Animation from Spain', and 'Games from Spain', as well as the 'Shooting in Spain' initiative, carry out several other communication and public relations initiatives aimed at strengthening the presence of Spanish audiovisual productions in prestigious international settings.⁴ These efforts aim to raise the profile and global recognition of Spanish audiovisual productions ([Audiovisual from Spain, n.d.](#)).

AC/E - Acción Cultural Española

The AC/E State Company (Sociedad Estatal de Acción Cultural Española) is a public institution set up in 2010, dedicated to promoting and showcasing Spanish culture and heritage both within Spain and internationally. It supports a wide range of activities, including exhibitions, conferences, cinema, theatre, music, audiovisual productions, and initiatives that foster the mobility of professionals and creators. One of its key initiatives is the PICE Programme (Programa AC/E para la Internacionalización de la Cultura Española) which focuses on facilitating the international

⁴ The breakdown of all of ICEX initiatives can be found on its annual reports.



presence of the Spanish creative and cultural sector through individuals. It supports the participation of Spanish and Spain-based artists and creators in international cultural events. PICE provides three types of support: 'Visitantes', 'Movilidad' and 'Residencias'; respectively, aiming at visiting artists, mobility and residencies. While none of the initiatives is specific to the cinematographic industry, film professionals often benefit from them ([Acción Cultural Española, n.d.](#)).

Instituto Cervantes

The Cervantes Institute (Instituto Cervantes) is a self-governing body set up in 1991 to advance the global teaching, study, and dissemination of the Spanish language while fostering the international promotion of Hispanic culture. It operates under the orbit of the Ministry of Foreign Affairs, EU, and Cooperation, collaborating with prestigious national and international organisations, both public and private and acting as a cultural ambassador for Hispanic cinema worldwide. The Institute primarily carries out this mission through the screening of film cycles in collaboration with prestigious film festivals and top film institutions. It presents thousands of films annually to audiences abroad in its physical theatres and digital platforms. Additionally, it organises exhibitions, publishes film catalogues, and runs its virtual film club, 'Cita con el Cine', contributing to the global visibility and recognition of Spanish films ([Instituto Cervantes, n.d.](#)).

AECID - Spanish Agency for International Development Cooperation

Operating also under the umbrella of the Ministry of Foreign Affairs, EU, and Cooperation, the Spanish Agency for International Development Cooperation (Agencia Española de Cooperación Internacional para el Desarrollo, AECID) contributes subsidiarily to the international promotion of Spanish cinema. Through its Directorate of Cultural and Scientific Relations, AECID manages an extensive programme of cultural activities to promote Spanish culture across the globe. The agency's mission is to support the internationalisation of Spanish cultural industries, giving a prominent place to cinema, by facilitating the participation of Spanish creators, artists, and professionals in major international events. One of AECID's key initiatives in this effort is its specialised film library, which serves as a cultural resource, making its collection available to Spanish embassies, the AECID Network of Cultural Centres (Red de Centros Culturales de España en el exterior - Red CCE), and Instituto Cervantes' locations worldwide ([Agencia Española de Cooperación Internacional para el Desarrollo, 2024](#)).



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Sub-state level institutions

As explained, Autonomous Communities have competencies in the field of culture. This has led some, but not all, to exert significant authority over the audiovisual sector. In the case of those with their own language, different institutions are actively involved in safeguarding these languages and strengthening regional identity, and this translates into the support of locally produced films and their international visibility. Catalonia, Galicia, and the Basque Country are three examples of the former.

Catalonia

The Catalan Institute of Cultural Companies (Institut Català de les Empreses Culturals - ICEC) is an administrative body related to the Catalan Government's Department of Culture (Directorate General of Innovation and Digital Culture), responsible for promoting and developing the cultural sector in Catalonia. ICEC not only focuses on promoting Catalan culture but also on strengthening the Catalan audiovisual industry allocating funds to support the entire value chain. The ICEC also continues to back the 'Catalunya Media City' project, an audiovisual and video game hub aimed at becoming a major reference in southern Europe ([Institut Català de les Empreses Culturals, n.d.a](#)).

More specifically, the ICEC, through the Audiovisual Area, fosters the internationalisation of the cinematographic industry through the brand Catalan Films, which is dedicated to promoting Catalan content internationally, providing tools and resources to support the internationalisation of Catalan professionals and offering materials and information about the Catalan cultural sector to international industry professionals. The Audiovisual Area also coordinates the Catalonia Film Commission, a service that aims to promote the Catalan territory as a set for audiovisual productions and advise professionals interested in filming in Catalonia ([Institut Català de les Empreses Culturals, n.d.b](#)). In addition, the ICEC has a tool to collect and generate indicators on Catalan Culture since 2010: the Observatory of Cultural Enterprises (Observatori de les Empreses Culturals).

Basque Country

Since the Basque Government gained responsibility for film through the Statute of Autonomy in 1979, it has developed policies to support audiovisual production in Euskadi. The Government's Department of Culture and Linguistic Policy (Kultura eta Hizkuntza Politika Saila) has strengthened the sector through initiatives that include providing interest-free loans and credit lines to boost production, competitiveness, and employment. Additional support is provided for the creation,



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promotion, and advertising of audiovisual works, as well as for new media and the promotion of Basque-language cinema via programmes like 'Zinema euskaraz' and 'Zinema streaming'. The department also aids exhibitors with programming and digital transition and oversees the Basque Cultural Observatory (Kulturaren Euskal Behatokia), a centre for information, documentation, and research on cultural matters that facilitates the dissemination of studies and research related to Basque culture ([Observatorio Vasco de la Cultura, n.d.a](#)).

In terms of internationalisation efforts, the key actor is **Zineuskadi**, a non-profit organisation established in 2011 by the Department of Culture and Language Policy and key independent audiovisual producers' associations, EPE-IBAIA and APIKA. Since 2014, the Basque public service media Euskal Irrati Telebista (EITB), the San Sebastian Film Festival, the Basque Film Archive Foundation and the Basque Association of Movie Theatres are also members. Zineuskadi's efforts focus on building national and international professional networks, defending the diversity of European audiovisual heritage, and promoting works in non-dominant languages or those with less commercial potential. Zineuskadi manages several key initiatives, such as the Zinema Euskaraz programme, the Europa Creativa Desk Media Euskadi office, and the Glocal Cinema project ([Zineuskadi, n.d.a](#)). The organisation offers various funding programmes, including grants for cinema venues and film promotion and advertising, all aimed at enhancing the visibility and competitiveness of Basque cinema both within Spain and internationally. Moreover, Film Basque Country was created as a brand to represent all film commissions from the Basque Country abroad and serve as the primary point of contact between private organisations and these institutions. The primary purpose is to promote Basque Country as a film production destination and support the promotion and distribution of Basque films in the international market ([Zineuskadi, n.d.b](#)).

Galicia

The Galician Agency for Cultural Industries (Axencia Galega das Industrias Culturais (AGADIC), was established in 2008 as a public agency within the Galician Government's Department responsible for supporting and advancing the cultural sector, including audiovisual industries (Department of Culture, Education and University). Its main initiatives feature annual grants for cultural industries and strategies to enhance the domestic market while promoting the international visibility of Galician culture.



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The agency supports the internationalisation of Galician audiovisual productions, fostering their participation in global markets and festivals. It is actively involved in initiatives that aim to showcase and distribute Galician films and audiovisual works beyond Spain, enhancing their visibility on the global stage ([Axencia Galega das Industrias Culturais, n.d.a](#)). Through the Films from Galicia and Shorts from Galicia brands, the agency promotes the distribution and marketing of Galician audiovisual products on the international market.

Main non-governmental actors

Spain Film Commission

Spain Film Commission is a non-profit association founded in 2001 that coordinates the 47 existing film commissions and film offices in Spain. It functions as a network in collaboration with local authorities, Autonomous Communities, and other public and private entities. The Commission's main objective is positioning Spain as an attractive shooting destination for audiovisual productions. Other aims include promoting the opening of new international markets and collaborating with public administrations to establish an efficient tax incentive system. The complete list of members of the network is [here](#).

Clusters

Regional networks of audiovisual companies have emerged across different Autonomous Communities to enhance the local film industry's competitiveness, innovation and internationalisation efforts. These initiatives receive public support and financial aid primarily from regional and local governments but sometimes from national institutions and EU programmes too. In terms of international promotion, the clusters support their members in expanding to global markets and, in the case of regions with their own language, help to promote it. Each Autonomous Community mentioned in this report has a network with these characteristics.

The Catalan Audiovisual Cluster (Cluster Audiovisual de Catalunya) is an association launched in 2013 that gathers audiovisual companies, fostering collaboration and innovation within the sector. Its goal is to strengthen Catalonia's audiovisual industry by promoting synergies, improving competitiveness, and expanding the market for its members. The cluster also works on training, research, and advocacy to enhance the industry's presence both nationally and internationally ([Cluster Audiovisual de Catalunya, n.d.](#)). In Galicia, the Galician Audiovisual Cluster (Cluster Audiovisual Galego), created in 2003, is an organisation that supports and promotes the



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audiovisual sector in Galicia. It brings together various entities, including production companies, distributors, and other professionals. The cluster's primary goal is to strengthen the sector through collaboration, foster innovation, enhance competitiveness, and boost international presence ([Cluster Audiovisual Galego, n.d.](#)). Eiken has been the association based in the Basque Country that, since 2004, brings together companies from the audiovisual sector. Its primary aim is to promote collaboration among industry professionals and boost the global competitiveness of Basque audiovisual production. Eiken also works on innovation, the internationalisation of the sector, and the development of strategic projects to strengthen the audiovisual industry in the territory ([Eiken Cluster, n.d.](#)).

In any case, the Network of Spanish Audiovisual Clusters (Red de Clústeres Audiovisuales de España - Red CAU) has emerged as a network of eight audiovisual clusters representing a total of 700 companies and institutions aimed at fostering innovation, promoting collaboration between companies, and enhancing the national and international presence of the Spanish industry. The network supports R&D projects, attracts international operators, and represents the industry to public and private institutions. It also promotes best practices, organises joint training and events, and helps navigate sector regulations ([Red Española de Clústeres Audiovisuales, n.d.](#)).

Academia de las Artes y las Ciencias Cinematográficas

The Academy is a non-profit organisation comprising film professionals committed to promoting Spanish cinema. Its primary objectives include advancing the industry, advocating for its members, and conducting in-depth analyses of the Spanish film landscape. The Academy plays a pivotal role in enhancing the visibility and influence of Spanish cinema both domestically and internationally. In addition to organising the renowned Goya Awards, which recognise excellence in Spanish filmmaking, the Academy actively promotes collaboration among its members and with global institutions. It bridges cultural gaps and fosters international exchange by organising screenings of Spanish films selected for international awards in collaboration with Instituto Cervantes and by showcasing foreign films at its headquarters. Moreover, by selecting Spain's official entries for prestigious awards such as the Oscars, the Academy further strengthens the global presence of Spanish cinema ([Academia de las Artes y las Ciencias Cinematográficas de España, n.d.](#))



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2.2.3. State-funded programmes

As previously stated, the current legal framework for the Spanish film industry is established by Law 55/2007; this legislation forms the foundation for the current system and defines the type of financial aid available to support programmes. Beyond the state level, film promotion is supported by other initiatives, such as regional grants and funding from different public sources, including regional administrations, municipal governments and international entities. Other important initiatives have emerged due to the support of European funds. One of the most significant ones is the Spain Audiovisual Hub of Europe, launched in 2021 as part of the Spain Digital 2026 Agenda to position the country as a leading European audiovisual hub and boost growth in the sector ([Presidencia del Gobierno de España, 2021](#)).

Programmes funded by ICAA

According to what is stated in the 'Informe 2024 Spain AVSHub' report about the audiovisual sector ([Secretaría de Estado de Telecomunicaciones e Infraestructuras Digitales, 2024](#)), the ICAA has seen a remarkable growth in government support for the film industry in Spain, with a 40% increase in public funding since 2019. In 2023, €106,000,000 were assigned to the sector, the highest figure on record to date and a clear reflection of the effort to reactivate an industry that suffered a 45% loss in its revenue due to the COVID-19 pandemic. Nonetheless, in this context, the vast majority of funding allocated through competitive calls is assigned to production activities. Few are the ones that support internationalisation: funding for the participation and promotion of Spanish films in international festivals, grants for the distribution of films from Spain, Autonomous Communities and Ibero-America, and support for the organisation of festivals or awards in Spain.

Despite this, in an attempt to boost the international presence of Spanish cinema, ICAA has recently introduced the Internationalisation Plan 2024-2026, a strategic framework designed to promote the participation of Spanish productions in international festivals and markets and assist the sectors involved in the distribution of Spanish films abroad (Orciari, 2025). Alongside this, Spain was selected as the 'Country in Focus' in the EFM at Berlinale 2025 which led ICAA and ICEX to select professionals for various EFM programmes, including the Producers Showcase and the Visitors Programme both focused on co-productions opportunities. The participation of the 24 professionals selected for these initiatives were covered by ICAA. Beyond that, ICAA offers annual grants to assist producers whose films have been selected for international film festivals, covering costs such as participation fees and promotional activities. In 2023, the budget allocated for these



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grants was €800.000, constituting 0.51% of the total aid budget. One hundred twenty-six films were showcased at 76 festivals during that year ([Ministerio de Cultura, 2023](#)). ICEX and the ICAA also organise industry events and maintain booths at major film markets and festivals to promote Spanish cinema and boost sales of Spanish films.

Distribution grants⁵ are also available, although the financial support offered is limited, particularly compared to production grants. There are two initiatives, the Support Programme for International Distribution of Spanish Cinematic Films, backed by the Next Generation EU (NGEU) Funds, designed to boost the international sales and distribution of Spanish films internationally, as well as the Support Programme for the Distribution of Feature Films and Collections of Short Films, Spanish, European, and Ibero-American, that promotes the distribution of feature films and short film compilations, mainly from European and Ibero-American countries in authorised cinemas across Spain (films must be in their original version to receive support). The budget allocation for these two grants in 2023 was €1,000,000⁶ and €4,000,000, respectively, representing 4.42% of the total budget ([Ministerio de Cultura, 2023](#)). It is worth noting that ICAA also offers a selective grant for feature film production based on project proposals, with the goal of funding projects that hold significant film, cultural or social value, including documentary projects, those featuring emerging filmmakers, and experimental productions. Furthermore, a recent amendment ([Royal Decree 1090/2020](#)) expanded the concept of so-called 'difficult audiovisual works'⁷, including films made exclusively by female directors, low-budget animated films, documentaries, and co-productions with Ibero-American countries, which often struggle for screen presence. While these initiatives are not directly related to international promotion, they have been instrumental in fostering new creative voices and storytelling approaches as well as in establishing a distinctive and evolving international presence for Spanish cinema. This is a fact that can be confirmed by the increasing international presence of such productions at major film festivals.

There are 45 film festivals in Spain. The nature of certain festivals effectively contributes to the promotion and internationalisation of the film industry (Heredero, 2019), with prominent funding

⁵ A full list of grants available through ICAA can be found [here](#).

⁶ The €1,000,000 grant for international distribution was allocated in 2023 but partly executed in 2024, which is why it appears in the 2023 figures. Of this amount, only €344.595,58 was executed.

⁷ The term "difficult audiovisual works" comes from EU regulations on state aid for film and audiovisual productions, specifically Communication 2013/C332/01 and Article 54 of Regulation (EU) No 651/2014. These allow member states to classify certain projects as "difficult" and grant them higher public funding - up to 100% of eligible costs. In Spain, short films receive 75 - 85% of costs, new filmmakers, co-official language films, and works by disabled directors up to 80%, films by female directors, culturally significant works, documentaries, and low-budget animated films up to 75%, and Ibero-American co-productions up to 60%.



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hubs such as Málaga and San Sebastián playing a significant role. Other festivals fostering international outreach include Sitges (Catalonia), Festival Internacional de Cine Independiente de Ourense (Galicia) and the Ibero-American Film Festival of Huelva (Andalucia). State aid for organising prestigious film festivals and events held in Spain is provided through ICAA, but sub-state institutions and regional grants also play an important role. These events must primarily focus on showcasing Spanish, European, and Ibero-American films, including documentaries, animations, and short films to be considered. Each year, a specific budget is allocated for this grant, which was €1,977,750 in 2023, representing 1.25% of ICAA's total budget ([Ministerio de Cultura, 2023](#)).

In any case, as the chief actor that brings together promotion and sales actions for Spanish cinema, the ICAA periodically organises co-production encounters and international promotion activities within the framework of the different festivals and markets (including screenings). It also publishes the catalogue 'Just Spainted: New Spanish Films to showcase films internationally'.

Programmes funded by ICEX

ICEX actively supports the international growth of Spain's audiovisual sector through the Audiovisual from Spain initiative, helping Spanish companies in film, television, animation, video games, and XR showcase their content globally. This umbrella brand works to promote Spanish talent and audiovisual productions at major international trade fairs, festivals, and networking events. Currently financed by the EU through the NGEU programme, it provides various promotional tools to support Spanish content in global markets, facilitating participation in key events like Marché du Film, Berlinale, Toronto International Film Festival, and others. It also organises networking activities that have become an annual staple. Within the Audiovisual from Spain umbrella, there is a specific brand dedicated to the film industry called Cinema from Spain ([Audiovisual from Spain, n.d.](#)). During the interviewing process a new initiative to promote Spanish films internationally was mentioned, [Spain where talent ignites](#) an ambitious campaign with the goal of enhancing the international image of the Audiovisual from Spain brand, promote the commercialisation of Spanish productions, increase the recognition of Spanish audiovisual work amongst international professionals and increase business opportunities for the sector in the global market. The campaign, which is in fact a short musical fashion film, was launched during the 2024 edition of the San Sebastian Film Festival and later showcased at International Market of Communications Programmes (MIPCOM), American Film Market and Busan International Film Festival.



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Another initiative supported by ICEX was the Spain Audiovisual Bureau, a service launched at the end of 2021 to further support the internationalisation of the Spanish Audiovisual sector and attract foreign film productions and investment, offering a service to centralise information for companies interested in working or investing in Spain, as well as for Spanish companies seeking to expand abroad. Financed by €20,000,000, under the umbrella of the Spain Audiovisual Hub of *Europe*, it offered detailed assistance within 48 hours on financing, including information about available grants, tax incentives, loans, and other state and regional support options. The Bureau also provided resources on professionals, such as regulations for foreign workers in audiovisual productions, visa requirements, and legal procedures. Furthermore, it included a registry of audiovisual service providers, a directory of companies, professionals, training institutions, and shooting locations ([AV451, 2025](#)). To further promote Spain's audiovisual industry internationally, two new guides - 'Who is Who. Animation from Spain' and 'Who is Who. Shooting in Spain' - were published, providing valuable information about Spain's audiovisual industry for international promotion. Since January 2025 the dedicated website of the Spain Audiovisual Bureau within the Spain Audiovisual Hub portal has been subsumed into ICEX's regular activities since the initiative ceased to exist.

PICE program

PICE is the programme for internationalising Spanish culture promoted by AC/E. Since 2013 it aims to encourage the presence of the Spanish cultural and creative sector abroad, mainly through its PICE Mobility initiative. This initiative seeks to foster international organisations to take Spanish creators, aid artists in foreign and national residency programmes and promote the exchange between national and international artists involved in these initiatives ([Acción Cultural Española, n.d.](#)). Between 2013 and 2023 the programme supported a total of 555 individual cinema projects ([Acción Cultural Española, 2024](#)).

Spain Arts & Culture

Spain Arts & Culture is an external cultural action programme of the Ministry of Culture that promotes Spanish culture in the United States by fostering artistic exchanges and strengthening cultural ties between the two countries. Its goal is to create opportunities for Spanish artists and institutions to engage with American audiences, drawing on their common Hispanic heritage. To achieve its mission, the programme works with American partners to build lasting cross-cultural



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connections across various disciplines, including cinema. The idea is to give emerging Spanish creators a platform to present their work in the United States ([Spain Arts & Culture, n.d.](#)).

Support from Autonomous Communities

All Autonomous Communities have some sort of cultural aid schemes comprising the audiovisual sector, though they vary in scale, some are limited, while others are more sophisticated. As referenced here, communities such as Catalonia, Galicia, and the Basque Country all have grants and initiatives to promote their locally produced films abroad. This subsection offers a non-exhaustive list of the key programmes/grants available in Catalonia through the ICEC and the Department of Culture, in the Basque Country in connection with Zineuskadi, and in Galicia via AGADIC. Several other grants exist, not addressed in this study, while significant to the development of the film industry within each region, do not directly contribute to the international promotion of Spanish or European films in the global market. It is essential to highlight that support can also come from certain institutions dedicated to promoting and preserving languages from Autonomous Communities. Within its support programmes and grants, they have initiatives for film and visual arts creators. This is the case of the Institut Ramon Llull or the Etxepare Euskal Institutua (Etxepare Basque Institute).

The Institut Ramon Llull is the public institution responsible for promoting the Catalan language and culture internationally. It is a consortium formed by the Government of Catalonia, the Government of the Balearic Islands, Barcelona City Council and Palma City Council. The institute has a grant to cover the expenses for subtitling audiovisual works produced and/or co-produced in Catalonia (by a production company based in Catalonia) to promote Catalan cinematographic creation abroad ([Institut Ramon Llull, n.d.](#)). Etxepare is an institution established by the Basque Parliament to promote the international visibility and presence of the Basque language, Euskera, and contemporary Basque creation. Its goal is to foster international cooperation and facilitate exchange and communication among creators, professionals, agents, and institutions. The Institute grants individuals, filmmakers and industry professionals to support their participation in international film festivals when selected to present or represent a film.

Additionally, the existence of bilateral forums and targeted co-production funds must be outlined. Although some of those deployed in Latin America in the early and mid-2000s have not been continued (Co-Production Fund Brazil - Galicia or Raíces Fund with Argentina, supported by some Autonomous Communities; [Newman-Baudais, 2011](#)), the Galician Government currently supports,



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for example, the Foro Luso-Gallego de Creatividad y Coproducción in partnership with the Portugal Film Commission. This co-production forum aims to enhance cross-border cooperation and provide a platform for audiovisual professionals from Galicia and Portugal to explore co-production opportunities. During the last edition that took place in November 2024 more than a hundred representatives of 52 Galician and Portuguese companies met to explore collaboration opportunities ([Xunta de Galicia, 2024](#)).

Catalonia

Grants

In 2023, the ICEC allocated €37,192,607.44⁸ to promote the Catalan audiovisual industry throughout the entire value chain, from the development of projects to their production, promotion, distribution and exhibition ([Institut Català de les Empreses Culturals, 2023](#)). These funds are supplemented by support from the Ministry of Culture and grants from international bodies such as MEDIA, Eurimages, and Ibermedia. ICEC offers various programmes⁹ that, in different ways, support the international promotion of the film industry. One such programme is a grant to support the production of feature films in an international co-production where the Catalan contribution is minor. The programme seeks to promote professional and creative exchange between Catalonia and third countries.

Other grants include an initiative to support audiovisual companies in their internationalisation efforts, specifically to boost the commercialisation of audiovisual productions. Two main initiatives are currently in place: one involves internationalisation efforts by independent audiovisual production companies aimed at promoting audiovisual works at any stage of production or post-production, while the other focuses on initiatives by independent distribution companies, which must be involved in export activities, seeking to market a catalogue of audiovisual works at any stage of production or post-production. There is also a grant to support the organisation of high-impact audiovisual festivals and events in Catalonia, further developing the audiovisual sector and featuring industry sections where companies and professionals with pre-selected projects can participate to improve their competitiveness and advance their plans. ([Generalitat de Catalunya, n.d.a](#))

⁸ A full budget breakdown can be found on a table on page 33 of the report "Memòria de l'Institut Català de les Empreses Culturals 2023", which can be found [here](#).

⁹ A full list of grants available can be found on the [Generalitat de Catalunya](#) website.



Furthermore, two grant programmes connect the promotion of language and audiovisual works. One supports feature films in their original Catalan or Occitan version, specifically the Aranese Variant. It aims to finance activities related to film distribution, advertising and promotion (known as prints and advertising, or P&A). While the other offers financial support for the dubbing and subtitling in Catalan of feature films produced or co-produced in Catalonia in an attempt to make these films accessible to international audiences and enhance the visibility and presence of Catalan audiovisual productions abroad. ([Generalitat de Catalunya, n.d.a](#))

Catalan Films

This is a key initiative coordinated by ICEC, focused on the internationalisation of Catalan audiovisual companies, aiming to strengthen their presence in global markets and festivals. Its mission is to enhance the participation of the Catalan audiovisual industry in international co-productions, distribution, and collaborations. Catalan Films supports Catalan films and talent at international festivals, acting as the official representative of the industry at major global events. In partnership with various collaborators, the initiative works to promote a diverse range of Catalan productions, including fiction films, documentaries, animation, television programmes, and short films. Through these efforts, it helps to expand the visibility and impact of Catalan audiovisual content on the international stage ([Catalan Films, n.d.](#)).

Basque Country

Grants

In the Basque Country, the primary grants¹⁰ for international promotion include a programme dedicated to supporting the marketing and promotion of Basque audiovisual productions, enhancing their dissemination and commercialisation within the Basque Autonomous Community and abroad. This initiative aims to preserve and increase the visibility of Euskadi's cultural identity in the international market. The other grant was established to support the participation of Basque audiovisual professionals in international fairs, markets, and industry events. Its main objectives are to aid the sector in expanding globally, foster co-productions, explore new commercial opportunities for cultural productions, and encourage networking and collaboration. Moreover, there is a grant for the exhibition sector to support cinema venues in the Basque Country in promoting community and Ibero-American cinema, particularly those films in Euskera ([Zineuskadi, n.d.c](#)).

¹⁰ A full list of grants available can be found on the [Zineuskadi](#) website.



Basque Audiovisual

Initiative operated by Zineuskadi and designed to promote the Basque audiovisual sector internationally, it aims to foster the visibility and presence of Basque productions and companies at global markets and festivals. It encourages international co-productions and distribution opportunities for Basque projects, as well as facilitating the participation of Basque audiovisual professionals at key industry events. Supported by the Etxepare Basque Institute and the Eiken Cluster, Basque Audiovisual is part of the broader BASQUE brand, which seeks to increase international awareness of Basque culture, creativity, and industries. This initiative helps establish long-term global partnerships and promotes cultural, academic, and creative industry exchanges worldwide ([Basque Audiovisual, n.d.](#)).

Galicia

Grants

AGADIC has established several grants¹¹ to support the international promotion of its local film industry, including a programme designed to facilitate the global promotion and commercialisation of Galician audiovisual projects. This programme assists Galician filmmakers and audiovisual companies in participating in specialised business forums, markets, and international film festivals outside of Galicia. These grants aim to enhance the visibility and distribution of Galician audiovisual works (such as films, documentaries, and series) in key international markets. Additionally, there is an initiative that supports the organisation of professional film festivals in Galicia that is deemed crucial to the sector. The main objective of this initiative is to fund festivals that make a substantial contribution to both the local and international promotion of the audiovisual industry. Furthermore, a grant has been established to strengthen the Galician audiovisual sector by supporting the production and co-production of audiovisual projects in Galicia. This grant covers a range of costs, including those associated with film production, translation, dubbing, distribution, and promotion ([Axencia Galega de las Industrias Culturales, n.d.b](#)).

Films from Galicia

Films from Galicia is a brand created by the Galician Government (Xunta de Galicia) is part of the programme to internationalise Galician audiovisual content. Its primary objective is to promote the region's latest film and television productions abroad and enhance their visibility in major industry

¹¹ Further details of all available grants are available on the [Agencia Gallega de las Industrias Culturales](#) website.



markets, both in Spain and internationally. Every year, the brand releases an updated physical and digital catalogue in English, showcasing Galician productions and projects across various categories, including feature films, documentaries, animation, and TV series (short films are featured separately under the Shorts from Galicia label). Accompanied by a promotional video, the publication entitled 'Films from Galicia' highlights the growing strength of Galician audiovisual industries while preserving the region's unique cultural values ([Axencia Galega das Industrias Culturais, n.d.c](#)).

Additional support

Spain Audiovisual Hub of Europe

Since the COVID-19 pandemic, the audiovisual sector was given strategic status by the Government of Spain under the umbrella initiative España, Hub Audiovisual / Spain Audiovisual Hub of Europe, as a way to help transform the country into, precisely, the main audiovisual hub of Europe. A total of €1,600,000,000 of public investment was scheduled for the 2021-2025 period funded through the General State Budget and EU programmes, primarily the European Recovery and Resilience Fund, the European Regional Development Fund, and the Creative Europe Programme (2021-2027) ([Gobierno de España, 2024a](#))¹². Its main objectives are to increase national audiovisual production, attract investment, develop new distribution channels, and enhance the economic sustainability of the sector. To achieve these goals, the initiative incorporates a range of funding programmes, grants, and collaborations with both public and private stakeholders.

A core element of this strategy is attracting and facilitating international audiovisual productions, which is why ICEX has been working closely with various government ministries, public administrations, and private sector players to strengthen Spain's global presence in the audiovisual industry, attract foreign investment, and contribute to the diversification of the Spanish economy. A key initiative in this effort is Shooting in Spain, an ICEX-led programme that provides incentives and logistical support for international filmmakers interested in filming in Spain.

¹² Funds have been channeled transversally through different government ministries. The Government has competencies to apply 45% of the funds, since another 45% is under the orbit of the Autonomous Communities and the remaining 10% in hands of local corporations ([Gobierno de España, 2021](#)).



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Another key initiative is Spanish Screenings XXL which received €4,200,000 for promoting Spanish cinema at international markets. In Spain, film screenings and the network of film commissions are key to boosting Spanish films' visibility. This is achieved through strategies like showcasing Spanish productions on dedicated websites, publications and international events to attract international filmmakers. Additionally, screenings have become vital market spaces that increasingly focus on promoting Spanish audiovisual content and international sales. This is the reason why they were rebranded as Spanish Screenings XXL within the Spain Audiovisual Hub of Europe framework (García Leiva, 2024). Relaunched as a dedicated programme, these types of activities have the involvement of the ICAA, ICEX, as well as the Malaga Film Festival and the San Sebastian Film Festival. The programme has four lines of work: Spanish Screenings Content, Spanish Screenings Financing and Tech, Spanish Screenings On Tour and Spanish Screenings 360.

The last two, Spanish Screenings on Tour and Spanish Screenings 360 provide direct support for the promotion of Spanish films abroad. Spanish Screenings On Tour seeks to improve and open new opportunities for the Spanish audiovisual industry at the international level; it also runs a series of travelling initiatives to achieve the sale and promotion of Spanish audiovisual productions in strategic territories. Spanish Screenings 360 runs throughout the year to promote the presence of the Spanish Screenings brand internationally, participating in events and creating informative content. In addition, it has a virtual platform for promotion and business ([Spanish Screenings. n.d.](#)).

REACT - EU Fund

In an attempt to address the economic and social impact of the COVID-19 pandemic, the EU launched in July 2020 the NGEU package, a recovery plan worth €750,000,000 designed to help Member States in rebuilding their economies and promote investments in green and digital transitions. A key instrument of this package is the Recovery and Resilience Facility (RRF), which allocates €672,500,000,000, and REACT-EU, which contributes €77,500,000,000 to reinforce EU cohesion policy with increased flexibility. Spain is set to receive around €140,000,000,000 through this broader initiative, primarily via the RRF ([Generalitat de Catalunya. n.d.b](#)). Under REACT-EU, Spain was allocated approximately €14,500,000,000. Of this, €10,000,000,000 went to the Autonomous Communities (€8,000,000,000 in 2021 and €2,000,000,000 in 2022 through ERDF and ESF), while the remaining €4,500,000,000 was distributed among national programmes



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([Ministerio de Hacienda, n.d.](#)). These funds were used to boost key sectors of the economy, including health, education, digitalisation, and notably, the audiovisual and creative industries.

One of the initiatives funded through the REACT-EU axis of the 2014-2020 FEDER operational programme, is the Hub Audiovisual - Industria Cultural Galega (Audiovisual Hub - Galician Cultural Industry) created for the period 2021-23 backed by a €9,600,000 investment. The programme was designed to address the pandemic's impact on the audiovisual sector, stimulate the economy, increase competitiveness and foster the growth of this strategic sector in Galicia. The budget was distributed across nine support lines, which included the development of the Galicia Film Commission initiative, the renewal of equipment and technological resources in cultural and creative businesses and industries, and the digitisation of audiovisual content from Galicia's Filmoteca Archives. The programme had several objectives, including attracting film productions to the region, developing audiovisual projects to support the sector's growth, promoting the screening of European and Galician films with limited visibility, providing equipment and resources for the cultural and creative industries to enhance their competitiveness in the global market, among other things ([Axencia Galega das Industrias Culturais, 2024](#)).

Another initiative focused on the audiovisual sector that was also funded through the REACT-EU is the 'Catalonia, a Driving Force for Audiovisual and Video Game Innovation in Southern Europe' ('Cataluña, motor de la innovación audiovisual y del videojuego del sur de Europa'). This programme received a €350,000,000 investment, aiming to create a cutting-edge hub for research and production in the audiovisual and digital content sectors, combining production facilities, business incubation, advanced training, and technological innovation to support both local and international markets. It aims to boost the growth of Catalonia's creative industries, attract global talent, and position the region as a leading digital and sustainable content production centre ([Generalitat de Catalunya, n.d.b](#)).



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2.3 Italy

2.3.1 Objectives

The current public policies concerning the Italian Film Industry (hereinafter 'IFI'), including its international promotion, were introduced or updated by the so-called Cinema Law (or, Legge Cinema), [Law n. 220 of 14 November 2016](#) ([Hoefert de Turégano, 2006](#)). Several legislations, decree-laws, and presidential decrees implemented these policies from 2016 onward.

The Cinema Law and the public policies originated therefrom are structured around four major pillars: **(1)** establishment of special funds for the IFI's development, **(2)** regulation of tax credits for the IFI, **(3)** regulation of automatic and selective contributions of the Italian State to the IFI, and **(4)** allocation of funds for the related investments in infrastructure, educational programmes, and other forms of promotion of cinematographic content.

The achievements of the Cinema Law were complemented with other legislative instruments adopted in 2020 under the state of emergency that the Italian State declared due to the global COVID-19 pandemic. These instruments introduced a new item to the Italian State's existing agenda concerning the audiovisual sector: supporting the recovery of the IFI from the adverse impacts of the global pandemic through novel policies and financial mechanisms. In this regard, Law n. 27 of 24 April 2020 not only created a fund of €28,000,000 allocated to film distribution but it also increased the tax credits, formerly introduced by the Cinema Law, from 30% to 40% ([Camera dei Deputati, 2022](#)). An additional €25,000,000 allocated to [Cinecittà](#), a key public institution associated with the [Ministry of Culture](#) (Ministero della Cultura) and focuses on the promotion of the IFI, to support the modernisation of its facilities and its international activities ([Law n. 27 of 24 April 2020](#)). Along the same lines, [Decree Law n. 18 of 17 March 2020](#) provided €252,000,000 in recovery funds, while the National Recovery and Resilience Plan (Piano nazionale di ripresa e resilienza - PNRR) allocated €300,000,000 for the IFI's development, including the opening of six new high-tech theatres ([Direzione Generale Cinema e Audiovisivo, n.d.a](#)).

In addition to these policies and legislative interventions, which have a direct or indirect impact on the IFI's international promotion from an economic perspective, the Italian State's policy agenda in action reflects a proactive effort to enhance the IFI's place in the global audiovisual market. These efforts can be divided into two categories in line with their target groups. The first category consists



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of the establishment of new initiatives and launch of websites or online databases, such as the '[Italy for Movies](#)' website and its [funding database](#), to help the internationalisation of the IFI by providing information on financial opportunities and other incentives targeting both Italian and international film professionals.¹³ The second category encompasses the various efforts, directly or indirectly,¹⁴ addressing the general public, including Italian and European cinema audiences and enthusiasts, by digitising cinematographic content (e.g. analogue films, film posters, other documents related to Italian cinema), enabling analogue and digital preservation of cinematographic content, digitally cataloguing such content, and facilitating public access to digitised content via online databases or on-site visits to museums and archives.

2.3.2 Actors

Public policies concerning the IFI in general, and particularly the internationalisation of the IFI, are developed collectively by several public authorities led by the Ministry of Culture ([Ministero della Cultura](#) - MiC). The MiC's organisational network consists of several other State actors that are involved in the internationalisation of Italian productions. Moreover, the MiC's endeavours are supported and reinforced by other ministries, State-bodies (e.g. agencies, diplomatic missions) and public institutions (e.g. cinema archives, cinema school and research centres).

It shall be noted that there are several private institutions, mostly associations, that help enhance the global visibility of Italian production through enabling online and on-site access to Italian audiovisual and cinematographic content as well as via organising events that attract the attention of global media and cinema professionals.

¹³ One of the major online databases concerning the IFI was developed by the "Italy for Movies" project, which launched a web portal, managed by Istituto Luce-Cinecittà, to attract the attention of national and international film producers to shoot movies in Italy while also presenting up-to-date information the national, regional and funds as well as the national financial incentives available to national and international film producers (Zambardino et al., 2018).

¹⁴ The indirect efforts in this context extend to the amendment of the Italian legislative framework, especially the copyright and media law frameworks, to implement several EU Directives (e.g. the InfoSoc, CDSM and AVMS Directive) to enable the digitization, online availability, online access and digital exploitation of Italian cinematographic content protected by copyright or by other measures. For more information on these legislative aspects, please refer to other deliverables of the REBOOT Project, such as D3.3 – Policy Recommendations and D4.2 – Coping Strategies of Creative Non-Mainstream Filmmakers and Codes of Best Practices.



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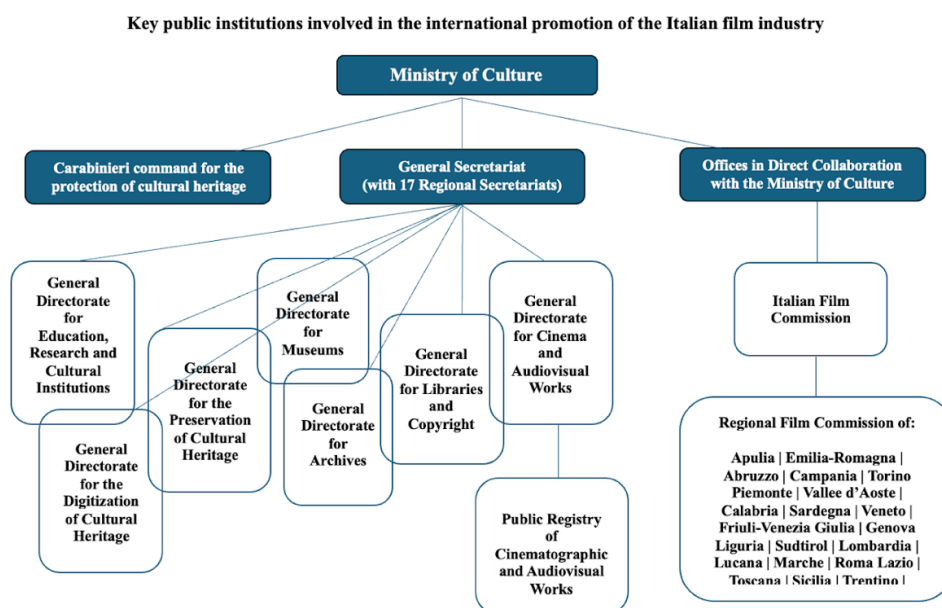


Figure 21 - Italian Film Industry: International Promotion Actors Map (i)

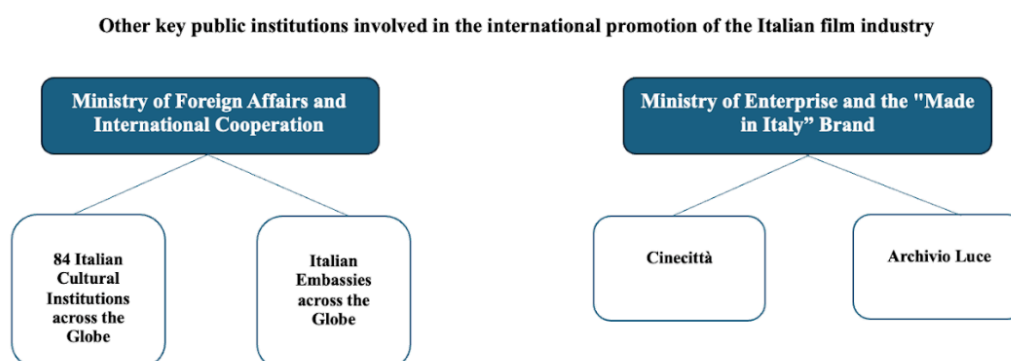


Figure 22 - Italian Film Industry: International Promotion Actors Map (ii)

State Ministries

Ministry of Culture and Its Organisational Network

Founded by [Decree-Law n. 657 of 14 December 1974](#), which was last amended by [Presidential Decree n. 441 of 29 December 2000](#), the [MiC](#)'s competencies are contoured by safeguarding cultural heritage and the environment.



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As consolidated by [Presidential Decree n. 123 of the President and the Council of Ministers of 24 June 2021](#), the MiC is organised into three secretaries: **(1)** the Carabinieri Commander for the Protection of Cultural Heritage (Comando Carabinieri Tutela del Patrimonio Culturale), **(2)** the Offices in Direct Collaboration with the Ministry of Culture (Uffici Diretta Collaborazione del Ministro), and **(3)** the General Secretariat, comprising seventeen Regional Secretariats and thirteen General Directorates, including the [General Directorate of Cinema and Audiovisual Works](#) (Direzione Generale Cinema e Audiovisivo - DGCA) ([DGCA, n.a.](#)). Among this institutional network, the DGCA requires special attention.

The DGCA was established by the Cinema Law (Legge Cinema) (Law n. 220 of 14 November 2016). It is one of the thirteen General Directorates of the MiC. It supports the creation, production, distribution and dissemination of cinematographic and audiovisual works. It also reinforces the modernisation of Italian cinema by facilitating the digitisation of cinematographic works and heritage as well as the adaptation of technical industries to technological change ([Direzione Generale Cinema e Audiovisivo, n.d.b.](#)). Furthermore, it contributes to defining Italy's position and its relations with the EU and other international institutions ([Direzione Generale Cinema e Audiovisivo, n.d.b.](#)). As a result, the DGCA has the capacity and competence to represent the Italian State in international organisations and forums, which fund and financially contribute to the EFI and IFI. Along the same lines, the DGCA is authorised to contribute to the activities concerning the selection of the projects to be granted special funds and financial support. It also supports vocational training and education in the field and carries out studies to substantiate policy-making in the cinematographic and audiovisual sectors ([Direzione Generale Cinema e Audiovisivo, n.d.b.](#)).

To perform these tasks, the DGCA consists of a Higher Council regulating filmmaking in the national context and a Commission for the classification of audiovisual works, which performs this task in light of [Legislative Decree n. 203 of 7 December 2017](#). Additionally, the DGCA holds a General Secretariat and a Technical Secretariat as well as several management units concentrating on certain specific matters, including but not limited to qualification and classification of cinematographic works, public registry of cinematographic and audiovisual works, coordination of the [Italian Film Commissions](#) (IFC); management of contributions for promotion and special projects; management of co-production agreements, taxation issues, and funds for international and minority co-productions and arthouse productions, and, notably, COVID-19 emergency funds ([Direzione Generale Cinema e Audiovisivo, n.d.b.](#)).



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Another public institution founded also by the Cinema Law (Legge Cinema) (Law n. 220 of 14 November 2016) is the [Superior Council of Cinema and Audiovisual Works](#) (Consiglio superiore del cinema e dell'audiovisivo). This Council works in collaboration with the DGCA. It advises and supports the development and implementation of sectoral policies and the preparation of general guidelines and criteria for the allocation of resources ([Direzione Generale Cinema e Audiovisivo, n.d.b](#)).

Ministry of Foreign Affairs and International Cooperation

[The Ministry of Foreign Affairs and International Cooperation](#) (Ministero degli Affari Esteri e della Cooperazione Internazionale - MiAECI) manages 84 Italian Cultural Institutes spread worldwide and an extensive network of Italian embassies and consulates abroad (Int. It4). Among the activities organised by these entities are a range of events dedicated to promoting Italian cinema (Int. It4).

Ministry of Enterprise and the Made in Italy

[The Ministry of Enterprise and the Made in Italy](#) (Ministero delle Imprese e del Made in Italy - MiIMII) play an important role in the international promotion of the IFI ([Agenzie ICE, 2021](#)).

The MiIMII (formerly known as the Ministry of Economic Development) supports the international distribution of Italian films, for instance, through economic incentives or the Agency of the Promotion Abroad and Internationalisation of Italian Companies (Agenzia per la promozione all'estero e l'internazionalizzazione delle imprese italiane), or the so-called ICE Agency (Agenzie ICE) ([Agenzie ICE, n.d.](#)).

Public institutions and agencies

The Agency of the Promotion Abroad and Internationalisation of Italian Companies (ICE Agency)

The ICE Agency does not have a specific mandate for the film sector, yet it strives to arrange initiatives and foster connections that can facilitate a wider circulation of Italian films overseas, given that film production and distribution also hold entrepreneurial and economic significance.

The ICE Agency, in cooperation with the main associations of the sector, has been carrying out intense activity in support of the Italian audiovisual sector for over 20 years (Int. It4). The main lines of action pursue the objectives of encouraging the sale and purchase of rights, developing



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international co-production opportunities, supporting the distribution of Italian audiovisual products on foreign markets and promoting Italian film locations and local technical industries (Int. It4).

The ICE Agency's promotion activity for the sector is carried out in close cooperation with the main public bodies and associations, including but not limited to the National Association of Cinematographic, Audiovisual and Digital Industries (Associazione nazionale industrie cinematografiche audiovisive e digitale - ANICA), Association of Audiovisual Producers (Associazione Produttori Audiovisivi - APA), Doc/it, Cartoon Italia, IIDEA, and Archivio Luce-Cinecittà.

Italian Film Commissions

The [Italian Film Commissions](#) (IFC) is an umbrella organisation bringing together nineteen regional film commissions across Italy. Each regional film commission and the IFC constitute a reference point for national and international cinematographic productions and cinema professionals, including authors, producers, and film and audiovisual institutions ([Italian Film Commissions, n.d.a](#)).

The IFC supports the development of the EFI not only in Italy but also beyond the national borders, also by actively establishing collaborations with national and international institutions to promote the IFI and to assist European co-productions ([Italian Film Commissions, n.d.a](#)).

The Regulation of the IFC Association defines the scope of IFC's competences, within its article 1, by clarifying that the IFC provides free-of-charge services for the following activities: **(1)** assistance with preliminary film location search, **(2)** facilitation of obtaining the necessary permits to shoot a film, **(3)** facilitation of relations and communications with public authorities, **(4)** providing logistical information with respect to an area considered for film shooting, **(5)** providing networking opportunities among cinema professionals, and **(6)** facilitating service agreements to streamline production processes ([Italian Film Commissions, n.d.b](#)).

In addition to these activities that lay the groundwork for cinematographic productions, article 4 of the aforementioned Regulation requires the IFC Members to attend the promotional events and organisations that are mentioned in the IFC meetings. Members are required to prepare and submit documentation and other materials that would help these promotional activities ([Italian Film Commissions, n.d.b](#)).



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As of March 2025, the Members of the IFC comprise the following regional film associations:

- Abruzzo Film Commission,
- Apulia Film Commission,
- Emilia-Romagna Film Commission,
- Campania Region Film Commission,
- Turin Piedmont Film Commission,
- Vallée d'Aoste Film Commission,
- Calabria Film Commission Foundation,
- Sardinia Film Commission Foundation,
- Friuli Venezia Giulia Film Commission,
- Genoa Liguria Film Commission,
- IDM Film Commission South Tyrol,
- Lombardy Film Commission,
- Lucana Film Commission,
- Marche Film Commission,
- Tuscany Film Commission,
- Trentino Film Commission,
- Sicily Film Commission,
- Umbria Film Commission, and
- Veneto Film Commission ([Italian Film Commissions, n.d.c](#)).

Cinecittà and Archivio Luce

Cinecittà is a public enterprise operated by the MiC in cooperation with the Ministry of Economy and Finance (Ministero dell'Economia e delle Finanze). Cinecittà assists the national distribution and theatrical release of Italian cinematographic works ([Cinecittà, n.d.](#)). It is also involved in the distribution of European co-productions and documentaries ([Archivio Luce, n.d.](#)). As to the international promotion of Italian cinema, Cinecittà supports several projects that help the visibility of classical and contemporary Italian cinema ([Cinecittà, n.d.](#)).

Cinecittà houses Archivio Luce, one of the most important European film and photographic archives. Archivio Luce contains analogue and digital content, including that retrieved from private collections ([Cinecittà, n.d.](#)). Given the abundance of materials deposited therein and its capacity to



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document the 20th century, UNESCO has inscribed Archivio Luce in the 'Memory of the World' registry ([Cinecittà News, 2013](#)).

Italian Pavilion

[Italian Pavilion](#) is a State-supported initiative which provides a venue to bring together cinema professionals and disseminates information on the financial opportunities domestic and non-domestic/foreign cinema professionals can benefit from to shoot individual productions or co-productions ([Italian Pavilion, n.d.a](#)). This initiative operates under the auspices of the MiC, MiAECI, the Italian Trade Agency and Cinecittà ([Italian Pavilion, n.d.a](#)).

The Italian Pavilion holds various events and meetings to bring together the market actors that play a key role in the main international markets and international film festivals. Furthermore, the official website of the Italian Pavilion hosts a database of past and upcoming international film festivals and events, including the ones hosted in Italy and across the globe, hence raising awareness and keep record of the past and ongoing efforts the IFI's internationalisation (see: [Italian Pavilion, n.d.b](#)).

The Cinema for Rome Foundation

Established in 2007, the Cinema for Rome Foundation (Fondazione Cinema per Roma - FCR) is dedicated to the promotion of cinema at local, national and international levels. Being in close contact with the industry leaders in Rome and the Lazio Regio in general, the FCR performs several tasks to promote Italian productions, including the implementation of the UNESCO Rome Creative City of Film and the organisation of the Rome Film Fest ([Fondazione Cinema per Roma, n.d.a](#)).

Following the designation of Rome by the UNESCO as 'Creative City of Film' in December 2015, the FCR pursues an action plan consisting of six projects to be completed over a four-year period. In this context, the FCR undertakes certain activities with international aspects, such as the launch of platform of audiovisual archives, the establishment of an international school for the conservation and restoration of films, founding cine-creative communities, and holding UNESCO networking events and activities ([UNESCO, n.d.](#)).

The Rome Film Fest, on the other hand, is yet another initiative pivotal for the internationalisation of the IFI. Organised as an annual international event taking place in October each year, the Rome Film Fest holds a busy agenda with film screenings, networking events, tributes and exhibitions as



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well as conferences and workshops. Since its debut in 2006, the Rome Film Fest attracts the attention of cinema professionals and enthusiasts across the globe ([Fondazione Cinema per Roma, n.d.b](#)).

It shall be noted that the Rome Film Fest is not the only landmark event of the FCR. Thanks to the financial support of the MiC, Lazio Region, Chamber of Commerce of Rome, Cinecittà and the Music for Rome Foundation (Fondazione Musica per Rome), the FCR organises a series of events over the year ([Fondazione Cinema per Roma, n.d.a](#)).

Other Public Institutions

This subsection maps the public institutions that contribute to the internationalisation of the IFI in various, yet often, indirect ways.

The Experimental Centre of Cinematography

The Experimental Centre of Cinematography (Centro Sperimentale di Cinematografia) was founded as a scientific and cultural reference point in 1935. It has its headquarters in Rome, and it hosts two disparate yet complementary institutions: The National Cinema School (Scuola Nazionale di Cinema) and the National Cinema Library (Cineteca Nazionale) ([Fondazione CSC, n.d.b](#)).

National Cinema School

The National Cinema School (Scuola Nazionale di Cinema), founded in the 1930s in Rome, is the first cinema school of Europe. Historically, it has been an educational centre where students could enroll in courses to learn acting, optics, phonics, set design and production in addition to theoretical courses, such as aesthetics, history of cinema, sociology of cinema, and art history. Embracing an international approach to its activities, the Scuola in the 1960s and onwards has become an institution aiming to educate and graduate 'global filmmakers'. Since then, it offers a three-year curricular programme dedicated to cinematography, and it holds several events throughout the academic year to provide for colloquiums to facilitate intercultural and international exchanges among cinema educators and students ([Fondazione CSC, n.d.a](#)).

National Film Library

The National Film Library (Cineteca Nazionale) is the national film library of Italy, which also constitutes one of the major cinematographic archives in Europe. It was established in 1949 by



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Law n. 958 of 29 December 1949 as a cultural heritage institution. Since then, Cineteca Nazionale's main activities revolve around restoration, cataloguing and preservation of Italian cinematographic content in accordance with its 'custodial and memory institution' status. At the time being, Cineteca Nazionale's repository holds a catalogue of a vast array of Italian cinematographic content, consisting approximately 60,000 titles ([Fondazione CSC, n.d.b](#)).

Cineteca Nazionale, also in line with the EU policies concerning the digitisation and online accessibility of culture and cultural heritage, engages also in digital restoration and preservation activities. It restores Italian masterpieces and other works that are known to a lesser extent, not only for conservation purposes but also to make them available to the public by different means, including film screenings and public loans ([Fondazione CSC, n.d.b](#)).

It shall be noted that the archives of Cineteca Nazionale consist of other cinematographic content, such as photo archives, film posters, and fliers. Last but not least, the official website of the institution makes its film catalogue, which enlists the titles that were digitised from 2002 until 2016, available to the public ([Fondazione CSC, n.d.b](#)).

Cineteca di Bologna

[Cineteca di Bologna](#) is a renowned cultural institution dedicated to the preservation, restoration, and promotion of film heritage. Originally part of the Municipality of Bologna's cultural sector, it became an autonomous institution in 1995 and is governed by a Board of Directors, a President, and a director ([Cineteca di Bologna, n.d.a](#)).

The Cineteca plays a crucial role in safeguarding and restoring films to ensure their accessibility for contemporary and future audiences while also supporting film culture through educational initiatives, public screenings, and programmes for emerging filmmakers. It manages the Bologna Film Commission, which promotes film production and dissemination. With an extensive film archive of over 60,000 films available for research and consultation, the Cineteca also operates L'Immagine Ritrovata, a publicly owned laboratory specialising in film restoration ([Cineteca di Bologna, n.d.b](#)).

The Renzo Renzi Library serves as a key resource for film and photography studies, housing collections such as the Pier Paolo Pasolini Archive, the Chaplin Project, and the Marcello Mastroianni Study Centre. The institution is also a dynamic centre for cultural activities, offering film education programmes, public engagement initiatives, and a diverse range of screenings at



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Cinema Lumière. It organises major film festivals, including Il Cinema Ritrovato, Visioni Italiane, and Human Rights Nights, as well as the open-air summer film series Sotto le Stelle del Cinema in Piazza Maggiore. Additionally, the Cineteca actively participates in international film festivals and produces scholarly publications, reinforcing its global significance in film preservation and research ([Cineteca di Bologna, n.d.c](#)).

Private Institutions

In addition to the State and sub-State institutions enlisted above, there are several other key actors, established as private entities, that undertake a significant role in the international promotion of the IFI. Therefore, this subsection provides an overview of these key private actors; nevertheless, it must be noted that the list provided herein is far from an exhaustive one.

The National Association of Cinematographic, Audiovisual and Digital Industries (ANICA)

ANICA is a 'confindustria', or in other words, a private and autonomous chamber of commerce established as a federation of Italian SMEs and big enterprises, with the official mandate to represent several categories of Italian companies operating in the film, audiovisual and digital industries. Since its foundation in 1944, ANICA has contributed to the progress of the IFI, primarily, by establishing relationships among the key market actors, including both public and private actors ([ANICA, n.d.](#)).

ANICA, aside from its mandate to negotiate and conclude collective labour agreements governing the rights of multiple categories of cinema professionals (e.g. actors and actresses, other performers, stuntmen), undertakes important tasks for the internationalisation of the IFI. First and foremost, as the Italian representative of the Academy of Motion Picture Arts and Sciences, ANICA selects the Italian film candidate for the Academy Award for Best International Feature Film ([ANICA, n.d.](#)).

Additionally, in 2017, ANICA, in collaboration with the Association of Audiovisual Producers (Associazione Produttori Audiovisivi - APA), established the International Audiovisual Market (Mercato Internazionale Audiovisivo - MIA), which was envisaged and devised as an international hub to host business-to-business events at international scale. Funded by the MiACMI, the Lazio Region and the EU's Creative Europe - MEDIA programme, the MIA not only provides physical and digital spaces to establish professional networks but also several specialised programmes,



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such as Co-production Market & Pitching Forums, market screenings, professional workshops and conferences addressing the current trends in and challenges of the industry ([MIA, n.d.](#)).

It shall also be noted that since 2021, ANICA has been representing several 'Digital Native Operators' including International Exporters, Digital Publishers and Creators, Audiovisual Media Publishers ([ANICA, n.d.](#)).

The Association of Audiovisual Producers

The [Association of Audiovisual Producers](#) (APA) is an association of producers of dramas/series, films produced for television and VoD platforms, documentaries and animations. It not only supports the growth of these sectors but also aspires to enhance the international promotion of such Italian content ([APA, n.d.](#)). To do so, the APA attends and represents its members in non-domestic/foreign events across Europe and beyond, while also hosting the MIA, in collaboration with ANICA ([APA, n.d.](#)). In this regard, the APA organised or attended several events, including but not limited to the Series Mania Forum of 2025 and 2024, MIPCOM of 2024 and 2023, Sunny Side of the Doc in 2024 and 2023, MIPTV 2024, along with the 'Meet the Italian Audiovisual Producers' event which took place in Los Angeles in 2023 ([APA, n.d.](#)). Besides, the APA participates in the European audiovisual public policy-making through its membership to the European Audiovisual Production Association (CEPI), while also pursuing its own research agenda and producing reports and articles on the status of the IFI ([APA, n.d.](#)).

Additionally, it offers several services to its members, which are, directly or indirectly, helpful to the internationalisation of the IFI. These services are: **(1)** providing consultancy on international events and activities, including cinematographic co-productions, **(2)** providing networking activities with other key stakeholders in the field, **(3)** conducting research activities concerning the needs of the audiovisual sector, **(4)** assistance with the international registration of cinematographic works ([APA, n.d.](#)).

The Italian Executive Producers Association (APE)

The Association of Executive Producers and Production Service Companies (*Associazione Produttori Esecutivi* - APE) is the leading entity in Italy to ensure the quality of international projects. Only in the last twenty years, the APE Members have contributed to internationally-acclaimed cinematographic productions. The APE pursues its mission by disseminating information on the tax incentives and funding opportunities provided by the Italian



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State as well as promoting the 'Italy for Movies' platform, hence actively participating in the collective efforts to attract the attention of non-domestic/foreign producers ([APE, n.d.](#)).

2.3.3 State-Funded Programmes

The Italian State's endeavours to revitalise the IFI and its international promotion can be clustered in three categories: **(1)** the national financial support schemes and tax credit system introduced by the Cinema Law/Legge Cinema Law n. 220 of 14 November 2016, which extend to the productions of non-domestic/foreign film producers; **(2)** the brand-new 'Italy Offers Everything You Need' initiative launched in 2024, and **(3)** the co-development and co-production agreements and funds, which are launched pursuant to the 2005 UNESCO CDCE and the 1992 CoE Convention on Cinematographic Co-production (as revised in 2017).¹⁵ There are also a limited number of other agreements and arrangements that are expected to contribute to the internationalisation of the IFI.

National Financial Support Schemes and Tax Credit

The Cinema Law/Legge Cinema ([Law n. 220 of 14 November 2016](#)) (and the amendments that followed) introduced financial support schemes to help the IFI revitalise. The funds for investment in the development of the cinema and audiovisual sector ([Fondo per lo sviluppo degli investimenti nel cinema e nell'audiovisivo](#)) was established with a minimum amount of €400,000,000 per year in 2016, reaching an amount of €750,000,000 in 2022. These funds are allocated as follows: **(1)** 3% of the overall fund is dedicated to the empowerment of educational programmes, **(2)** certain funds are invested in key institutions such as Istituto Luce-Cinecittà, Museo Italiano, Biennale di Venezia, Centro sperimentale di cinematografia, Museo nazionale del cinema di Torino, Cineteca di Bologna, Fondazione Cineteca Italiana di Milano, and Cineteca del Friuli di Gemona del Friuli; **(3)** a portion of the funds are dedicated to the extraordinary plans to improve cinema theatres' infrastructure (e.g. €20,000,000 during 2020, €10,000,000 during 2021); **(4)** yet another portion of funds are dedicated to the extraordinary plans for digitalisation of dramas/series and heritage of Italian cinema (e.g. €10,000,000 for years 2017-2019); and finally, **(5)** there are funds for small- and medium-sized enterprises (SMEs) (e.g. €5,000,000 in 2017).

Additionally, the same Law introduced a tax credit system, which refers to a financial tool widely used to promote the development, production, distribution, and other parts of the production chain

¹⁵ For more information on the interplay with the UNESCO and CoE Conventions on the internationalisation of the EFI in general, please refer to other deliverables of the REBOOT Project, specifically D3.5 – Final Report on the Mapping and EU Law of Institutional Models for the Promotion of EFI.



of film, audiovisual, and web products. This scheme was a novel contribution to the IFI as it introduced several flexibilities to the existing tax credit schemes.

Whereas the tax credit schemes for the cinema are generally based on the cost reported in the balance sheet, the aforementioned Law introduces exceptions to this rule by reflecting on the production chain and general circumstances (e.g., the pandemic outbreak). It is noteworthy that the tax credit rate was 30% in the pre-COVID era, and this percentage mirrored the floor rate. However, the post-COVID era witnessed significant changes in the calculation of tax credits. For instance, a 40% tax credit rate, which is to be calculated over the expenditures rather than the balance sheet, is envisioned for the production of Italian films and international co-productions, educational films and audiovisual content, and for non-Italian content (e.g. films, TV broadcasts, online content) produced, at least partially, in Italy. Likewise, the tax credit for producing Italian cinematographic content, including international co-productions, for TV broadcasts and online platforms ranges between 30% and 40% of the expenses. Also, in the case of international co-productions, the tax credit is reduced to 20% of the total investment in the production only if the work has received selective contributions and if the international co-producers cover at least 20% of the total production budget ([Cucco, 2021](#)).

Complementary to the film production phase, the Law provides tax credit schemes for national and international distribution. The tax credit for the national distribution of Italian films, including international co-productions, in cinema theatres ranges from 15% to 30% of expenses. These rates increase to 40% if the independent producer also is the distributor. Additionally, rates are increased for the distribution of works in cinemas during periods of health emergencies related to the COVID-19 pandemic. The tax credit for internationally distributing Italian cinematographic content, including online works and international co-productions, is set as 30% of expenses.

Another financial instrument introduced by the same Law is the automatic contributions (incentive automatico) and selective contributions (contributo selettivi). The automatic contributions system refers to the economic incentives allocated for the development, production and distribution of new cinematographic content. This system applies to content produced both in the form of films and works for television and digital space. It helps cover the investment required for the development, production and national and international distribution, as well as online distribution and exploitation (e.g. online streaming, VoD platforms) of films. The 'automatic' feature of this system stems from



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the automatic assignment of the result values through a scoring system which takes into account several parameters, including the co-production of a work with non-domestic/foreign producers.

The selective contributions, on the other hand, provide financial aid, mainly, to the audiovisual content with high artistic quality and cultural value. These contributions are dedicated to aid the writing, developing, producing, and the national and international distribution as well as promotion of such content. According to the records of the MiC and DGCA, selective contributions are mainly allocated to certain categories of works, such as the works of new-generation authors, debuts and second works, artistic films, short films, animations and documentaries. Since 2024, films and series that are aimed at promoting national culture and identity have been included among the scope of works to which the selective contribution scheme applies ([Ministero della Cultura, 2025](#)). As opposed to the automatic contributions, these types of contributions are assigned through the qualitative assessment of a cohort of experts, yet the parameters taken into account also include the international co-production status of the content under assessment. Furthermore, the selective contributions comprise non-refundable economic incentives allocated through official public calls.

‘Italy Offers Everything You Need’ Initiative

The MiC and the DGCA have launched the ‘Italy Offers Everything You Need’ initiative in 2024 to offer an overview of the film production scene in Italy ([Cinecittà, 2025](#)). This initiative disseminates information on the financial incentives and tax credits available for individual production and co-productions, the current co-production agreements of which Italy is a party, and the bilateral co-development or co-production funds Italy has with Portugal, Tunisia, the Baltic States and France ([Ministero della Cultura, 2025](#)).

Such information is key to promote co-productions and help foster the internationalisation of Italian cinematographic content. Therefore, this information was consolidated into a guide and published in both Italian and English, the latter of which was addressed to non-domestic/foreign film producers. These guidelines were updated in February 2024 for the 2025 EFM organised in the context of the 75th Berlin International Film Festival. The updated guidelines were made available to the public through the official website of the MiC ([Ministero della Cultura, 2025](#)).



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2.4 Greece

2.4.1 Objectives

Greece's strategy for promoting its cinema internationally is based on a multi-dimensional approach built around three pillars: economic development, cultural diplomacy and the promotion of Greece's identity. As part of this aim to structure a coherent policy to make cinema a lever for cultural and economic development, the main national institutions were merged to create the Hellenic Film and Audiovisual Centre - Creative Greece SA (H.F.A.C. – Creative Greece). The objective is to attract foreign investment through a range of incentives. Within this framework, Greece aims to assert its place as a competitive filming destination, strengthen international co-production, and support the development of the skills of professionals in the sector in the face of the various challenges they are currently facing.

At the same time, Greece is mobilising its cultural diplomacy to enhance its visibility on the international stage, supporting the dissemination of its works through festivals and bilateral agreements. The development of various tools aimed at boosting the sector's reputation and training young people and professionals demonstrates a desire to establish a long-term policy based on sustainability, innovation, and broader access to culture. The choice of Athens as the host city for the European Film Awards in 2027 reflects this ambition to position the country as a central player in the European film landscape and to strengthen the exportability of Greek productions.

2.4.2. Actors

The state of play of national institutional actors involved directly or indirectly to the international film promotion in Greece is diverted into three main Ministries of the Greek government, with the Ministry of Culture engaging the most active role.



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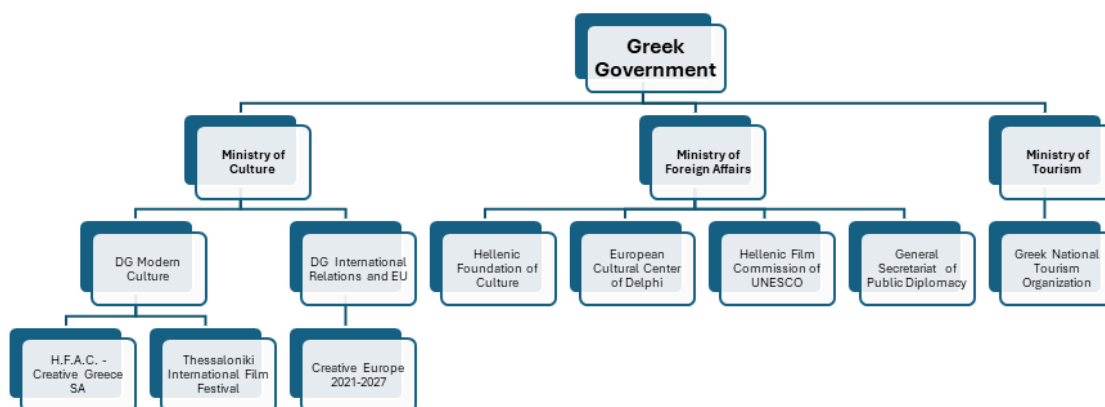


Figure 23 - Greek Film Industry: International Promotion Actors Map

State Actors

Hellenic Ministry of Culture

A key institutional actor in film and audiovisual policies and national strategies in Greece is the Hellenic Ministry of Culture. The Ministry aims to promote Greek film and audiovisual culture worldwide as well as to support the development of modern artistic creation. Through the two General Directorates, of Modern Culture and of International Relations and EU, the Ministry encourages international cooperation to foster a competitive film market within the Creative and Cultural Industries (CCI's) and to manage and safeguard film and audiovisual creation, as well as cultural heritage. More specifically, the Department of Cinematography and Audiovisual Media (within the General Directorate of Modern Culture) is responsible for the **(a)** development and promotion of film production by providing subsidies to supervised organisations, **(b)** strengthening film creativity through EU programmes and funds, **(c)** implementation of audiovisual and film legislation in Greece and the EU, **(d)** evaluation of the suitability of film content, **(e)** promotion of the Municipal Cinema Network, **(f)** preservation, maintenance and creative use of Greek film heritage, **(g)** encouraging citizens' access to film art and media creation, **(h)** representing Greece at international film festivals and awards and supporting emerging film and media creators and **(i)** the development and promotion of CCI's in general ([Hellenic Republic Ministry of Culture, n.d.](#)).

In the same context, the Ministry is the Greek national delegate in the EU funding scheme of Creative Europe 2021-2027, stands of Culture, MEDIA and cross-sectoral projects, through the



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Department of EU (DG of International Relations and EU) ([Hellenic Republic Ministry of Culture, n.d.](#)).

H.F.A.C. – Creative Greece is the new film and audiovisual main agency as société anonyme supervised by the Ministry of Culture, Law 5105/2024, as the focal point for promoting the country's Cultural and Creative Industries and for further developing competitive film, audiovisual and media creation. The aim of Creative Greece SA, subsidised by the state, is to coordinate and set up a national development policy agenda in the CCI's and ultimately, on audiovisual, film and media production, entrepreneurship and education, to support and scale up a competitive creative film industry as key financial development indicator in the country and abroad ([H.F.A.C., n.d.a](#)).

TIFF- Thessaloniki Cinema Museum, is also supervised by the Ministry of Culture, as a legal entity governed by private law, established under Law 3905/2010, being the oldest and leading art house film festival in the country. The festival aims to promote film culture and education, to support the domestic and international film industry, to form partnerships with national and international cultural institutions and to promote Greece's cultural identity on the global stage ([H.F.A.C., n.d.c](#)).

Hellenic Ministry of Foreign Affairs

The Hellenic Ministry of Foreign Affairs is the key actor in Greece engaging in cultural diplomacy. Cultural diplomacy represents a form of soft power that constitutes a central pillar of national diplomacy, both an expression of effective foreign policy and a tool for fostering people-to-people relations. The concept of cultural diplomacy has a strong developmental dimension within the CCI's within a country's development strategy. On this basis, the Ministry works collaboratively with national and international stakeholders on promoting cultural diplomacy, namely through the support of cultural events worldwide, including Greek Film Festivals, art exhibitions, theatrical productions, etc. To this end, the Ministry also develops bilateral educational and cultural agreements on building a climate of trust and cultural promotion of the country (e.g., Museums, Cultural Foundations, State Archives, National Libraries) ([Hellenic Republic Ministry of Foreign Affairs, n.d.](#)).

Within the framework of public diplomacy, culture - especially through its capacity to multiply interactions - stands as a key domain for promoting Greece and its outward-looking orientation in the international environment and Greek Diaspora. A significant axis of activity is that of supporting the promotion of audiovisual and film production in Greece and abroad, namely through



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partnership with Creative Greece SA, ERT SA, etc. Main agents of cultural diplomacy are the Hellenic Foundation for Culture (HFC), the HFC in Venice, the European Cultural Centre of Delphi and the Hellenic Film Commission of UNESCO ([Ministry of Foreign Affairs, n.d.](#)).

Hellenic Ministry of Tourism

The Hellenic Ministry of Tourism is also involved in the promotion of film policies as part of its cultural tourism agenda, mainly through its agency, the Greek National Tourism Organisation (GNTO). In this context, the Ministry executes national strategies on tourist development that include supporting Greece's film development as a cultural product and as a leading tourism and filming destination, facilitating film location shootings, through multilateral agreements with relevant stakeholders in Greece and abroad ([Hellenic Republic Ministry of Tourism](#)).

National Film Agencies

Hellenic Film and Audiovisual Centre - Creative Greece SA (H.F.A.C. – Creative Greece).

H.F.A.C. – Creative Greece is the new national agency, resulting from the merger of the Greek Film Centre (GFC) and the National Centre of Audiovisual Media and Communication (EKOME) by L. 5105/2024. This was a coordinated effort of the Greek public administration initiated in 2022 to set up a coherent national cultural policy in the creative sector and most specifically, particularly in audiovisual, film, and media production, entrepreneurship, and education, aiming to support and scale up the creative film industry as key financial development indicator in the country and abroad ([H.F.A.C., n.d.a](#)).

The mission of H.F.A.C. – Creative Greece is: **(a)** to develop, strengthen and protect Greek audiovisual media and cinematography, contributing to international promotion of Greek productions **(b)** to support domestic and attract foreign investments in the film and audiovisual sector, as well as in the broad cultural and creative sector, **(c)** to support the integration of new technologies and innovations in the audiovisual industry and use of modern digital media infrastructure for the promotion of the country's cultural and creative sector, as well as dissemination and visibility of research in the respective fields, **(d)** to organise and operate two new structures, the National Digital Repository of Audiovisual Works and the Hub for Innovation, Education and Technology for the Creative and Audiovisual Sector (Creative Hub GR), as part of special programmes supporting, networking and extroversion of the CCI's **(e)** to contribute to the fight against piracy, whether online, technological, or in other forms, and protect intellectual



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property in the film, audiovisual and creative sectors in cooperation with co-competent bodies, **(f)** to design and implement media and film education, training programmes and professional capacity development in formal education and lifelong learning, in accordance with the latest technological developments, **(g)** to support the Government in the design of policies for film, audiovisual and creative industries of the country and the CCI's promotion in Greece and abroad. Creative Greece SA is also active in the field of cultural diplomacy, combining audiovisual and film resources, preserving and promoting Greek audiovisual heritage as 'cornerstones' of national cultural diplomacy ([H.F.A.C., n.d.b](#)).

The agencies of H.F.A.C.- Creative Greece for international film promotion and professional development are ([H.F.A.C., n.d.a](#)):

- Cash Rebate 40% (FTV/ VGD / Animate) and Tax Relief 30%, for bolstering the framework of attracting and supporting investments in the audiovisual industry through three distinct aid schemes, Film & TV, Animation and Video Game Development as well as a separate Tax Relief 30% initiative.
- Hellenic Film Commission, in charge of promoting and developing Greece as a filming destination for international film productions and facilitating international productions.
- Film Production and Development, in charge of developing Greek film production with a focus in supporting new and emerging talent. Through its specialised funding schemes it provides support across all stages of filmmaking: script development, pre-production and production while also supporting training initiatives for new producers and filmmakers.
- Hellas Film, in charge of promotion and distribution of Greek cinema, domestically and internationally in film festivals, film markets and special events all around the world as well as of Greek Film Centre's print and digital archive.
- Creative Hub GR, the Hub for Innovation, Education and Technology tasked with networking and building community development between new creators and newly established undertakings in the cultural sector on the one hand and the market on the other, to increase prospects of attracting European programmes.
- Cultural and Creative Observatory, within Creative Hub GR, tasked with monitoring data and recording statistics to facilitate the planning of audiovisual, film and creative policies in Greece. The Observatory collects, evaluates, analyses and publishes statistics and other data of the creative sector and prepares reports, strategy studies and documentation.



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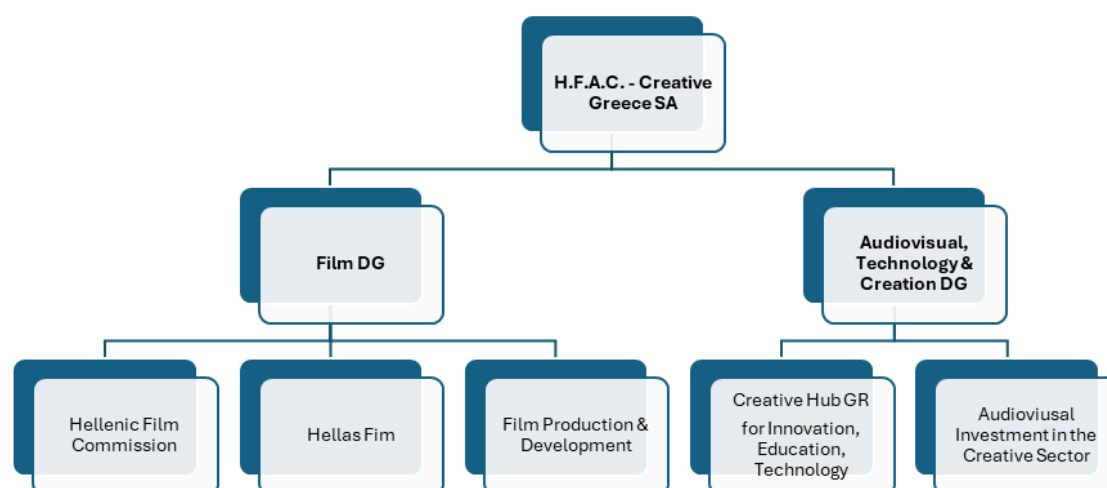


Figure 24 - Hellenic Film and Audiovisual Centre: Creative Greece SA structure on film promotion

Apart from H.F.A.C.-Creative Greece SA, other national institutional bodies engaging with promoting creative film industry, directly or indirectly, in Greece are:

Hellenic Broadcasting Corporation (ERT) S.A.

A public enterprise, supervised by the Presidency of the Government, Secretariat General for Communication and Information with a remit that includes fostering TV and film production. This mandate is primarily implemented through the allocation of 1.5% of its annual turnover each year to the production of film works, such as the Microfilm funding scheme, and the creation, promotion and distribution of domestic film productions (and co-productions) to international film markets. It is considered of “utmost importance that the Greek Public Service Broadcaster maintains an active role in film production and promotion both in Greece and in the international market as co-producer” (Int. Gr4.).

Film Permits and Regional Film Offices

With regard to filming permits, there is no central, nationwide body responsible for granting authorisation. Parties interested in filming international productions must contact the archaeological, military, municipal and other competent authorities, often involving lengthy and bureaucratic procedures. No permit is required to film in open-air spaces, except in the case of special permits provided by law. The application process for film permits is often complex and fees levied vary in different locations. For instance, filming on private property requires written permission from the property owners ([Hellenic Film Commission, n.d.](#)).





Figure 25 - Regional Film Offices in Greece

To streamline these procedures, the Regional Film Offices operate as a National Network of Audiovisual Production Facilitation Offices, under the Municipalities and Regions all over Greece, funded by Greece's Public Investment Programme. Regional Film Offices were established and operated by EKOME in the 13 Regions and the two major Municipalities of the country (Athens and Thessaloniki), to support the services (location shooting, administrative tasks) for audiovisual and film production throughout Greece. They act as facilitators for further promotion and strengthening of Greece's cultural identity internationally as a reliable and competitive filming destination, for the attraction of foreign direct investment in the form of private producers, the boosting of domestic entrepreneurship and the creation of new jobs ([Hellenic Film Commission, n.d.](#)).

Greek Cultural, Film Associations, NGOs that promote Greek filmography abroad (in alphabetical order)

- Association of Greek Film Directors – Producers (ESPEK): Its main purpose is the protection and promotion of Greek cinema in Greece and abroad. It counts 116 members from Greece mainly, film directors and young talents ([Hellenic Film Commission, n.d.](#)).
- Audiovisual Producers' Association of Greece (SAPOE) ([n.d.](#)): Non-profit organisation since 1975, representing Greek companies active in the production of films, television programmes and new media. SAPOE as member of EAVE develops synergies for co-productions and provides training and production services to foreign productions filming in Greece.
- Director's Cut ([n.d.](#)): Non-profit organisation promoting and contributing to every field and aspect related to directors engaged in the production of commercial spots with special



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focus to preferred advertising practices and intellectual property rights from treatment to first cut.

- Greek Film Archive & Film Museum ([n.d.](#)): Preserving, educating and promoting Greek film heritage in Greece and abroad.
- Greek Directors' Guild ([n.d.](#)): Founded in 1973 it is the artistic and professional association of Film, Theatre and Television directors, with 1200 members in its ranks. Member of the Federation of European Screen Directors (FERA) and the International Federation of Audiovisual Workers. Through its 'Filming in Greece' Office, it promotes film services for attracting foreign producers in order to develop their projects in Greece.
- Greek Documentary Association (Hellas Doc) ([n.d.](#)): Greek professional documentary filmmakers' guild (producers, directors, cinematographers, sound engineers, editors etc.) for developing Creative Documentary, as a distinct form of filmmaking in Greece for its further recognition and promotion internationally.
- Greek Federation of Film Societies (OKLE) ([n.d.](#)): NGO active for more than 70 years, aiming to promote cinema and film education, through screenings of selected Greek films, conventions and seminars on theory, history, and the technique of the cinema.
- Greek Film Critics Association (PEKK) ([n.d.](#)): Founded in 1976 with an active role in the formation of the Greek film institutional framework and TIFF through participating in the advisory committee of the Ministry of Culture, where they submitted the proposal for film international promotion in 1991. Almost every year, PEKK offers film awards during TIFF as important distinctions for Greek film. Member of International Federation of Film Critics since 1977.
- Greek Producers Association (Movie, TV, Video & Multimedia) ([n.d.](#)): Of the oldest unions in the film and mass media industry, with the aim to pursue the protection and promotion of ethical, financial and professional interests of its members through professional training and conferences. The Union works towards ensuring favourable terms for production and distribution of Greek Films as well as the development of Greek Film trade, domestic and abroad.
- Greek Society of Cinematographers ([n.d.](#)): Aims in highlighting, promoting, educating and disseminating the art of film narrative within its members from acclaimed Greek Cinematographers (Directors of Photography).
- Greek Union of Film Television and Audiovisual Technicians (E.T.E.K.T. – O.T.) ([n.d.](#)): First degree trade corporation, founded in 1948 with members from all specialties of film and



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audiovisual, such as Direction, Production, Cinematography, Set– Costumes designing, Sound recording, Editing, Make-up, Electricians, Special Effects, Laboratories, Television, Broadcasting, Recording, New Technologies. It aims to secure professional and legal rights of its members, full technical education, promotion and recognition of Greek cinematography both in Greece and abroad.

- Hellenic Animation Association (ASIFA Hellas) ([n.d.](#)): Not-for-profit civil society, aiming to promote Greek animation in Greece and abroad. Comprising the Greek national chapter of Association International d' Film d' Animation, ASIFA Hellas collaborates closely with the Hellenic Government (Ministry of Culture & Sports, Creative Greece SA, ERT, Ministry of Education & Religious Affairs) on actions on co-production, professional development and global markets.
- Hellenic Film Academy (HFA) ([n.d.](#)). Founded in 2009, apart from the Annual European Film Awards, HFA leads and supports initiatives regarding the development of domestic film production and outsources research projects aiming to improve national film policy. Member of Film Academy Network of Europe. In January 2025, HFA announced that the 39th Annual European Film Awards for 2027 will take place in Athens, Greece coordinated by the H.F.A.C. – Creative Greece, acting as the coordinator of the Greek consortium comprising the Ministry of Culture, Ministry of Tourism, Ministry of Economy and Finance, City of Athens, Region of Attica, Stavros Niarchos Foundation Cultural Centre, and the ERT.
- Isocratis ([n.d.](#)). Royalties Collecting Society for managing copyrights of film artists. Represents, since 1994, Directors of Photography, Production Designers, Editors, Sound Engineers, Costume Designers in Greece as well as filmmakers active abroad.
- Media Producers Association (PACT) ([n.d.](#)). Founded in 1973, represents Greek production companies which employ more than 5,000 people annually, offering production services to international productions in Greece, co-producing feature films, investing in interactive technologies both in shooting as well as in image and sound processing and supporting new directors and technical personnel in the wider audiovisual field.
- Scriptwriters Guild of Greece ([n.d.](#)). Founded in 1989, is the only professional scriptwriters union in Greece with the aim to protect scriptwriters' rights as film creators and professionals in the audiovisual industry, by forcing the implementation of the relevant constitutional laws. Constitutional member of the Federation of Scriptwriters in Europe (FSE), with over 130 members from film and television industries.



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Mapping these cultural, archive and film associations active in Greece showcases the great mobility and increased undertaking on promoting film both as a cultural, public diplomacy good as well as a financially competitive product for boosting Greek cinematography abroad.

2.4.2 State-Funded Programmes

The majority of state funding schemes and investment programmes on film, audiovisual and digital media are managed by the H.F.A.C. - Creative Greece. The main investment tool for film and audiovisual production is Cash Rebate 40% (CRGR-FTV, CRGR-Animate, CRGR-VDG) as a guarantee to a Greek bank against a loan. It started from 25% in 2017 and increased to 40% (Joint Ministerial Decision 7651/2021), the implementation of the Greek cash rebate programme was a decisive step towards attracting investment through the production of films, television series, documentaries, animation, and digital games in Greece. The cash Rebate is followed by Tax Relief 30% as an additional tax exemption tool ([H.F.A.C., n.d.c](#)).

Further information and descriptions of Greece's programmes and selective schemes for films can be found in [Annex III](#).

Film Education / Training / Professional Development

A significant strand for promoting film nationally and internationally as a cultural product is through film education and audience development to build a strong cultural film identity as well as cater to 'screenwise citizens' ([Andriopoulou, 2018](#)), through art house films. In this sense, Greece is a key player in the EU in developing media and film literacy initiatives for children, young people and adults.

Thessaloniki Film Museum / TIFF runs the NextUs Platform, an educational programme within the framework of 'Creative Greece / MEDIA' in collaboration with the Munich Festival in Germany. The main goal is to teach 20th-century history in the classroom, by introducing young audiences to European documentaries by promoting the transnational circulation of European audiovisual works ([TIFF, 2025](#)).

The H.F.A.C. – Creative Greece SA supports training, professional development and film education through Creative Hub GR, the new Hub for Innovation, Education and Technology, across three distinct sectors of action: Innovation, the Digital Repository of Film and Digital Works and Audiovisual and Film Education, through the development of a Media and Creative Literacy policy agenda in schools and lifelong learning. CiNEDU, the Digital Movie Platform for Schools, is



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one of the most prominent and complete film education programmes nationwide, co-funded by the EU, for all levels of school education, offering a holistic approach to film literacy through screenings of EU children's films, workshops, and teachers' handbooks on how to teach in the classroom ([H.F.A.C., n.d.b](#)).

The Greek Film Archive Foundation occasionally runs film education projects, such as the EU project 'i Media Cities', an educational programme focused on historical films and images of cities from the collections of renowned European film archives ([Greek Film Archive & Film Museum, n.d.](#)).

2.5 Poland

2.5.1 Objectives

Poland's policy regarding the international promotion of its film sector is crafted to elevate Polish cinema's global standing while attracting foreign investment and creative talent. The primary objectives of this policy are multifaceted, encompassing the enhancement of Polish cinema's visibility on the international stage through participation in prestigious film festivals, such as Cannes and Berlinale. On the other hand, events like the Warsaw Film Festival and the New Horizons Film Festival serve as vital platforms for showcasing Polish films, connecting filmmakers with international audiences, and facilitating distribution deals (de Valck, 2013; Stringer, 2001). Furthermore, it involves the establishment of a financial incentive framework, which includes a 30% cash rebate system designed to alleviate production costs for foreign filmmakers.

Additionally, the Polish film industry actively engages in international co-productions, bolstered by initiatives such as Eurimages and Creative Europe, thereby fostering collaborative relationships that enrich both the financial viability and cultural depth of film projects. Co-productions allow Polish filmmakers to pool resources and create films that can appeal to a broader audience while benefiting from the distribution networks of partnering countries. Such collaborations facilitate access to international film markets and enhance the competitiveness of Polish films (Szeptycki, 2021). These comprehensive initiatives collectively fortify Poland's position within the global film landscape, cultivating an environment conducive to both domestic and international film enterprises. However, despite initiatives to promote Polish cinema internationally, challenges remain, particularly regarding consistent and unified efforts among stakeholders. The strategic positioning of Polish films must also consider the evolving dynamics of global cinema, where



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competition from established industries like Hollywood poses significant challenges (Bartosiewicz & Orankiewicz, 2020).

The 2005 Cinematography Act brought about significant changes to the film landscape in Poland ([The Cinematography Act, 2005](#)). This legislation established a clear organisational structure and a prominent entity dedicated to developing the Polish film market at both national and international levels.

In 2024, the Polish film industry achieved a valuation of €315,9000,000, situating the nation among the eight leading revenue-generating film markets within Europe ([IBISWorld, 2024](#)). During the same reporting year, 106 feature-length films and 256 medium-length and short films were produced for both cinema and television. The total box office revenue reached €170,000,000. As one respondent notes: “Polish cinema does not function. It is only beginning to function in the collector's circuit” (Int. Pol3).

This statement underscores the nascent state of Polish cinema, suggesting a potential shift towards niche markets. Stakeholders must recognise this opportunity for growth within collector circles while addressing the challenges of broader market engagement. By fostering connections and enhancing visibility, the Polish film industry can cultivate a more robust presence in the global landscape. On the other hand, another strategic path for the development of cinematography in Poland is through the latest technologies. In 2022, Poland served as the hub for Netflix's Central and Eastern Europe operations, attracting additional financial investments from various global streaming services ([Kostovska, 2024](#)).

Poland acceded to the EU in 2004, although its integration into European audiovisual frameworks predates this milestone. The country has been a member of Eurimages since 1992 and joined the MEDIA Programme in 2002. As a beneficiary of various European funding mechanisms, Poland has gained access to financial support structures that not only bolster its national audiovisual sector but also facilitate international cooperation. In particular, the MEDIA strand of the Creative Europe programme plays a pivotal role in supporting the development, distribution, and promotion of European audiovisual works, with a growing emphasis on addressing the challenges and opportunities presented by the contemporary digital environment.



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2.5.2 Actors

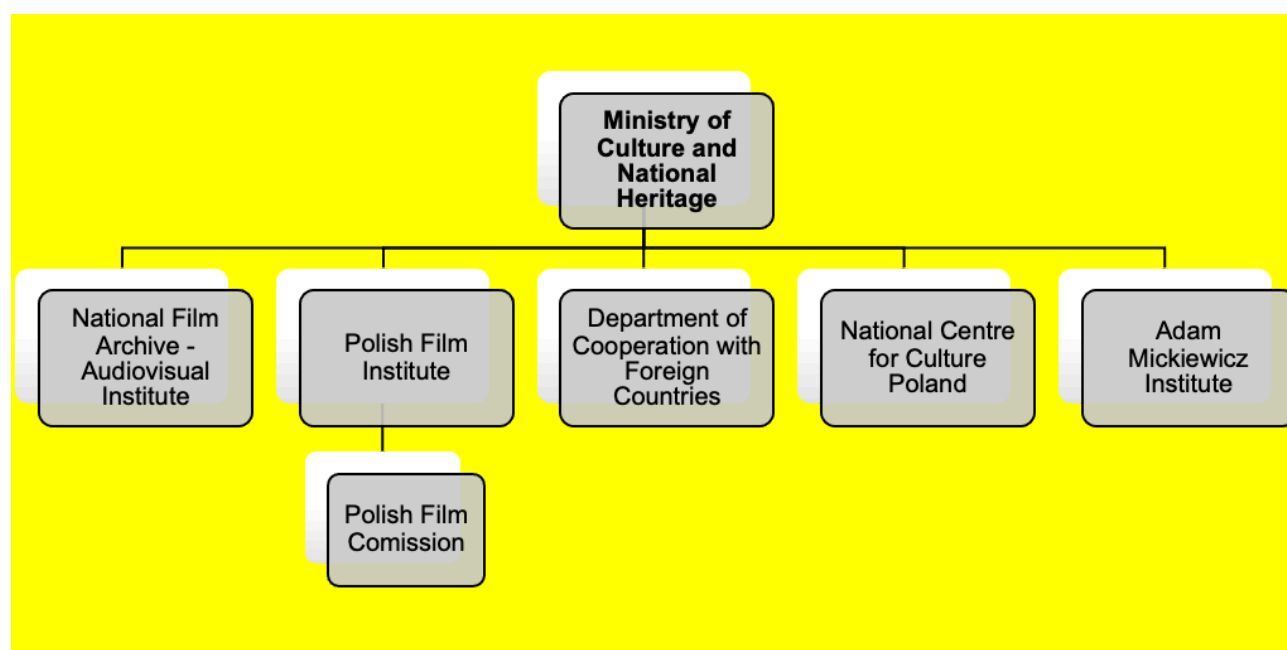


Figure 26 - Polish Film Industry: International Promotion Actors Map

State-level institutions

The Ministry of Culture and National Heritage

The Ministry of Culture and National Heritage (Ministerstwo Kultury i Dziedzictwa Narodowego – MKiDN) is the principal body supporting the development of the film industry in Poland. As part of its statutory responsibilities, the Ministry administers a range of programmes (32 programmes in 2024) that encompass, among other areas, artistic education, digital culture, and the protection of cultural heritage abroad ([MKiDN, 2024a](#)). Programmes that facilitate the development and promotion of Polish cinematography include the Film programme (managed by the National Film Archive - Audiovisual Institute) and the Promotion of Polish Culture Abroad programme (managed by the Department of Cooperation with Foreign Countries). The Ministry of Culture and National Heritage in Poland organises numerous events, festivals, and programmes to promote Polish cinema worldwide. It collaborates with international and national institutions to increase Polish cinema's presence in the global market.



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The Polish Film Institute

The Polish Film Institute (Polski Instytut Sztuki Filmowej - PISF) is Poland's leading institution for film development and promotion, operating under the Law on Cinematography since August 19, 2005. PISF aims to enhance its global stature by creating conditions similar to those enjoyed by internationally acclaimed cinematographers ([PISF, 2024a](#)). One respondent noted, "It is not merely a legal entity but an entity that sets strategic directions or goals" (Int. Pol3). Since its establishment in 2005, the Institute has followed a funding system common in European countries, primarily relying on public funding, although private and local government sources are increasingly significant (Wantoch-Rekowski & Czarnecki, 2023). The law's greatest achievement lies in establishing an efficient system that functions effectively today, benefiting both state and film communities (Int. Pol7).

The Institute is a public cultural entity that supports the Polish film industry on both national and international levels. It provides financial support and subsidies for Polish films, promotes international visibility, and organises industry festivals and promotional events. PISF also focuses on film education, digitisation of audiovisual works, and modernising cinemas with new technologies, facilitating universal digital access to European film heritage. Funded by public resources under the Ministry of Culture and National Heritage, PISF's activities revolve around six main pillars: 1) film production; 2) film education; 3) dissemination of film culture (including festivals, initiatives, magazines, digital reconstruction, and audiovisual market research); 4) cinema theatres; 5) international promotion of Polish film; and 6) Polish-Ukrainian film initiatives (suspended in 2024) ([PISF, 2024a](#)).

The PISF has significantly influenced the Polish film industry, evidenced by the international acclaim of films like *Ida* (2013), directed by Pawel Pawlikowski. Winning over 50 awards, including Poland's first Oscar for Best Foreign Language Film, *Ida*'s success was bolstered by the Institute's support, which included €702,120.00 of its estimated budget of €4,212,450. This backing enhanced production, promotion, and distribution efforts, allowing *Ida* to reach millions of viewers worldwide ([Romanowska, 2016](#)). The Polish Film Institute co-finance film production, distribution, and promotion projects while developing cinematographic infrastructure. It prioritises the preservation of film cultural heritage, offers expert services to public administration, and supports film archive maintenance.



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Additionally, the PISF fosters the Polish independent film industry, especially small and medium-sized companies. The Institute prepares annual reports for its operations, which serve both internal purposes and public administration, particularly for the Minister of Culture and National Heritage. Furthermore, PISF initiates research projects, conducts commission analyses, and gathers expert opinions to inform its future directions and policies.

One respondent highlights the inadequate funding for the Polish film industry compared to other countries. He states that current contracts total around PLN 460,000,000 (around €100,000,000) for distribution and production, whereas an average American blockbuster costs about \$100,000,000 (Int. Pol2). Furthermore, the reliance on advertising taxes and ticket sales for funding is insufficient, as articulated in the respondent's remarks. The increasing complexity of co-productions further compounds the difficulties, suggesting a need for strategic intervention to bolster financial support and simplify operational frameworks. Stakeholders must consider these factors to foster a more robust film industry in Poland. One of the key measures was the establishment in 2019 of a financial incentive system in the form of 30% reimbursement of eligible costs incurred in Poland. This programme is available for domestic and international productions, covering feature films, series, animation, and documentaries.

Despite these support mechanisms, international co-productions still face many challenges, such as complex political frameworks, cultural differences and difficulties in managing cooperation between partners from different countries. Therefore, there is a need for further strategic action to strengthen financial support and simplify the operational framework to facilitate co-production and support the development of the Polish film industry (Hammett-Jamart, 2018).

The Polish Film Commission Poland

The Polish Film Commission Poland (FCP) serves as a pivotal institution tasked with promoting the Polish audiovisual sector and facilitating international collaboration in film production (Olasz, 2018). Established in 2012, the Commission has operated within the framework of the Polish Film Institute (PISF) since 2018, thereby strengthening its capacity to administer support programmes for both domestic and foreign film producers ([Krajowa Izba Producentów Audiowizualnych, 2018](#)). As a central coordinating body, the Commission oversees promotional and logistical activities related to film production in Poland and collaborates closely with a network of regional film commissions. These regional bodies assist local and international producers by facilitating the practical implementation of projects within their respective territories. Notable regional entities



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include the Łódź Film Commission, which supports productions in the historically significant Łódź region; the Krakow Film Commission, which advocates for Małopolska as a desirable filming location; and the Mazovia Warsaw Film Commission, which aims to attract film productions to Warsaw and the Mazovia region. The Polish Film Commission's activities focus on several key areas:

- Promotion of Poland as a film destination: the institution organises marketing campaigns and participates in international trade fairs (e.g. Cannes Film Market, Berlinale, American Film Market) to increase interest in Poland as a film location.
- Logistical and advisory support: the commission assists foreign producers in selecting film locations, obtaining necessary permits and dealing with local subcontractors.
- Financial incentives for audiovisual productions: the Polish Film Commission supports the implementation of financial instruments, such as a system of tax credits and film funds, which enable the co-financing of productions made in Poland.
- Development of film infrastructure: the institution initiates measures to modernise facilities for film production, such as film studios, technical facilities and the base of professionals in the audiovisual sector.

The Polish Film Commission plays an indispensable role in the domain of international film cooperation, bearing significant economic and cultural implications. Through the strategic promotion of Polish locales and the provision of robust financial incentives, Poland has emerged as an attractive destination for international film productions. Examples include films such as Paweł Pawlikowski's *Cold War*, *The Witcher* (Netflix), and *The Grand Budapest Hotel* (partially produced in Poland), which have increased the country's recognition as a professional film production centre ([Krajowa Izba Producentów Audiowizualnych. 2018](#)).

The National Film Archive – The Audiovisual Institute

Another entity active in the area of, among other things, the international promotion of Polish films is the National Film Archive - Audiovisual Institute (Filmoteka Narodowa - Instytut Audiowizualny – FINA) ([FINA. 2024](#)). FINA operates based on, among other things, the Act of June 30, 2015, on cinematography and 30 June 2015 on Cinematography and the Act of 25 October 1991 on organising and conducting cultural activities. According to one respondent, “the National Library is



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the only most important institution in Poland authorised by the legislator to archive audiovisual works” (Int. Pol1). The institution aims to digitise, preserve, and promote Polish films at national and abroad level. Its activities include organising festivals, film reviews, and international cooperation in distributing and selling film rights. FINA promotes Polish films through international festivals and collaboration with other film organisations ([FINA, 2024](#)).

FINA is a cultural institution created by merging the National Film Archive and the National Audiovisual Institute (NINA). FINA began operations on June 1 2017, continuing the goals and traditions of both former institutions. The institute's primary mission is to preserve and promote audiovisual heritage, which is achieved, among other things, by restoring, reconstructing and digitising titles belonging to the classics of Polish pre-war and contemporary cinema. The overarching goal is to make available and promote film resources and audiovisual recordings (e.g., theatre, music, radio plays) and to create a space for meetings with filmmakers and cinema professionals. The Institute also conducts educational, cultural, and publishing activities, and it uses new technologies for audiovisual culture dissemination ([FINA, 2024](#)). The National Film Archive - Audiovisual Institute can carry out its tasks through cooperation with Polish and foreign cultural institutions, educational and scientific institutions, state and local government bodies, non-governmental organisations, the media, as well as other persons and organisational units without legal personality.

The ongoing activities of the National Film Archive Audiovisual Institute signify a substantial commitment to preserving national heritage through extensive digitization efforts, as indicated by the significant investment of PLN 22,000,000 (Int. Pol1). This initiative safeguards various resources and enhances accessibility for future generations. The importance of such institutions cannot be overstated in the context of a country that values its film legacy and seeks to enhance its cultural standing on the international stage (Hess & Najbor, 2020).

The National Cultural Centre

The National Cultural Centre (Narodowe Centrum Kultury - NCK) is a state cultural institution under the authority of the Ministry of Culture and National Heritage, whose main objective is the development and promotion of culture in Poland and abroad. It was established in 1994 and has since implemented numerous programmes to support cultural education, artistic creativity and the protection of national heritage. The main subjects of the NCK's activities are: cultural education and increasing interest in culture and the arts; development and professionalization of the cultural



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sector; promotion of Polish national heritage as an element of European cultural heritage; maintenance and dissemination of national and state traditions ([NCK, 2025a](#)).

The NCK is essential in promoting Polish culture internationally, including in the film sector. Its activities focus on supporting filmmakers, initiating international cooperation and enhancing the visibility of Polish cinema around the world. The institution is involved in promoting Polish culture internationally through cooperation with foreign institutions. It works to protect national heritage, supporting monuments and traditions. In addition, it develops modern technologies in culture, digitises resources and implements innovative solutions ([NCK, 2025a](#)).

It is also worth mentioning that the NCK is a member of the European Network of Cultural Administration Training Centres (ENCATC). Since 2015, the NCK has taken on the role of Festival Centre within the Europe For Festivals, Festivals For Europe (EFFE) project, an international initiative established by the European Festivals Association (EFA), aimed at the promotion and cooperation of the best European cultural festivals ([NCK, 2025b](#)).

Adam Mickiewicz Institute

Adam Mickiewicz Institute (Instytut Adama Mickiewicza – IAM) supports the international promotion of Polish culture, including film, by organising screenings, festivals and other events related to Polish cinema. The IAM cooperates with foreign film festivals by organising Polish film retrospectives. The IAM was established in 2000 as a state cultural institution under the Ministry of Culture and National Heritage. The Institute shapes a positive image of the country in the international arena and leads the promotion of Poland's attractive brand ([IAM, 2024a](#)).

The IAM aims to enhance Poland's role in international cultural dialogue through innovative programmes and partnerships. Showcasing Polish contributions to global arts and humanist heritage fosters a collaborative world where cultural exchanges promote mutual understanding and cooperation. The IAM's strategic goals are to popularise Polish culture abroad, build and develop relationships and partnerships, gather and share knowledge, engage audiences, and ensure sustainability ([IAM, 2024a](#)).



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Main non-governmental actors

Film Festivals

Film festivals, such as the Gdynia Film Festival, the Polish Film Festival in Gdańsk and the Łódź Film Festival, play a key role in promoting Polish films abroad, allowing meetings with international distributors and filmmakers. Respondent Int. Pol3 articulates that the significance of these festivals lies not solely in viewer numbers but in their contribution to the recognition of Polish cinematography globally. This perspective underscores the growing prominence of Polish productions within prestigious festival line-ups. According to the Polish Film Institute for 2025, more than 50 film festivals with national and international scope are planned from the winter to the end of the year ([PISF, 2025](#)).

One of the most well-established is New Horizons (Nowe Horyzonty). This festival focuses on film art exhibitions, featuring art-house style stars, experimentalists, revolutionaries and those searching for cinema's reinvention. Artistic and creative dimensions also characterise Cinergia Film and European Day of Artistic Cinema (Europejski Dzień Kina Artystycznego). On the other hand, one respondent (Int. Pol9) believes that high-quality films should be promoted at festivals - a critical view of the quality of films showcased at these festivals, suggesting a disconnect between festival selections and audience expectations. The respondent's frustration with repetitive themes, such as poverty and violence, indicates a need for more diverse narratives that resonate with contemporary audiences. Thus, while film festivals play an essential role in elevating Polish cinema, the critique highlights an imperative for curators to prioritise quality and innovation in film selection. In conclusion, the future of Polish film promotion at festivals hinges on a delicate balance between visibility and artistic integrity.

The Network of Studio Cinemas

The Network of Studio Cinemas in Polish Film operated until mid-2005 under the programme approved by the Minister of Culture: "Promotion of film culture by introducing films of high artistic and educational value for distribution in the network of studio cinemas". Upon coming into force, the new cinematography act expanded the possibilities of the Network of Studio Cinemas programme. Currently, the network is financed from the resources of the Polish Film Institute, the Ministry of Culture and National Heritage, and the National Film Archive – Audiovisual Institute ([Stowarzyszenie Kin Studyjnych, 2025](#)).



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Many entities are distributing national and international (including European) films in Poland. Regarding national film distribution on the market, there are ITI Cinema, Kino Świat and Syrena Films. On the other hand, international productions are distributed mainly by Gutek Film, SPI International Polska, and Vivarto. Other distributors include Monolith Films, Best Films, and Vision Films. Promotion of Polish films occurs mainly through international distribution and film festivals. However, international distribution remains limited. As one respondent noted, “Polish companies have international distribution. For instance, Agnieszka Holland’s new film is currently being distributed in several countries, which presents an interesting opportunity” (Int. Pol3).

2.5.3 Programmes and cooperative arrangements

Funded exclusively by the State

Programmes of the Ministry of Culture and National Heritage

The Ministry runs two main programmes to support the development of the industry in Poland and promote Polish culture, including film, abroad. The first is called Film - its purpose is to promote knowledge of the achievements of cinematography, its role in contemporary culture, as well as support for activities that foster the development of film culture and disseminate ambitious, non-commercial film repertoire ([MKiDN, 2024b](#)). The programme is coordinated by the National Film Archive - Audiovisual Institute, which oversees the recruitment and processing of applications.

The programme is open to tasks focused on presenting achievements in cinematography concerning film festivals, film reviews, film competitions, and exhibitions on film, as well as multimedia and interdisciplinary tasks carried out, particularly online, presenting and popularising achievements in cinematography. Local government cultural institutions, whose organisers have not entered into a co-management agreement with the Minister; non-governmental organisations, and natural persons conducting business and entities conducting business may apply for funding ([MKiDN, 2024b](#)).

The 'Promotion of Polish Culture Abroad' programme aims to cultivate a positive image of Poland internationally, fostering awareness of Polish artistic and intellectual achievements. It showcases Polish culture through various forms by presenting the work of distinguished Polish artists at prestigious cultural events, ultimately portraying Poland as a modern nation engaged in intercultural dialogue and recognising its historic contributions to European culture. Activities to



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promote Polish culture are of particular importance in four equal geographic priority areas: Europe, the countries of the South Caucasus (Georgia, Azerbaijan, Armenia), East Asia (Japan, China, Republic of Korea, Vietnam), and countries important in shaping the Polish-Jewish dialogue, with particular emphasis on Israel and the United States ([MKiDN, 2024c](#)).

The Department of Foreign Cooperation of the Ministry of Culture and National Heritage manages the programme. The projected budget for the programme for 2025 was PLN 12,000,000. Cooperation must be established with at least one clearly identified strategic foreign partner to receive funding under the programme in question. The strategic partner should be a foreign cultural operator. The strategic partner cannot be a Polish foreign post (Embassy, Consulate, Polish Institute, Permanent Representation). Polish foreign posts act as additional partners in the task. When applying to the programme, there is no obligation to send confirmation of cooperation from the strategic foreign partner ([MKiDN, 2024c](#)). Local government cultural institutions whose organisers have not entered into a co-management agreement with the Minister of Culture and National Heritage, state art universities, natural persons conducting business and entities conducting business, and non-governmental organisations may apply for funding.

The Polish Film Institute programmes

The Polish Film Institute is the largest player in the Polish film market, with a mission to support various aspects of film production, which has led to considerable scrutiny regarding the equitable distribution of resources (Orankiewicz & Majer, 2018). Conversely, the politicisation of funding institutions further complicates this issue. Heinecke's research highlights the political dynamics that influence the management and distribution of funds within these institutions, often prioritising specific agendas over equitable support for all stakeholders in the film sector. Such dynamics can potentially marginalise innovative projects proposed by independent producers (Heinecke, 2016).

The Operational Programme Promotion of Polish Film Abroad

The Polish Film Institute promotes the growth of the Polish film industry by providing financial support to organisations that foster film culture and Polish cinema both domestically and internationally. It also assists film festival organisers, schools, and universities, enhances cinema facilities' technological capabilities, supports restoration efforts, and offers professional development opportunities ([PISF, 2024a](#)).



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The successful execution of the tasks mentioned above is facilitated by the Operational Programme (OP) for the Promotion of Polish Film Abroad, which had a budget of € 1,872,135.20 allocated for 2023. The objectives of the OP for the Promotion of Polish Film Abroad are to promote and disseminate Polish filmmaking, establish conditions conducive to the development of film co-production, and support the artistic and professional growth of filmmakers and producers. Promoting Polish film abroad is implemented through three primary objectives: **(1)** Promotion of Polish film abroad; **(2)** Distribution of Polish film abroad; **(3)** Provision of international scholarships ([PISF, 2024a](#)).

The effectiveness of the Institute's initiatives to promote and enhance the competitiveness of Polish cinema appears considerably limited. As noted, "what has been overlooked at the Polish Film Institute is certainly production. There have been various programmes aimed at international promotion, with the most notable being Martin Scorsese Presents, which showcased ten Polish films; however, this remains insufficient" (Int. Pol3). This observation underscores a critical need for a more robust and comprehensive strategy in supporting Polish cinema on the global stage 30% ([PISF, 2018](#)).

Cash Rebate incentives

Other forms of financial support offered by the institute include the 30% Cash Rebate incentives for filmmakers at national and international levels. Introduced in February 2019, these incentives are governed by the Act on Financial Support for Audiovisual Production and provide a 30% reimbursement of production costs incurred in Poland as part of eligible expenditures ([PISF, 2018](#)). Reimbursement applies to feature films, animated films, documentaries, and series. This refund is available for Polish and international productions, including services rendered for foreign productions (referred to as 'services') ([PISF, 2018](#)).

Prizes awards

The Polish Film Institute recognises and rewards significant contributions to promoting Polish cinema through its cash prize awards. Since 2008, as part of the Polish Film Festival in Gdynia, the Institute has presented the Polish Film Institute Awards in nine categories: (1) Cinema; (2) Film Event; (3) Promotion of Polish Film Abroad; (4) Film Criticism; (5) Film Education; (6) Film Book; (7) Distribution of Polish Film; (8) Film Discussion Club; (9) Film Poster ([PISF, 2024c](#)).



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These awards honour individuals and institutions that have played a pivotal role in advancing film culture, supporting Polish cinema, and enhancing access to Polish filmmaking. Cultural institutions, film schools, local authorities, non-governmental cultural institutions, and other entities within the cultural sector may submit nominations ([Stowarzyszenie Filmowców Polskich, 2024](#)).

An interviewee indicates that the Polish Film Institute invests in enhancing the competitiveness of the Polish film market through subsidies for participation in major Polish and international film festivals. However, there exists a notable underestimation of smaller festivals, which serve as significant platforms for film exposure and promotion. The interviewee asserts, “Recently, there has been a way of thinking at the Institute that only the most important festivals are significant, and the less important ones are somehow unimportant at all” (Int. Pol3). This statement underscores a critical need to reassess the value attributed to various festival tiers in promoting Polish cinema. For example, Pedersen and Mazza discuss the broader context of international film festivals, noting that the prestige associated with major festivals like Cannes and Berlin tends to overshadow smaller, yet equally significant, events (Pedersen & Mazza, 2011). Their analysis suggests a systemic bias within festival culture that favours well-established events, though the reference does not directly address how this bias affects funding strategies or the PFI's approach. Therefore, while their insights are relevant, they should be considered within the context of supporting smaller festival dynamics.

The National Film Archive - Audiovisual Institute programmes

The National Film Archive - Audiovisual Institute's responsibilities, as delineated in the organisation's status, encompass the collection and provision of access to national and international audiovisual heritage materials, including film. These responsibilities include the co-creation, production, recording, and promotion of cultural works of exceptional artistic merit; the production of audiovisual materials addressing cultural, scientific, and educational themes; and the execution of educational, cultural, and publishing initiatives. Furthermore, it supports the organisation of film and film-related events, undertakes digitisation and internet projects, initiates educational and research activities, and coordinates the meticulous process of proper film archiving ([FINA, 2024](#)).

One respondent (Int. Pol1) identifies 2017 as a pivotal year in the evolution of the Institute's film policy, marking a transition from a narrow focus on archival resources to a broader, more diversified and international approach. This shift reflects an increasing awareness of audience



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preferences and the necessity for the film archive to adapt to contemporary and international demands. The respondent articulates the need for the institution to redefine its role, transitioning from mere archival preservation to a proactive engagement in film expertise. This encompasses not only the long-term preservation of films but also the dissemination of knowledge and professional development within the field. Such a transformation underscores the importance of aligning institutional objectives with audience expectations, thereby fostering a more dynamic and responsive film policy framework. The importance of aligning institutional objectives with audience expectations has been underscored in various studies focusing on cultural institutions adapting to modern needs (Kanecki, 2024). Adaptability in cultural policies is crucial for institutions that operate in dynamic environments influenced by societal trends and audience engagement (Willems, 2017).

The institute's key activity involves implementing the government programme on culture and the protection of national heritage, referred to as Film. In 2023, the institution provided financial support for various television productions (for example a 26-episode documentary series entitled 'History of Polish Cuisine'). Additionally, the institution published FINA books and CDs, organised a concert to commemorate the 78th anniversary of the conclusion of World War II, co-hosted musical events with various institutions and festivals, financed the operations of the Centre of Competence for Digitisation, and conducted a scientific conference entitled "Polish Film Goes to the World! Export practices and foreign reception of domestic audiovisual production" ([FINA BIP 2023](#)).

Respondent Int. Pol1 posits that the FINA ought to implement regular audience preference surveys, thereby highlighting the efficacy of prior initiatives. An exemplary project, entitled 'Poles about Polish Film', investigated cinema viewer behaviour through collaboration with university sociologists, adhering to rigorous scientific research standards. Furthermore, Int. Pol1 advocates for enhanced international cooperation, citing the European programme as a notable endeavour. This initiative facilitated collaboration amongst European film archives, contributing to the establishment of a shared platform for significant film productions. Int. Pol1 emphasises the vital role of film education through social media, particularly on platforms such as TikTok, as a means of equipping young individuals with essential storytelling and technical skills. This educational approach is crucial for adapting to contemporary communication methods and fostering a new generation of filmmakers in the contemporary international film market.



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The National Cultural Centre programmes

The National Cultural Centre (NCK) runs several programmes for the international promotion of Polish culture and cinematography. One of its key activities is grant funding programmes. The principal programme for promoting the Polish film industry is 'Promotion of Polish Culture Abroad,' aimed at presenting significant Polish cultural phenomena internationally and building lasting relationships with foreign audiences.

Another activity is a cultural and educational project: Accessible Culture in Cinemas. This initiative allows the general public to access award-winning Polish films in cinemas, indirectly supporting their promotion outside the country ([NCK, 2025b](#)).

The NCK coordinates the National Centre for Film Culture (NCKF) in Łódź, Poland ([NCKF, 2025a](#)). It is a centre for film education and the dissemination of cinema knowledge, as well as organising festivals and film reviews and working with international partners. One example of the Łódź Centre was the opening in 2023 of the world's largest exhibition on Polish cinema, titled Polonia Cinema ([NCKF, 2025b](#)).

It is also worth mentioning that within the framework of Poland's presidency of the Council of the EU (2025), NCK is involved in the organisation of numerous cultural events, such as concerts, performances, exhibitions and film screenings, both at home and abroad, promoting Polish culture on the international arena ([MKiDN, 2024](#)).

The IAM programmes

The Institute is dedicated to creating and collecting documentation on Polish culture, including films, recordings, and publications. This material is accessible to interested parties, particularly Polish cultural institutions abroad. Its activities focus on key domains: Film, Classical Music, Visual Arts, and Theatre. Additionally, the Institute operates a grant programme called Cultural Bridges. One respondent highlighted the Institute's key role in financing and enhancing the competitiveness of the Polish market on the international stage (Int. Pol7). The respondent explains that while there is a multitude of domestic entities capable of financially supporting film promotion, funding for international promotion remains inadequate. The analogy of the Polish Film Institute as a 'queen mother' signifies its central authority; however, it also acknowledges the contributions of other organisations, such as FINA and the National Centre for Culture. These institutions, along with the IAM and the Ministry of Culture and National Heritage, represent potential funding sources.



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Nevertheless, the respondent's assertion regarding the inaccessibility of funds for international promotion highlights a critical gap in support for Polish cinema's global outreach. The Institute undertakes many promotional activities covering many fields of art, including film. Examples of past activities include such promotional projects as the Polish Season in France 'Nova Polska', the Polish-German Year, the Polish Season in Russia and the Russian Season in Poland with the 'Warsaw-Moscow/Moscow-Warsaw' exhibition, the Polish Year in Ukraine and the Ukrainian Year in Poland, the Year of Jerzy Giedroyc, etc. ([NCK, 2018](#)).

Recent programmes include 'Mov(i)e Flow - Polish Dance Film Showcase & Mentoring'. This programme, implemented in cooperation with the M4Culture Foundation, aims to popularise Polish dance films abroad. It offers a support platform for filmmakers, combining competition, mentoring and promotion and distribution at international film festivals ([IAM, 2024b](#)).

Another initiative is the 'filmPOLSKA Festival', where the institute supports the organisation of its 19th edition in Berlin. This festival showcases the work of emerging Polish directors, noted for their distinctive film language ([IAM, 2024c](#)).

Regional Film Funds

The Regional Film Funds are effective and attractive local support mechanisms for audiovisual production. Established by local governments, they reflect the authorities' recognition of the region's role and potential in creating favourable conditions for filmmaking development ([Stowarzyszenie Filmowców Polskich, 2012](#)). The City of Łódź Film Fund was the first to be founded in 2007, with the newest addition being the Gdańsk Fund in 2022. Currently, Poland counts ten such funds operating within provincial or municipal cultural institutions across the country, located in Szczecin, Wrocław, Gdynia, Lublin, Łódź, Kraków, Katowice, Kielce, Poznań, and Warsaw ([Krajowa Izba Producentów Audiowizualnych, 2023](#)).

Polish Professionals' Views on the Distribution of Film Funds

The allocation of ministerial funding within the Polish film industry raises significant concerns regarding its efficacy and fairness. One respondent (Int. Pol11) notes that a substantial portion of ministerial funds is directed towards public institutions, which possess their own financial resources. This misallocation results in a failure to support the survival of nonprofit entities, which are increasingly reliant on external funding in the current economic climate. The respondent



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articulates this concern, stating, "3/4 are public institutions that have their own budgets anyway, e.g. cities", thereby highlighting the inequitable distribution of resources (Int. Pol11).

The inadequacy of financial support for private producers is underscored by Int. Pol9, which asserts that public institutions should provide greater assistance to these stakeholders, as they are crucial in realising film projects. This sentiment is echoed by Int. Pol1, who critiques the historical lack of funding for cultural initiatives, indicating a broader systemic issue within the Ministry of Culture and National Heritage. Additionally, the politicisation of state bodies exacerbates these challenges, as noted by Int. Pol5, which reflects on the detrimental impact of political management on the support mechanisms for Polish cinema. Political influences can significantly impact the allocation of resources, often leading to favouritism towards institutions with established political ties, as mentioned by several respondents. This politicisation is further echoed by studies on public policy that stress the need for systematic reassessment of resource allocation processes to enhance fairness and support for independent creators (Báez & Fernández, 2014). Therefore, a systematic reassessment of funding mechanisms, including an enhanced focus on international co-productions, is imperative to address the evolving challenges within the European film landscape (Int. Pol12). Such reforms are essential to ensure the long-term sustainability and growth of the Polish film industry.

As highlighted by Int. Pol8, these funds are vital tools for supporting local filmmaking by enhancing infrastructure and promoting international cooperation. This view aligns with the broader recognition of regional funds as crucial public support sources alongside the Polish Film Institute, substantially contributing to the development of the cinematographic sector. Films co-financed by these Funds include Agnieszka Holland's Oscar-nominated *In Darkness* (PL, DE, CA 2011), as well as Paweł Pawlikowski's *Ida* (PL, DK, FR, UK 2013) and *Cold War* (PL, UK, FR, BE 2018) (Kostovska, 2024).

However, Int. Pol11 voices concerns regarding the equitable distribution of public funding, noting that these funds tend to favour already well-resourced cities, marginalising less prominent regions. This imbalance underlines the need for a more equitable allocation of resources to ensure that all regions can benefit from the growth of the film industry. Therefore, while regional funds play an essential role in nurturing local talent and infrastructure, their overall impact is limited by systemic disparities in funding distribution. Orankiewicz and Majer (2018) emphasise trends in the Polish film industry, particularly the significance of regional financing through the Polish Film Institute and



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co-financing schemes, which empower smaller independent productions and foster a diverse film ecosystem.

2.6 Finland

2.6.1 Objectives

In 2024, there were 48 domestic first releases of feature-length films in Finland. The market share of domestic films was 32%, a figure considered high by European standards ([FFF, n.d.](#)). In 2023, 722 Finnish films, including feature-length films and short films, were screened at international festivals ([FFF, 2024](#)). This is less than in the record year 2019 (950), but otherwise there has been a growing trend since 2011 (417), when the Finnish Film Foundation (FFF) started collecting statistics on festival screenings ([FFF, 2022b](#); [FFF, 2021b](#)). In quantitative terms, therefore, the internationalisation of the Finnish film industry seems to be progressing well. A slightly different perspective is offered by the directors, writers and actors who responded to a survey asking about the level and relevance of Finnish cinema internationally. Although they felt that there had been a positive development in recent years and that both the quality of films and their promotion had increased, they felt that Finnish cinema was not at the same level as in other countries. They cited low film budgets as the main reason for this. A lack of courage and vision on the part of financiers were other reasons ([Cañas-Bajo, 2023, p. 9](#)). All the film professionals interviewed for this report agreed that the Finnish Film Industry is more competitive now than at the beginning of the millennium (Int. Fi1–11).

In Finland, the international promotion of national cinema is primarily managed by the FFF. Other organisations that promote Finnish audiovisual works and receive funding from the state are Audiovisual Producers Finland (APFI), Business Finland and its production incentive, and Taike – the Arts Promotion Centre Finland. In addition, Finnish films are promoted by the Audiovisual Centre AVEK and the industry event The Finnish Film Affair. Outside Finland, the umbrella organisation The Five Nordics is responsible for promoting Nordic cinema notably through the Nordic Council Film Prize. The present situation is such that the government has reduced the budget of the FFF, the most significant supporter and promoter of Finnish cinema, resulting in a reduction of funds for international promotion.

The objective of international promotion is to make Finnish films known internationally by taking films to festivals and marketing them at industry events, to advance their distribution and exhibition



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abroad as well as to encourage international cooperation through various forms of support. It also aims to attract foreign filmmakers to Finland and help them find local partners. The aim of promoting Finnish films is partly financial - to sell them - and partly to export Finnish culture. Films are seen as a means to promote Finland's image, tourism and democratic values ([FFF, 2023b](#)).

As Finland has a small film industry, most of the financial resources allocated by the state to promote cinema are directed towards the domestic market. However, there has been an increasing focus on internationalisation since the turn of the millennium. The period 2006–2010 is considered to be Finnish cinema's transition period towards internationalisation ([Mäkelä, 2017](#)). The biggest challenge in film promotion is that state funding has not increased in line with production costs. Even the recent international success of Finnish films has not resulted in increased state support. Due to its limited resources, cooperation with other Nordic countries is of the utmost importance for the Finnish film industry.

2.6.2 Actors

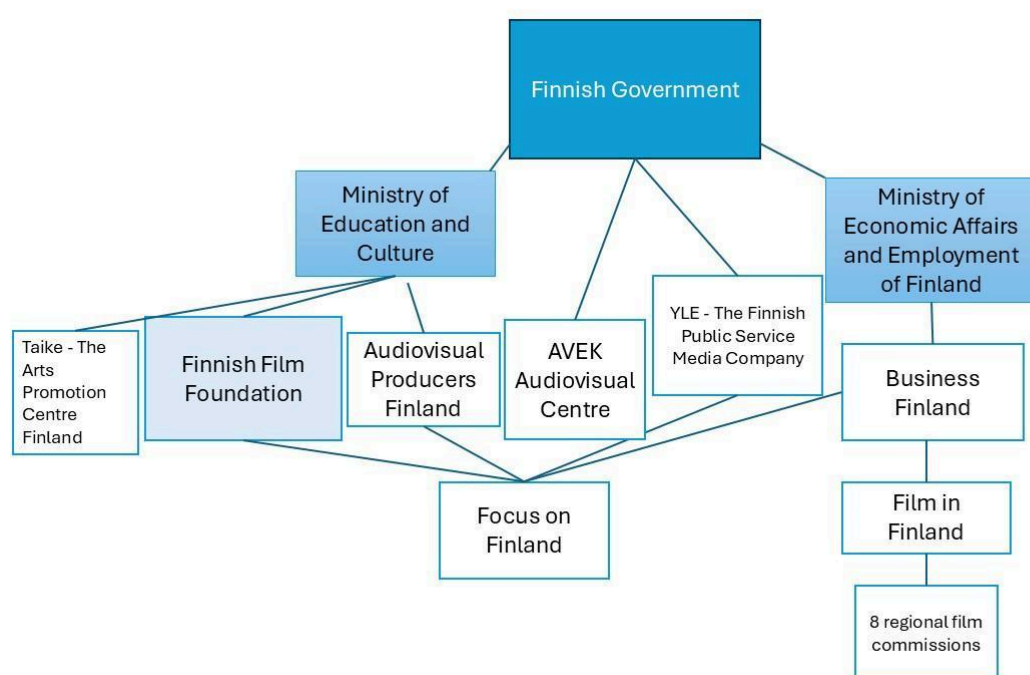


Figure 27 - Finnish Film Industry: International Promotion Actors Map

Finnish film foundation

The FFF is the main funder and promoter of the Finnish film industry. It was founded in 1969 as a response to the crisis of commercial cinema, drawing inspiration from the Swedish Film Institute



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([Kinnunen, 2019, p. 7, 11–12](#)). It is an independent foundation that operates under the supervision of the Department for Cultural Policy of the Ministry of Education and Culture. The FFF is guided by the State Aid Act, The Film Promotion Act and its Decree, and the European Commission notification on state funding for film. The second section of the Film Promotion Act states the aims of the FFF, which are: “to promote 1) diverse and professional domestic film production, 2) extensive and encompassing supply and distribution of film, 3) the internationalisation of domestic cinema and its creators, and 4) film culture and its development. The starting points for realising these aims are participation, pluralism, cultural diversity, and the freedom of art.” ([FINLEX 1174/2018](#))

Given its core objective of promoting domestic film production, the activities of the FFF are mainly focused on Finland and international promotion has always been a much smaller part of its operations, 'a sideline', as a previous expert of the FFF pointed out (Int. Fi6).

The FFF receives its funding through the Ministry of Education and Culture from the lottery (Veikkaus) and the pooled funds allocated for the promotion of film art ([FFF, n.d.](#)). It must lobby for the annual allowance from the Ministry (Mäkelä, 2017, p. 67). The FFF supports filmmaking in its different phases through screenwriting grants, development support and slate development support, production support, exhibition and distribution support, and international promotion ([FFF, n.d.](#)). In 2023, 41% of production financing for Finnish feature-length fiction originated from the FFF. For documentary films, the FFF's share was 45%. ([FFF, 2024](#)).

The FFF does not pursue financial gain or other self-interest, but “it aims to make the film sector thrive” (Kinnunen, 2019, p. 9). Väinö Mäkelä ([2017, p. 64–65](#)), describes the FFF's role in terms of ecosystem-based approach as follows: “the Foundation's only mission business wise, is to make the industry thrive and nurture the ecosystem [...]. It shares information and in this sense spurs economic growth in the ecosystem, without directly competing with other ecosystem members.”

The FFF helps producers and filmmakers “on issues related to internationalisation in all stages of filmmaking” ([FFF, n.d.](#)). This task falls mainly on the FFF's international department, which is responsible for the promotion and cultural export of Finnish cinema. The personnel of the international department consist of five experts, the head of the department, three advisors, one for feature films, documentary films, and short films, and a festival coordinator. The advisors work with finished films that have received funding from the FFF to gain international exposure for the



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films. The FFF has no rights to the films it funds, not even festival rights (Int. Fi1). Therefore, it does not sell or distribute the films but assists producers find markets and distribution for the films it has supported. Its role is to act as an intermediary between Finnish filmmakers and producers and (international) sellers and distributors (Int. Fi4, Int. Fi5). In other words, it helps bring film professionals together (Int. Fi3).

Throughout the years, only about 3% of the FFF's budget has been allocated for international promotion. In 2023, the amount was only 2.5% (see Table 1). The biggest challenge of international promotion is limited financial resources, which have not grown in the same proportion as the production budgets of films and the number of Finnish films that have received international attention. During its existence, the number of personnel in the international department has increased by only one (Int. Fi3). The reason cited for the stagnation of the FFF's overall funding was that politicians and officials at the Ministry of Education and Culture do not see the value of cinema (Int. Fi1). Despite limited resources, the FFF engages in many activities to promote Finnish cinema internationally.

The main aim in terms of promotion is to get films to as many important international film festivals as possible. For this purpose, the international department builds a festival strategy for each film to be promoted. A promotion plan for half a year or a year is drafted for the films. Careful consideration is given to which festivals would suit each film. The strategy includes meeting the experts who choose films for festivals. When a suitable festival has been found, the communication department promotes the film to the FFF's customers and collaborators (Int. Fi4). At the festivals, the representatives of the FFF and the filmmakers attend markets where, for example, distribution deals are negotiated. The international department does a lot of practical work such as sending screening links and marketing material to the festivals (Int. Fi2, Int. Fi3).

In building a festival strategy, the FFF co-operates with sales companies and production companies. Only films that are considered to have international potential are selected for promotion. Films whose subjects are mainly of interest to Finns, such as historical (war) films, comedies, or portraits of national notables, are usually not promoted internationally. Films to be promoted may include feature-length fiction films and documentaries or short fiction films and short documentaries.



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The international promotion of Finnish films focuses on major film festivals rather than on specific geographical areas. However, based on the interviews, it appears that there is less activity in areas that are culturally very different. For example, Africa was mentioned as a difficult area, due to the limited number of established festivals, and the rapidly changing conditions. It is also not possible to go to the Middle East for political and ethical reasons (Int. Fi6). However, the Arab countries were mentioned as a region with potential future outreach (Int. Fi2).

The FFF grants various forms of financial support to filmmakers and producers, which will be described in more detail below. In addition to financial support, the international department helps filmmakers to network internationally and organises international training programmes. The FFF arranges Finnish film weeks, showcases, pitching, and other networking events around the world, some of which are in collaboration with The Five Nordics. Not all these actions aim to sell Finnish films. One of its tasks is cultural export, that is, to make Finnish art and culture known abroad. In other words, financial success is not the only aim even if it may be the most important one (Int. Fi3).

According to a representative of the international department, more pitching events than ever are arranged for short films nowadays, and these are important networking events, especially for young filmmakers who are interested in making international co-productions. The interviewee mentioned the young filmmaker Aino Suni and her debut feature film *Heartbeast* (*Sydänpeto*, 2022) as an example of a film that went into production thanks to such pitching events (Int. Fi4). Some of the above-mentioned activities take place in cooperation with Finnish embassies and Finnish cultural institutes (Int. Fi1). Inviting international guests to the biggest Finnish film festivals such as Helsinki International Film Festival and DocPoint is one form of promoting Finnish cinema (Int. Fi5). The FFF also publishes an international newsletter, which includes information about upcoming Finnish films.

The FFF helps Finnish production companies find international partners and financing for their films. The main international partners in this effort are Creative Europe's Media programme, Nordic Film & TV Fund, and Eurimages ([FFF, n.d.](#)). The FFF's Head of Production is Finland's representative in Eurimages (Int. Fi7). The FFF also grants production support to international majority and minority co-productions that have a Finnish co-producing partner. Funded co-productions must have some form of distribution in Finland, Finnish technical or artistic input,



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and the film must be relevant to Finnish audiences ([FFF, n.d.](#)). It is not specified what “relevant for Finnish audiences” means.

In addition to cooperation in the fields of financing and training, the FFF works closely with several international organisations to develop the film industry. These include the European Film Agency Directors (EFAD), the European Film Agency Research Network (EFARN), The Five Nordics (previously called Scandinavian Films), the European Film Promotion (EFP), the European Film Awards, and The Nordic Council Film Prize ([FFF, 2023b](#)). In international promotion, The Five Nordics and EFP are the FFF’s closest collaborators.

Audiovisual Producers Finland

Audiovisual Producers Finland (APFI), established in 2018, represents the interests of producers in the field of audiovisual content production, promotes internationalisation, organises domestic industry events and competitions, manages responsibility projects, and is responsible for the collective management of copyrights. APFI has approximately 125 member companies. APFI cooperates with local and international sister organisations and key partners including Business Finland (for more about Business Finland, see the section 'Business Finland’s production incentive'), the FFF, and the seven regional film commissions in Finland.¹⁶ According to APFI’s website (APFI, n.d.): “We are responsible for joint export promotion activities to strengthen the visibility, competitiveness, and international recognition of Finnish audiovisual content and Finnish production companies.”

The FFF and APFI mainly operate in different areas, the FFF concentrating on the promotion of feature-length fiction, documentary films as well as short films and APFI on television series, documentary films, and animation films. “APFI manages export promotion to the extent that the Film Foundation does not” (Int. Fi10). It does this with the cultural export support of the Ministry of Education and Culture. APFI promotes mainly the works of its members, but also the documentary films of smaller production companies that cannot afford to pay the membership fee (Int. Fi10). The techniques of promotion are the same as those used by the FFF. Taking filmmakers to festivals with their films is the main form of promotion but also presenting works that are still in the development or production phase (Int. Fi10).

¹⁶ The seven [regional filming commissions](#) offer information about filming locations in Finland, provide services to production teams, connect productions with local partners, and provide help and guidance.



APFI coordinates an export venture, Focus on Finland, which was established in 2020. Focus on Finland is APFI's main tool for promoting Finnish films. Focus on Finland will be described below in the section Specific National-Funded Programmes. APFI markets Finnish know-how in various events, produces information about international audiovisual markets, and advises companies in the internationalisation of their television or film projects. APFI implements numerous internationalisation projects each year with the support of the Ministry of Education and Culture. It organises various forms of training for Finnish producers and grants the following awards: XYZ-award, Producer of the Year, Hulda Export Award, and Screen Act of the Year. APFI is a partner of the Jussi Gala, Finland's most important award in the film industry.

According to an APFI's representative, the most important institutional mechanism for promoting the Finnish film industry internationally in Finland is the FFF's work on export promotion. Enabling filmmakers to participate in film festivals is the most important form of support for films (Int. Fi10). In other words, APFI can be seen as complementing the operations of the FFF.

APFI chooses the films for promotion together with its partners by carefully handpicking them or sometimes through an open call. They look for a common theme or thread for showcases. They aim for fairness when choosing films for promotion so that different films will be chosen for different events. They try to be transparent and give constructive feedback. In practice, APFI does not promote short films or feature fiction films, because the Film Foundation promotes those. The core value that guides APFI's operations in promotion is business growth: "The focus is on growth and internationalisation and business profitability. Since we are such a limited market in terms of geography and language area, the only direction from which growth can come is from outside the borders of Finland." The strength and well-being of domestic cinema and ensuring that films can be produced were mentioned as other important values (Int. Fi10).

APFI aims to start promotion in the development phase by looking for more financing (partners), sales, and distribution for projects still in production. They start promotion earlier than the FFF, which mainly promotes finished films. They aim to get visibility for the films in markets and get international media to publish articles about them. This is a way of getting people to see the works, to finance, sell, and distribute them. The brand Focus on Finland is a way to highlight Finland. An international PR person helps get the articles published and to get prime slots at markets. The interviewees emphasised that after the markets it is important to organise events for guests. Networking, in other words, is an important, if time-consuming, part of the promotion (Int. Fi11).



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Regarding values, one of the two representatives interviewed says that topics must be interesting to international audiences. According to this interviewee, Finnish works stand out in a good way from other Nordic countries because of their subjects, and this is true especially of documentary films. Documentaries must have compelling social topics (Int. Fi11).

When discussing the challenges of promoting Finnish films internationally (in general terms, because APFI does not promote feature-length fiction films) the other interviewee saw as one challenge how to stand out amid the vast amount of content and capture attention. The interviewee argued that in terms of quality Finnish films are on the same level as other countries but suggested that certain stereotypes of Finnish content exist and wonders if the vision of Finnish cinema in people's minds is still related to Kaurismäki's films. Will the quality of the content reach the same competitive level as the production? The budgets of Finnish films are still smaller than the budgets of films in the other Nordic countries. Also, the resources of promotion are rather limited, and in 2024 even more limited than earlier. Cost efficiency is Finland's competitive advantage in the current difficult market situation. Finland can produce significantly more effectively good-looking content. "Although we don't want to be a cheap production country, yes, it is currently an advantage" (Int. Fi10).

According to APFI's representative, skilled people are working in promotion, but the difficulty is the scarcity of funds. There are too many good projects competing for the available funds. The interviewee commented on the situation of documentary films, making a comparison with the FFF's situation: "Documentaries are currently underfunded. But it is difficult because there is no money. So, it is really hard, not even the Foundation can suddenly raise the support amount for documentaries, because it [the money] is out of elsewhere. So, it is a difficult situation for all, but especially for documentaries" (Int. Fi11).

In addition to its work through Focus on Finland APFI provides consultation (development, script writing, concept development) and participates in Scandinavian Screening, which is a market for Nordic television content. It is the initiative of the Nordic public service media companies DR, NRK, RUV, SVT, and Yle. Scandinavian Screening provides international broadcasters access to television programmes from the Nordic countries.

APFI is involved in the Growth Deal for Creative Industries (Kasvusopimus). It is the first of its kind in the audiovisual industry and was initiated by the Ministry for Education and Culture and the



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Ministry of Economic Affairs and Employment. It is funded by the EU. It “is a new tool to foster continuous dialogue between the public and the private sector”. It is described as an action plan, which lists the objectives and the measures. According to Business Finland’s webpage: “The measures defined in the Growth Deal will primarily focus on supporting the growth and internationalisation of the companies in the industry.” Internationalisation is thus one of its objectives. At the moment, the funding of the Growth Deal has ended and according to the interviewee, the work now continues on a voluntary basis (Int. Fi10).

The most important strategies for the international promotion of Finnish films according to the representative of APFI are centralisation and cooperation for which The Five Nordics (previously known as Scandinavian Films) is an important organisation (Int. Fi10). Important strategies include networking and ensuring continuity, such as working under the same, familiar name, Focus on Finland. Nordic Animation promotes animated films, which is one of the focus areas of APFI. Cooperation helps bring visibility to films, get good slots for films at events, and get people’s names on the guest lists of the markets and other events (Int. Fi11).

Geographically APFI’s promotional activities focus on Central-Europe where there are the most important markets, most money, and interest for Finnish content. In the EU, APFI has the closest relations with France and Germany because most of the events APFI attends are organised in these countries (Int. Fi10; Int. Fi11). The second most important area is Eastern Europe. A lot of products go there, but in euro terms, it is not very profitable. According to the interviewee, Denmark and Sweden are not interested in Finnish drama series. Australia, Korea, and South America were mentioned as target areas outside Europe. Another important destination is North America, but going there is restrained because organising events there is expensive. APFI has participated in American Film Market and Sundance (Int. Fi10). Going to new geographical areas was perceived as often difficult because of cultural and political reasons. One of APFI’s projects in China proved difficult due to various regulations and cultural barriers (Int. Fi11).

APFI’s representative found it difficult to say how the EU could promote European cinema outside Europe in practice. APFI does not collaborate with EFP. According to APFI, small markets benefit from cooperation with large ones like France because it helps the small ones to “join the tables”. Film markets arranged in France are good opportunities to find support for co-productions (Int. Fi10, Int. Fi11). Co-productions were seen as an advantage for the international promotion of the



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EFI, because through such collaboration the partners learn about each other's cultures and the administrative aspect of the work.

AVEK Audiovisual Centre

AVEK Audiovisual Centre is part of the Finnish copyright organisation Kopiosto and supports Finnish audiovisual culture through copyright remunerations. It supports "small-scale audiovisual media art works and films". AVEK describes its mission: "We support the production of documentary and short films, short animations and media art, international promotion of the Finnish audiovisual industry, further education of professionals in the audiovisual field, and industry events and festivals" ([AVEK, n.d.](#)).

Taike – The Arts Promotion Centre Finland

The Arts Promotion Centre Finland (Taike) promotes Finnish art both domestically and internationally under the Ministry of Education and Culture. Taike supports individual professional artists as well as communities through grants and subsidies. The grants can be working grants that cover living costs or project grants. Taike has an annual budget of around € 45,000,000. These grants do not cover international promotion, but Taike has a development programme for cultural diversity and mobility, which "aims to promote the understanding of diversity in the arts, intercultural dialogue, the mobility of artists and international networks" ([Taike, n.d.](#)). The focus is on Nordic networks. The activities include events and workshops that provide opportunities for intercultural dialogue, for example, for artists with foreign backgrounds. The development programme is continuous. Previous projects organised inside the programme have focused on contemporary Sami art, equality, and anti-racism ([Taike, n.d.](#)).

Taike and KAVI, the National Audiovisual Institute, are preparing to merge in 2026. KAVI is a governmental agency under the Ministry of Education and Culture and its tasks include the preservation of films, television and radio programmes, related research and the promotion of audiovisual culture at the national level ([KAVI, n.d.](#)).

2.6.3 State-funded programmes

Focus on Finland

APFI coordinates an export venture called Focus on Finland, which was established in 2020. Focus on Finland is the first of its kind in the history of the Finnish audiovisual industry. APFI's partners in Focus on Finland are the key players in the Finnish audiovisual industry: the FFF, Yle



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(the public service media company in Finland)¹⁷, Audiovisual Centre AVEK, and Business Finland's Film in Finland (production incentive). Elisa Viihde, which oversees the digital streaming services of the Finnish company Elisa, was involved in the first year ([APFI, n.d.](#); Int. Fi10). The initiative for the project originally came from Yle. Business Finland supports Focus on Finland's events by marketing them through social media and public relations.

The aim of Focus on Finland is described as follows: "The project's aim is to strengthen the promotion of Finnish content in international industry events and increase the opportunities for Finnish content creators to get international funding, sales and distribution. Focus on Finland promotes the visibility and international awareness of Finnish content by attending panel discussions and keynotes in international industry events, as well as by organising showcases, and by creating opportunities to pitch projects and to network" ([APFI, n.d.](#)).

Focus on Finland is divided into a drama series scheme and a documentary scheme. In the drama series scheme, APFI's partners are Yle, FFF, (Elisa Viihde was involved in the first year), Film in Finland, and AVEK. In the documentary scheme, APFI's partners are Yle, FFF, and AVEK. Under Focus on Finland APFI organises around ten events per year, mainly abroad but also at the industry event Finnish Film Affair, where they organised a pitching event for drama series in 2023 (Int. Fi10).

In 2024, Focus on Finland was present at the following events: Berlinale Series Market, Series Mania Forum, MIFA, MIPCOM, IDFA, and Content London. In these events, Finnish television series, animated films and documentary films and projects have been presented and meetings with Finnish producers and filmmakers organised.

The Finnish Film Affair

Helsinki International Film Festival – Love & Anarchy organises annually the Finnish Film Affair, a three-day industry event and an international showcase of Finnish and Nordic films. Approximately 500 people participate in the event each year. The events programme includes lectures, masterclasses, workshops, panels, networking, and film screenings. ([Helsinki International Film](#)

¹⁷ Yle is an important financier of Finnish films. It is crucial for the funding of documentary and short films, and it funds partly more than half of feature-length fiction films ([Yle, 2024](#)). Yle has its own sales department, which concentrates mostly on television programmes. However, when asked about the role of public broadcasters in the institutional promotion of the national film industry internationally, the representatives of the FFF did not see what role Yle could have as a promoter of Finnish cinema (Int. Fi12 Email interview). Perhaps their answer reflects their rather strict understanding of the meaning of promotion.



[Festival, n.d.](#)). The Helsinki International Film Festival is supported by the FFF, the city of Helsinki, and Creative Europe MEDIA ([Helsinki International Film Festival, n.d.](#)).

Business Finland's production incentive

Business Finland is a Finnish state corporation, which offers companies internationalisation and financing services ([Business Finland, n.d.](#)). Business Finland administers Finland's national production incentive, which was launched in 2017. The production incentive provides opportunities for filming in Finland. It also promotes international financing for Finnish projects. In other words, both Finnish and foreign production companies can apply for support. The incentive "aims to increase international interest in Finland as a production location and to promote the development, growth and internationalisation of Finnish companies" ([APFI, n.d.](#)).

The incentive offers a 25% cash rebate for expenses that the production company has used for wages and services in Finland. The eligible costs can be up to 80% of the total production budget. The condition for fiction films to apply for the production incentive is a budget of €2.500,000 and at least 20% of foreign funding from a private funder (Business Finland, n.d.). Funded projects can be feature-length fiction films, documentary films, serial fiction, and animation. The production must take place in Finland. The budget of the audiovisual incentive for the year 2025 is approximately €10,000,000 ([Business Finland, n.d.](#)).

Business Finland manages a marketing brand of Finnish film industry, Film in Finland. Film in Finland is a "customer service point for foreign productions whilst coordinating nationwide inquiry management. It helps to reach Finnish talent, companies, regional commissions, audiovisual industry associations and governmental organisations" ([Business Finland, n.d.](#)).

Business Finland grants Exhibition Explorer Funding to enterprises to enable participation in international B2B trade fairs abroad. A condition for the funding is a minimum of four applications for the same fair ([Business Finland, n.d.](#); Int1 APFI).

AVEK support programme

AVEK supports the internationalisation of professionals and their work in the audiovisual industry. Support is given to individual professionals as well as to organisations and companies. It also supports "general international networking in the industry". Moreover, support is granted for "international parties for the distribution of Finnish audiovisual works and/or promoting their visibility". Support for international promotion is given primarily to completed works that have



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received financial support from AVEK. Documentary and short film financing forums make an exception. More specifically, support is granted for the following internationalisation activities:

- “authors for the costs of travelling to a major international festival or event where the author’s work is presented;
- international distribution of Finnish audiovisual works and the related costs;
- producers and authors for the costs of participating in international events and notable short film and documentary financing forums; the costs of producing materials that promote internationalisation on a case-by-case basis;
- other activities necessary for international distribution” ([AVEK, n.d.](#)).

There is a continuous call for applications ([AVEK, n.d.](#)). AVEK’s support for international promotion in 2023 was €138,927 and €146,252 in 2024. The corresponding amount of the FFF in 2023 was €579,925. Figures for 2024 were not yet available at the time of writing. AVEK is the third biggest financier of documentary films in Finland. Based on the FFF’s statistics during the last fifteen years, AVEK’s share of the production support of Finnish documentary films has been between 24% (2009) and 7% (2016). According to AVEK ([n.d.](#)), “The majority of the funds come from private copying levies financed from the General State Budget.”

In early 2025 AVEK announced that the source of its funding will be halved in 2025 and that therefore, its ability to support internationalisation will be limited. Only production companies can apply for funding. It is specified that the following activities are supported: the participation of documentary films in selected European film funding forums, such as Nordisk Panorama and IDFA Forum, and participation in selected training programmes, such as Eurodoc and DokIncubator ([AVEK, n.d.](#)).

The Finnish Film Foundation’s support for international promotion

The FFF’s support for international promotion includes the following three support types: project support for international promotion, material and marketing support for international promotion, and travel support. Project support is meant for the export of Finnish films, for launching a film at a festival (only prominent international festivals are accepted), or digitising films for festivals or export projects. Material and marketing support is meant for the manufacturing costs of international screening copies, preparing marketing materials, and other operations aiming for internationalisation. Travel grants for international promotion are intended to cover the travel



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expenses of the production companies or filmmakers to an international event outside Finland, where the applicant's film is being screened ([FFF, n.d.](#)).

The international department advances the selling of Finnish films abroad by granting support for the international distribution of Finnish films. This form of support was launched in 2021, and it is granted to domestic producers who then make a contract with a distributor in the target country (Int. Fi4). The purpose is to support the theatrical distribution of Finnish films in one or several countries outside Finland. The support can be used for local marketing (marketing materials and campaigns) of Finnish films, film copies, or for dubbing. The support can be given for the VoD distribution of films “for well-founded reasons” ([FFF, 2023b](#)). The condition for international distribution support is that the films have received production support from the FFF. “The aim is to encourage and support the international cinema distribution of Finnish films as well as to increase their international commercial opportunities. The aim is to support a more effective international distribution campaign for the films in order for them to reach the audiences” ([FFF, 2024](#)). This form of support is in the trial phase (Int. Fi5). The application for support is continuous ([FFF, n.d.](#)). In practice, the personnel of the international department prepares support decisions, but the final decisions are made by the board of the FFF.

The interviewed current and former experts of the FFF brought up promotion cooperation, which is done mainly with other Nordic countries through the Five Nordics. The representatives of the FFF did not see that the Finnish film industry benefits directly from the strong promotional activities of a country such as France (Email Int. Fi1). According to an expert from the international department, collaboration with the Nordic countries has intensified in the last couple of years, “because that's the way it is, that in many ways we are still quite similar units that operate in the same way. And then precisely the fact that when we are the only actor in our own countries that shares the national production support and that supports movie theatre operations and that has this international department, it is very natural that that knowledge and experience is shared and that these things are done together. Just because, for example, if Finland alone were to rent these spaces from one of the Cannes or Berlin Markets, it would be ungodly much more expensive than if we were all five together, so we can share the costs” (Int. Fi2).

The Nordic countries try to compensate for their smallness by collaborating through the above-mentioned umbrella organisation The Five Nordics. Still, there are big differences in the budgets of the five institutes. Denmark's institute for example has a budget of €15,000,000 and



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FFF less than €3,000,000 (Int. Fi1). Further details on the support for international promotion granted by FFF is available in [Annex IV](#).

2.7 Denmark

2.7.1 Objectives

The actors involved in the international promotion of film in Denmark support the whole value chain of the film industry with multiple goals: economic, artistic, social and cultural. This has been extensively analysed by scholars as supporting a broader ambition, that is, using film “as a significant tool for branding Denmark as a creative and culturally rich nation abroad” (Bondebjerg, 2016, p. 25 cited in Zhai, 2024). Indeed, “Danish cinema as a distinctive national brand aligned with the auteur tradition can play a crucial role in promoting Danish culture worldwide and boosting Denmark’s image” (Zhai, 2024). The strength of the Danish film industry has been confirmed by MacPherson’s analysis, which demonstrated that “the distribution of box office revenues [...] conform to the seemingly uniform Paretian distribution observed in larger markets.” That is, despite being a small market with a relatively low number of films produced per year, Denmark does not suffer “from diseconomies of scale and other structural disadvantages that would tend to produce a lower ratio of ‘hits’ to ‘flops’ than larger countries” (MacPherson, 2010, p. 1). This results from active policies taken by the Danish state and implemented through its actors and agencies, following “a stakeholder bottom up process initiated by the founders of the Dogma movement” (Vang et al., 2018, p. 648) which led to the emergence of a strong film cluster and a “noteworthy player on the global scene industry” (Vang & Jakobsen, 2013). As will be discussed in more detail below, interviewees broadly agree that the Danish model supports the production of films that not only draw audiences to theatres but also achieve international festival recognition (Int. Dk2., Int. Dk5, Int. Dk.6, Int. Dk.7).



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2.7.2 Actors

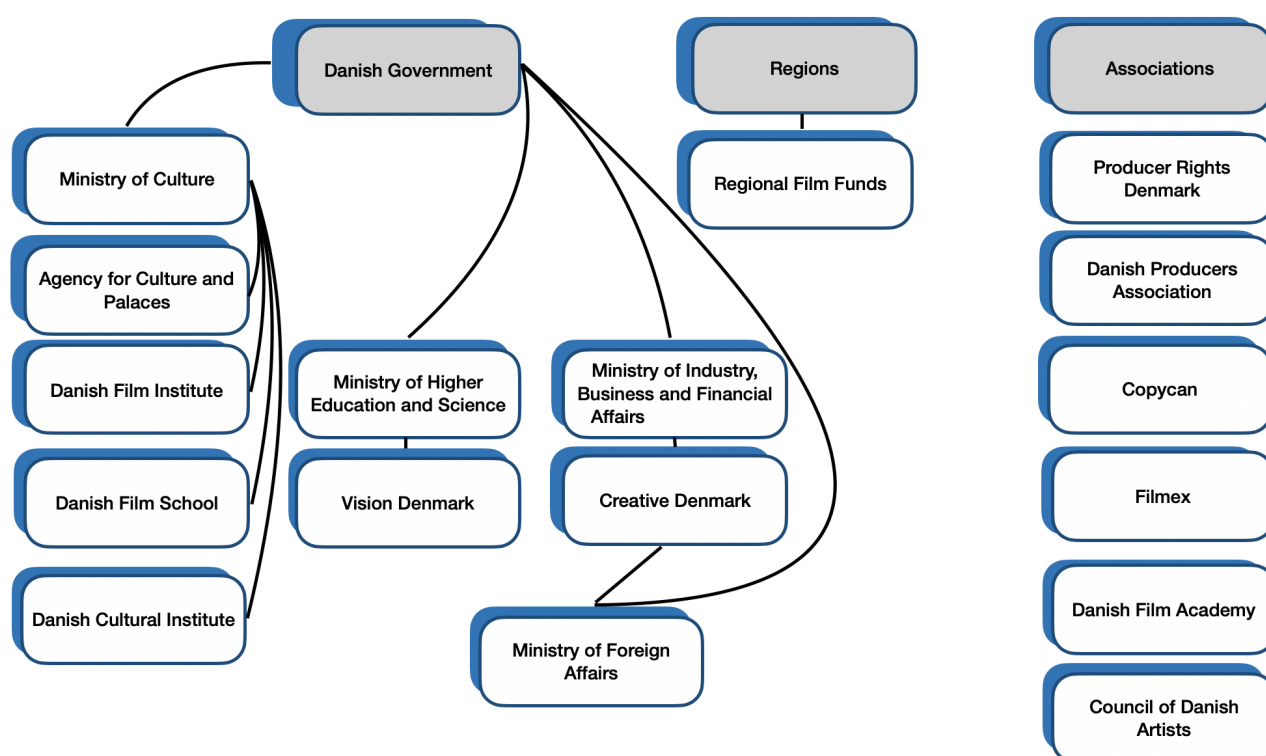


Figure 28 - Danish Film Industry: International Promotion Actors Map

State Ministries

Ministry of Culture

The Danish Ministry of Culture is responsible for initiatives involving support to creative arts, cultural heritage, archives, libraries, museums and higher education in the areas of art, music, film, theatre and dance. The Ministry is also responsible for copyright, broadcasting, sports and international cultural cooperation. It is composed of: a central division, the Agency for Culture and Palaces, which is involved in setting and implementing the government's cultural policy, namely by allocating funds to cultural organisations, and 19 cultural institutions. These latter include the Danish Film Institute (DFI) and the Danish Film School. Moreover, the Ministry provides operating grants to cultural institutions and is the primary funder of the Danish Cultural Institute ([Kum, n.d.](#)).

Ministry of Foreign Affairs

The Danish Foreign Service comprises the Ministry in Copenhagen and a global network abroad of Embassies, Consulates-General and Trade Commissions. A 2016 Review of Denmark's Foreign



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and Security Policy includes two references to culture, namely the recognition that “Denmark is located between major regional powers and shares strong cultural and historical links with other Nordic and northern European countries” ([Danish Foreign Service, 2016, p. 5](#)). However, the most recent foreign and security policy strategy ([Danish Foreign Service, 2023](#)) makes no references to culture, media, audiovisual content or film. The single reference to media is included in a section focused on increased Danish engagement in the EU’s neighbourhood, stating that “strengthened cooperation with civil society and local media will contribute to strengthening the resilience of these countries with regard to Russian attempts at influence and disinformation” ([Danish Foreign Service, 2023, p. 14](#)). Despite this, the Ministry is one of the main funders of Creative Denmark, thus indirectly supporting the international promotion of the Danish film industry.

Ministry of Higher Education and Science

The Danish Ministry of Higher Education and Science is responsible for leading and implementing policies and programmes focused on Science, Innovation and Higher Education ([UFM, n.d.](#)). Although the promotion of film is not a central focus of its work, the Ministry supports the Danish business cluster Vision Denmark, which encourages innovation in the Danish games, film, TV, animation and XR ecosystem. This establishes it as an actor whose work indirectly supports the Danish film industry and its promotion.

Ministry of Industry, Business and Financial Affairs

The Danish Ministry of Industry, Business and Financial Affairs “seeks to improve the conditions for business in Denmark. The Ministry conducts thorough economic analyses and suggests policy initiatives in areas imperative to economic growth” ([Ministry of Industry, Business and Financial Affairs, n.d.](#)). Although the promotion of film is, once again, not central in its work, the Ministry is the main funder (alongside the Ministry of Foreign Affairs of Denmark, the Ministry of Culture, the Confederation of Danish Industry, the Danish Chamber of Commerce, and the philanthropic association Realdania) of Creative Denmark, a not-for-profit, public-private partnership focused on the promotion of the Danish creative industries – including its film industry. This establishes it as another state actor whose work indirectly supports the Danish film industry and its promotion.



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Public Agencies

Danish Film Institute

The main public agency supporting film in Denmark is the Danish Film Institute (DFI). The DFI was created in 1997 as a result of the merger of three existing government institutions: the DFI, Statens Filmcentral and the Danish Film Museum. Its aim is to promote film art, film culture and cinema culture in Denmark. To do so, it funds the production and development of Danish films and their promotion and dissemination with a focus on the promotion of innovative cinema and talent development (of which at least 25% is earmarked for children and youth, as discussed in more detail below), preserves and provides access to Danish film heritage, and provides classifications and advice on films and moving images. Importantly, the DFI also awards grants dedicated to digital games ([DFI, n.d.](#)).

The activities of the DFI are framed by a four-year Film Agreement, which is in accordance with the Film Act of 1997 and is approved by the Danish parliament (the Folketing). The current agreement lasts between 2024 and 2027. In it:

- “622 DKK million has been allocated to the area each year.
- In addition, the Cultural Contribution from streaming platforms is expected to provide the industry with approx. 98 million DKK per year from 2025.
- There must be a better division of labor between the Danish Film Institute and the regional film funds in their funding allocations.
- 29% of the number of tickets sold in Danish cinemas must be for Danish films.
- The digitization of the film heritage is expanded so that Danish historical films become even more accessible.
- Every year, 8-10 Danish feature films and 10-12 Danish documentaries should be represented at the leading international film festivals.
- Smaller-selling films must be made available to audiences more quickly on digital platforms and TV” ([DFI, 2023a](#)).

This is implemented through several film funding schemes supporting Danish films and co-productions. This includes games, series, cinema culture and film education (see details below). The goal of the DFI is to “support all stages. Development, script, production, promotion,



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national, international promotion, archive. I mean, basically, we cover all the life cycle for film” (Int. Dk4).

Associations, NGOs, and other entities

Danish Cultural Institute

The Danish Cultural Institute is a self-governing institution that has been engaged since 1940 in creating mutual understanding between people. It holds a framework agreement with the Danish Ministry of Culture and, based on this, receives a fixed annual core operating grant. The institute is also funded by foundations and other external sources, with the largest amount currently coming from DANIDA¹⁸ and the EU. It is present in 15 countries, including Denmark. It has branches in China, India, and Brazil, among others, and is currently also focused on Ukraine, Georgia, Moldova, Belarus, Armenia, and Azerbaijan. Its vision and mission are the following:

We believe that art and culture are among Denmark’s most important resources. We develop international activities with partners that challenge boundaries and create mutual value and inspiration. Especially regarding equal rights, education, sustainable development, democracy, and active citizenship. Our vision is to show that the exchange of art, culture and knowledge can contribute to handling global challenges and strengthening the Sustainable Development Goals ([Danish Cultural Institute, n.d.b](#)).

As its Articles of Association state,

2. The object of the Danish Cultural Institute is to promote the international exchange of information about Danish culture, art and society in order to foster mutual understanding and to increase knowledge about foreign culture in Denmark.

2.2 To serve this purpose, the Danish Cultural Institute also establishes branches in other countries.

2.3 The Danish Cultural Institute works in Denmark and abroad with public authorities, public and private companies, institutions and organisations, and private individuals ([Danish Cultural Institute, n.d.b](#)).

¹⁸ The Danish International Development Agency (DANIDA) designates Denmark’s development cooperation, under the supervision of the Ministry of Foreign Affairs.



The Institute organises film festivals and uses film as part of its work. Its 2023 report of activities mentions several activities using film (Danish Cultural Institute, 2023). To give some examples, in 2023, its cultural centre in China opened an exhibition focused on Danish film director Carl Th, held a film festival titled 'Sustainable Stories from the North' alongside films from Norway, the Faroe Islands, Finland, Greece, showcasing films as part of the exhibition 'You See – We Feel', ran a film club in Ukraine, and held a film screening and discussion at the Ukrainian-Danish Youth House in Ukraine.

Vision Denmark

Vision Denmark is the Danish business cluster for games, film, TV, animation, and XR. Its goal is to unite the ecosystem of these sectors across Denmark to support innovation and growth. It is funded by "the EU, the Danish Board of Business Development and the Ministry of Higher Education and Science" ([Vision Denmark, n.d.e](#)). Its partners also include Filmby Aarhus, VIA University College/The Animation Workshop, The Producers' Union, and FilmFyn. The cluster organises a wide range of activities, such as knowledge dissemination activities and producer networking meetings, and invests in research collaborations to support the innovation and competitiveness of Danish companies ([Vision Denmark, n.d.](#)).

Moreover, the cluster supports innovation in film and other sectors on a project basis. This includes KREATEK, a project that led to a mapping of the technologies that are transforming the industry – including film and TV ([Vision Denmark, n.d.c](#)), AI for streamlining animation production processes ([Vision Denmark, n.d.a](#)), the Adaptation Engine (which explored the potential of worldbuilding in games and transmedia Intellectual Property, such as films and TV series; [Vision Denmark, n.d.](#)), and DATA, which – fostering a collaboration between the Danish Film School and production companies – led to a reflection on how to include "data about audiences and target groups in the development process of Danish filmmakers" ([Vision Denmark, n.d.b](#)).

Creative Denmark

Creative Denmark is a not-for-profit, public-private partnership whose mission is to increase the visibility of the Danish creative industries. It is part of the BLOX ecosystem in Copenhagen alongside the Danish Design Centre, Danish Architecture Centre, and BLOXHUB. BLOX focuses on increasing engagement with sustainable design, architecture, and urban planning through events, exhibitions, and cross-sector learning. In this context, Creative Denmark works "to match international demand for creative innovation and human-centred solutions with the vast



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competencies in the Danish creative industries” ([Creative Denmark, n.d.a](#)). Among the latter, the partnership focuses on film, TV and animation. Its English-language website provides summaries of relevant case studies as well as key figures about (namely) Danish film and compiles news about the sector across five key topics: sustainability, quality of life, partnerships, innovation, and digitalisation ([Creative Denmark, n.d.b](#)). It also supports visits by international delegations interested in going to Denmark and in connecting to relevant stakeholders, and offers free Creative Denmark Tours to international decision-makers, press and professionals ([Creative Denmark, n.d.c](#)). Moreover, the website of Creative Denmark provides a matchmaking tool to industrial actors ([Creative Denmark, n.d.d](#)).

Danish Producers Association

The Danish Producers Association (Producent Foreningen) is “the industry and employers’ organisation for Danish content producers – that is, producers of feature films, TV, documentaries and commercials” ([Producent Foreningen, n.d.](#)). It leads advocacy efforts towards policymakers, public institutions, broadcasters and other organisations that influence the working conditions of producers and the protection and commercialisation of rights (namely, by working to secure the interests of producers in film and media agreements) and, at the same time, it negotiates agreements with relevant employee groups. It also provides legal advice to its members regarding, namely, contracts, copyright, and collective agreements.

Producer Rights Denmark

Producer Rights Denmark (Producent Rettigheder Danmark - PRD) is a non-profit organisation. It manages TV and film rights on behalf of its members, that is, producers and distributors. After their rights are licensed through Copydan (see below), PRD redistributes the corresponding revenue to Danish and foreign owners of producers’ rights and to foreign cooperation partners ([Producent Rettigheder Danmark, n.d.a](#)).

As its website explains, “the rights relate primarily to exploitation comprised by the provisions of the extended collective licence set out in sections 13, 17, 30a, 35 and 50(2) of the Danish Act on Copyright (ophavsretsloven) plus the Act’s provisions on remuneration for the reproduction of works for private use (sections 39-46a). PRD does not make agreements in its own right concerning the exploitation of TV and film rights” ([Producent Rettigheder Danmark, n.d.d](#)). Most of the rights revenue that is distributed by the organisation relates to TV distributors’ retransmission and digital exploitation of TV content. However, as per its agreement with Copydan, the



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association also manages rights regarding, among others, DR Archives (the archives of the Danish Broadcasting Corporation), Film in schools and TV programmes for educational purposes. Finally, it “distributes revenue received as compensation for the lawful reproduction of audiovisual content on blank media for private use” ([Producent Rettigheder Danmark, n.d.d](#)).

Copydan

Copydan is a group of four independent rights organisations, each with their own management and board of directors, managed by the cultural and creative industry ([Copydan, n.d.](#)). The four associations are: Verdens TV (for companies that use TV, music and films), AVU-Medier (for those who use TV, music and films in teaching and) dissemination, Arkiv (agreements on the use of DR's archival programmes), and KulturPlus (a compensation scheme for private copying of TV, music and films on storage media). As briefly explained above, based on the extended collective licence set out in the Danish Act on Copyright (DAC), PRD licenses TV and film rights through Copydan on behalf of producers and distributors (e.g. retransmission of film and TV content, TV in public venues, digital services, private copying of film and TV content, copying of TV programmes by educational institutions, and the reuse of DR's and TV2's own archive production) ([Producent Rettigheder Denmark, n.d.b](#)). Then, Copydan sends to PRD the producers' and distributors' share of rights revenue and the latter ensures individual distribution and other uses of the revenue, such as KulturPlus.

Filmex

Filmex is an independent collective management organisation, which manages the distribution of remuneration to artists in the film industry according to the Copyright Act, collective agreements and other policies. Its administration is handled by the chairman of the Danish Actor's Association and Filmex's secretariat ([Filmex, n.d.](#)).

Danish Film Academy

The Danish Film Academy (FilmAkademiet) is a society of over 2800 film and TV professionals united by the goal of promoting the highest standards in their fields and, at the same time, to “promote film as an independent artform in Denmark” ([FilmAkademiet, n.d.](#)). The Academy organises an annual Awards ceremony that recognises excellence in Danish motion picture arts and sciences, including in distribution and exhibition. Moreover, it hosts activities such as workshops and masterclasses for its members. It is funded by national industry unions, foundations, the DFI and corporate partnerships.



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Council of Danish Artists

The Council of Danish Artists (Dansk Kunstnerråd) is an umbrella organisation linking Danish professional artists' organisations. Its mission is to strengthen the position of artists in society. It has 23 member organisations and, through them, represents more than 20.000 artists and cultural professionals from several sectors: film/TV, music, visual arts, performing arts, design, literature, and others. It develops advocacy efforts among politicians and policymakers, including through the Danish Parliament, the Government and the Ministry of Culture, namely regarding legislation focused on the working conditions and rights of cultural workers as well as on copyright issues ([Dansk Kunstnerråd, n.d.](#)).

2.7.3 State-Funded Programmes

Minor co-productions that are feature films

The DFI supports feature films with multiple schemes, reflecting the existence of “broad political back-up for the Danish film policy” (Int. Dk4). Namely, it supports minor co-production feature films “of high artistic quality and production value that may reach a national and international audience, as well as projects that can inspire and contribute to the development of skills in the film industry” ([DFI, n.d.h](#)). That is, cultural considerations, cultural value and cultural diversity, are given priority. Applications are assessed based on the following criteria: “the artistic quality of the project, the collaboration between the international producer and the Danish co-producer, the technical and creative collaboration, the potential for screening at international festivals, the potential for distribution in Denmark, the possibility for contributing to a diverse film culture” ([DFI, n.d.h](#)). However, the DFI adds to this list a recognition that “the editorial board prioritises projects that have artistic strength and a potential for being selected for A festivals, or projects which are foreseen as leading Nordic works capable of reaching a wide audience in Denmark” ([DFI, n.d.h](#)).

Minor co-productions that are documentaries, short fiction or transmedia films/projects

A second funding stream focuses on minor co-productions that are documentaries, short fiction films, or transmedia films/projects. The aim of this funding is “to strengthen partnerships and creative exchange between Danish and international producers” ([DFI, n.d.h](#)). The DFI supports circa 5–7 productions with this funding stream, recognising the importance of these opportunities “for the Danish industry, including international financing, cultural and business exchange as well as distribution” ([DFI, n.d.h](#)). This is reflected in the evaluation criteria, which are described as:



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“artistic qualities, the creative and financial collaboration between the Danish and international producer, including previous collaborations and future plans, the Danish share of the creative and technical collaboration, the distribution potential”(DFI, n.d.h).

Film Commissioner Scheme (majority co-productions)

A third area of funding focuses on Danish films (majority co-productions). Through this stream the DFI supports the production of 20–25 feature films and 25–30 documentaries (including for children and youth) and short films each year. The Film Commissioner Scheme supports films at the scriptwriting, development and production stages, that are artistically innovative and challenging but also potentially appealing to audiences (DFI, n.d.b). Importantly, the commissioners do more than just providing funding. The DFI sees their role as that of “a sparring partner, questioning the projects and pointing out weaknesses and problems” (DFI, n.d.b). In comparison with the market scheme (see below), this was described as “a more artistic quality scheme” (Int. Dk4).

Market Scheme (Danish features)

The Market Scheme funds features and focuses on films that are likely to appeal to broad audiences (DFI, n.d.h). In this case, films “should be able to make a certain number of admissions, which is 150,000 admissions in Denmark. Artistic quality is not necessarily the most important criteria for that scheme” (Int. Dk4). It awards funds for development (including scriptwriting) and production. The criteria used to assess applications focus on “quality and audience potential, including narrative, production value, market position, distribution, marketing and the film's overall economic viability. To qualify, films are expected to perform better at the box office than an average Danish feature or perform well with a specific target group, e.g., children and youth” (DFI, n.d.e). A DFI professional further elaborated on this, explaining that the market scheme prioritises films with audience appeal rather than artistic quality. They stated: “So you might say that the market scheme is targeted towards the more audience-friendly films. So basically, what would be the criteria for getting the support, or what the main criteria would be, so that it should be able to make a certain number of admissions, which is 150,000 admissions in Denmark. Then, let's say artistic quality is not necessarily the most important criteria for that scheme” (Int. Dk4).

New Danish Screen

The New Danish Screen (DFI, n.d.j) scheme focuses on the first feature film of professional filmmakers and aims at “enabling manifested talents to grow and test out their ideas” by supporting



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“the development and production of low-budget fiction, documentaries, hybrids, series and cross-media projects” ([DFI, n.d.j](#)).

Public Service Fund

The Public Service Fund focuses on Danish TV dramas and TV documentaries and aims to “provide commercial broadcasters with the opportunity to produce public service content of high quality and risk-taking” ([DFI n.d.k](#)).

The broader relevance of these individual schemes as a constellation that supports the Danish film industry was recognised by interviewees. “Danish films in general have had pretty good admissions in Denmark and Danish admissions and they have done quite well internationally as well. And those two goals, I mean for the Danish box office and its international festival reception, I mean those are two criteria that we do have in our film agreement [...]. Certainly one of the strengths has been to make [...] films that can both attract an audience in cinemas and work for, let's say, both festivals and sometimes [...] sell quite well [...]. A film like Thomas Vinterberg's *Another Round*, for example, is a perfect example of that” (Int. Dk4).

Launch of Danish Feature Films

The DFI supports the launch of around 20 Danish feature films per year in Denmark against the cinema window and other distribution windows ([DFI, n.d.f](#)). All producers of Danish films can apply, although the strategy for launch and distribution is expected “to make full use of the individual film's commercial and/or cultural potential in the individual windows and across the board” Launch support is granted each year for about 20 films of feature length. Examples of films that have gained such support include *Underworld II*, *The Great Silence* and *Idioten*. Applications are assessed based on the following criteria: “quality and cohesiveness in the film's launch and distribution; quality of the film; potential and position in the film market; ability to cultural promotion” ([DFI, n.d.f](#)).

International Promotion

As mentioned previously, the DFI has an international department. As its website states, the goal of this department is to “promote Danish films and to strengthen partnerships between Danish and international producers”. To do so, the DFI “works with producers and sales agents to create the greatest possible visibility for the films at festivals, markets and other film events” ([DFI, n.d.d](#)). As an interviewee stated, “we try to focus the energy and the resources on the smaller number of



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films that we believe have a chance to make it into one of the big festivals” (Int. Dk4). However, the funding distribution remains production-centered: “our film promotion is [...] sort of film-centered. We will spend the most of our funding on the film production and for the Danish audience and so on. So it's far less money that is spent on the international promotion” (Int. Dk4).

In practice, the DFI's International promotion scheme aims to “raise awareness and promote the sale of Danish documentaries, feature films and other image-borne formats abroad” (DFI. n.d.e). Producers (and, in some cases, other stakeholders such as sales agents, Danish minor co-producers, Danish embassies, or international festivals) can apply for support in connection with participation in one of the DFI's priority festivals. As the same interviewee stated, “our rules [...] are set up so that we can lift or we can help with the promotion. That's basically hands-on work, people dedicated to contacting film festivals, being in dialogue with them... The money would be allocated to whenever a film has been selected for one of the big festivals” (Int. Dk4).

Implicit within this scheme is a preparatory first step. “In the first step, you might say it's a combined strategy. It's a collaboration between the festival consultant, the sales agent, the producer, deciding who's doing what [...]. It's about achieving the best potential festival launch as possible. When that is in place, then the producer can apply us for support for the launch” (Int. Dk4). Then, films that are selected receive the following support from the DFI:

- “Searching for opportunities for international festival premiere according to the festival strategy agreed with the film's producer and sales agent.
- Managing synchroops (secured/water-marked links via Cinesend) for festivals.
- Signing up for films for festivals after international premiere.
- When selecting for festival distribution, the festival consultant prepares a festival strategy in collaboration with the film's producer and sales agent. The strategy is done as far as possible, taking into account the interests of the director, manufacturer and sales agent. Once a title is sold to a country, the Film Institute refers festival invitations to the distributor in question who decides on the invitation” (DFI. n.d.e).

This includes publicist costs, campaigning, and advertising costs. Indeed, the DFI does not do its own advertising (Int. Dk4). Films that have received this support include *The Girl with the Needle*, a Danish majority film, and *The Apprentice*, a Danish minor co-production by Ali Abbasi with several other Danes in the team. This approach requires a close collaboration between the DFI, producers, and international sales agents, which is built on trust.



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Other funding schemes

Additionally, the DFI has several other funding schemes. This includes: regional funding for films produced outside of the Greater Copenhagen area; funding for workshops aimed at strengthening the development of talent in independent or municipal institutions and associations; cinema funding to modernise Danish cinemas, support operating Danish arthouse cinemas and also special initiatives; funding for the dissemination of films to children and youth through publications, projects and activities for this target group; funding for general purposes regarding the promotion of film art, film culture and cinema culture (such as continuing education abroad and in Denmark, publications, associations and initiatives); finally, funding supporting the promotion of Danish films at international festivals and screenings (of which the goal is that 25% of the funds are to be awarded for festival activities for children and young people) through “activities that raise awareness and sales of Danish films internationally, including shared stands, joint Nordic promotion, special campaigns and other efforts” ([DFI, n.d.c](#)). It should also be mentioned that the DFI shares a stand with other Nordic film institutes at film festivals in Berlin, Cannes, and Toronto.

Importantly, promotional efforts apply both to major and minor co-productions. “For example, *The Apprentice* is a Danish minor co-production, so that’s supported through our larger co-production scheme. Apart from him, the cinematographer and editor are Danish, so in fact, there are many Danish elements in that. We will definitely try and support the film” (Int. Dk4). This being said, the DFI tries “to focus the energy and the resources on the number of films, the smaller number of films that actually we believe have a chance to make it into one of the big festivals” (Int. Dk4). Such efforts focus primarily on the following festivals: Berlin, Cannes, Sundance, Venice, IDFA Amsterdam, the Oscars, and the European Film Awards. Specifically, this is “a collaboration between the festival consultant, the sales agent, the producer, of course making a strategy [...]. It’s a combined effort and it’s about basically achieving the best potential festival launch as possible [...]. Then the producer can apply us for support for the launch” (Int. Dk4). Although interviewees recognised the value of this funding, it was considered insufficient for the promotion of films outside of the EU, or to support the promotion of arthouse films (Int. Dk8).

Besides these schemes the DFI’s recent work with Publikum, an agency that helps filmmakers and professionals better connect to potential audiences, namely by discussing parts of scripts with focus groups, was also mentioned in interviews as broadly connected to the issue of promotion. Interviewees mentioned the possibility of a similar scheme at the European level (Int. Dk4).



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More broadly, although interviewees supported the work of the DFI and its values, they thought that the system is biased towards those with less experimental approaches to filmmaking or with more atypical profiles. “It is a system that might be hard for people who are not quite in it, who want to do something different to get in there. It can be a bit tricky (Int. Dk6). This critique echoes earlier research, which uncovered “a particular form of auteur ideology and practice form in the Danish film industry” (Mathieu, 2011, p. 3). In the long-term, this might hinder cultural diversity. Another interviewee stressed the need for programmes to help producers deal with the increasing legal and financial complexity associated with supporting co-productions. “They have lawyers in the house, but [...] they take care of formulating the contracts of the Danish Film Institute and the guidelines [...]. Nobody is going into helping the producers and looking into the ultra-complex financing that it is at hand. [...] The level of time they're having to spend on this is [...] distracting them from their work as a creative producer. Which I think also then gets reflected in the fact that [...] you no longer have these super strong Danish films out and about” (Int. Dk5). This echoes previous research on the pressures that are added to producers by “local and global forces” (Meir, 2016, p. 39). A similar comment was made regarding European Film Promotion and the European Film Academy – i.e. regarding the need for such programmes to equip producers with practical knowledge necessary to build and manage complex co-productions.

Moreover, despite recognising the importance of the financial commitment by broadcasters in the case of co-productions, film professionals suggested that the rights given should be proportional to the investment (Int. Dk1). On this topic, interviewees recognised the important role of the DFI in ensuring fairer contracts with DR. ‘When TV producers negotiate with DR, DR is the strong party in that negotiation [...]. We oftentimes see DFI understanding this and trying to help the production company and saying that term is simply unreasonable. “Remove it. We are not going to support this if DR has this horrible term like exclusivity.” It's important that the DFI in all countries are very aware that they have a role as the adult that can actually go and say, you know, broadcaster, you're not being reasonable’ (Int. Dk2).

Filmcentralen

Additionally, the DFI supports Filmcentralen, the Danish Film learning platform and streaming site. This platform includes more than 2000 films, shorts, documentaries, series and feature films, and learning resources for students and teachers in primary, secondary schools and high school. This scheme has economic benefits for film producers and, therefore, contributes to the cultural vitality of the Danish film ecosystem. ‘In other countries the legislators just thought, “Oh, that's so small,



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it's going to be complicated for the school, we just make [educational use] free use in the copyright, like fair use" [...]. In Denmark we went the other way, which is also okay within EU law. We said, "We're going to make a really good product and we're going to earn money on this [...]." The distributors are sending title by title what they want, and the state made up a streaming service [...]. The producers and production companies in the end earned a lot more on that than they do on the cultural, private copying, funding money. And that's a Danish invention' (Int. Dk3).

School Cinema

Finally, the DFI supports an initiative called School Cinema, alongside "municipal education departments, schools and regional centres for education. The market players in this constellation are Danish distributors and exhibitors which provide rights to the films and secure the screening venues. According to the School Cinema's concept, students see films in cinemas and discuss their themes, dramaturgy and visual language afterwards in class within multiple school subjects" (Mitric, 2022). This scheme is developed as part of the DFI's responsibility to focus on children film provision. According to Mitric, between 2001 and 2021, "315 titles have been distributed throughout Denmark as part of the School Cinema programme [...]. Danish children of all ages (from kindergarten to high school) could see 133 non-Danish European arthouse films from 18 different countries and in 17 languages [...]. The programme annually attracts an average of 270 000 participants (a third of the total number of pupils in Denmark)". This scheme can be understood as a long-term arthouse cinema promotion and audience-building effort, which strengthens the Danish film ecosystem – a point identified by interviewees as an important explanation of the international success of Danish films.

Other schemes and entities

The DFI supports the international promotion of Danish films through the website **Watch Danish Films** which lists 300 films and where they can be seen (both in cinemas and streaming platforms) in all genres with the aim to give "the Danish representations, embassies and cultural institutes, as well as international fans of Danish cinema an easy and always updated tool to find ways to see Danish content" (DFI n.d.m). The website also includes information on local distributors. This programme replaces a previous programme: the DFI's **Embassy Film Package** (DFI n.d.l) which provided Danish Embassies and Consulates with a selection of Danish films for both children and adults between 2010 and 2020. However, the films that circulate in this circuit tend to be those that



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did not get into major international festivals. The relevance of this circuit to build a strong market outside of Europe could be seen as counterproductive (Int. Dk4).

Finally, the **Danish Film School** or the National Film School of Denmark (Den Danske Filmskole) is an independent institution under the Danish Ministry of Culture. It offers 4-year degrees of higher education for film directors, scriptwriters, producers, cinematographers, film editors, sound designers, and game developers. In doing so, it supports the supply chain and the development of specialised workers, which contributes to the international success of Danish films. The school aims to teach students the craft of filmmaking to support their career in the professional film and media industry, but also to support each student's artistic voice. Interviewees highlighted that the school nurtures meaningful connections among students, fostering future collaborations and a strong sense of cooperation. Alongside these degrees, the school also offers continuous training through "courses, masterclasses, workshops, and other industry events that expand and improve the skills of those [...] who already work in the film, TV and games industry" ([Danske Filmskole n.d.](#)) It also supports R&D work through a set of projects of artistic research, and hosts cultural events (film screenings, artist meetings and debates). Educational activities for students and film professionals are strengthened through support schemes, fostering both knowledge-sharing and artistic exchange. A professional working at the DFI confirmed this, stating: "We can support some of the activities, educational activities that would take place [...] at the film school, not necessarily for the ones that are attending the film school, but they will have a lot of courses and training sessions, as well for people that have either finished film school or just working in the film business" (Int. Dk4). This being said, an interview suggested that the Danish Film School, while helpful for beginners, does not provide enough support for film development and artistic experimentation (Int. Dk8), nourishing film professionals that end up prioritising commercial work (Int. Dk5).

Although the DFI supports different types of film and at different moments in the value chain, and interviews were mostly supportive of its work, one point of criticism regarded the main underlying goal of the Institute, perceived as being primarily "to make and promote original Danish films. They're not there to build an industry" (Int. Dk7). This is not, however, something for which the DFI's staff is criticised but, rather, the consequence of lack of political support for a different model (Int. Dk7).



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KulturPlus

Although KulturPlus is a small scheme, it should nonetheless be mentioned because its goal is “to promote film and TV as cultural media, both nationally and internationally” ([Producent Rettigheder Danmark. n.d.c](#)). The scheme funds initiatives relevant to the industry which “can promote film and TV as cultural media, both in Denmark and abroad. Danish film and TV are the focus of support” ([Producent Rettigheder Danmark. n.d.c](#)). Suitable applications (by anyone in the Danish TV and film industry, regardless of nationality and membership) include knowledge sharing activities in festivals, conferences, seminars, master classes, publications, project support and participation in international TV and film events, as well as study grants for individuals interested in educational stays abroad (targeting producers and executive producers), or support for institutions to develop and complete relevant educational programmes. The fund is distributed by Producer Rights Denmark based on revenue from Copydan KulturPlus, which provides compensation for the copying of content for private use. “Under Danish law, two-thirds of the revenue is distributed individually to Danish and foreign producers that have supplied productions to Danish TV stations, and the remaining third is distributed collectively” ([Producent Rettigheder Danmark. n.d.c](#)). As an interviewee stated, this scheme also contributes to skills development and, through this, to strengthening the Danish film industry. It distributes circa “2 million Danish kroner. It's very small [...] but it's of course important. We dig into every secondary market we can find because we have a strong copyright. And I think that for feature films, of course, sometimes we support a young director who goes abroad to New York's art school [...], we support women in film, we support maybe making better music composition...” (Int. Dk3).

2.7.4 Sub-state level funds

Denmark is a state composed of several regions and this is reflected in the existence of regional film funds, whose important role is recognised by Danish film policy. For example, the previous Film Agreement stated “the regional film funds – FilmFyn and the West Danish Film Fund – will be strengthened with a total of DKK 35 m (EUR 4.7 m) yearly, so that each film fund will receive DKK 23.7 m (EUR 3.2 m) in annual state subsidies. The agreement also makes it possible for new regional film funds to receive state subsidies as well” ([DFI, 2018b](#)).

The West Danish Film Fund was established in 2002 and represents 10 municipalities in the Western Denmark region. It dedicates around €4,000,000 annually to film and media productions. Its aim is to support “co-productions that have Danish artistic or technical participation with a



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connection to the region. Support is given to artistically interesting productions which strengthen the film industry in the region. Financial support is provided in the form of subsidies and/or investment” ([Den Vestdanske Filmpulje, n.d.](#)).

Similarly, FilmFyn is a regional film fund that “supports and invests in feature films, TV fiction and short and documentary films with the aim of creating growth, development and experiences that contribute to the film culture in Funen and in Denmark” ([FilmFyn, n.d.](#)). Founded in 2003 as a partly private, partly publicly-owned limited company, the foundation supports minor 3 to 5 co-productions annually, with the aim of promoting the development of regional production companies from all over Denmark through cooperation with foreign producers. The fund is led by nine Funen municipalities (Assens, Faaborg-Midtfyn, Kerteminde, Langeland, Nordfyns, Nyborg, Odense, Svendborg and Ærø) as well as TV 2 DANMARK and Fynsk Erhverv. Its primary funding results from an annual operating subsidy from the owner municipalities combined with an annual state cultural grant, which is established in the film agreement, and is paid by the DFI.

Both schemes were mentioned by our interviewees (e.g. Int. Dk6), as was a Copenhagen-based film fund that no longer exists. Although these funds were recognised as helpful, interviewees highlighted that the lack of a common application procedure and timelines adds extra bureaucratic and administrative complications. ‘When you do co-productions [...] it takes ages to get around. We [...] have to do maybe six, seven, eight different final accounts for one film, because everyone is sitting there “no, you have to do it in our way’ (Int. Dk2).

2.8 Sweden

2.8.1 Objectives

From a policy perspective, the actors involved in the international promotion of film in Sweden aim to support the whole value chain of the film industry with multiple goals. However, in comparison with the other Nordic country analysed in this report, Denmark, there is a focus on economic and social aims. This is particularly notable considering the fact that, “since the 1990s, public service broadcasting has adopted neo-liberal corporate governance structures. These structures have made previous ideals of collective identity and education less salient and the individual more prominent with respect to consumption” (Jakobsson et al., 2021, p. 383). It could be said, then, that such film policies aim to establish an equilibrium within a consumption-led understanding of



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public service broadcasting that shifted “governance [...] from market interventions to market support” (Jansson & Van Belle, 2024, p. 282).

This trend continues a change started in 1987, when the monopoly of public service television (which had been established in 1957) was challenged by the introduction of TV3, a commercial channel. Today, streamers include the public platform SVT Play, which “has the highest appeal among national public broadcasters in Scandinavia, with a 76% usage rate” ([Deloitte, n.d.](#)). In Sweden, as elsewhere, “international commercial streaming services such as Netflix, Max (HBO), and Disney+ show a steady decline in usage with age, as observed in previous surveys. Netflix leads among younger audiences, with 71% usage in the 18–24 age group, but this drops sharply to just 26% in the 65–75 age group” ([Deloitte, n.d.](#)). Contrary to what is evident in other case studies, Swedish film policy does not aim to change the market or audience preferences. Moreover, as has been noted elsewhere “Denmark and Sweden have neither a purpose nor goals that in any way refer to the sector’s players or economy” ([Film i Väst, 2025](#), p. 9).

Although there are film funding streams dedicated to experimental or arthouse film, most of the funding is dedicated to films that are considered to be likely to achieve success in the market. Moreover, unlike other contexts, scholars have noted a particularly clear-cut distinction in terms of policies and expectations between so-called art house and broader audience films, noting that Swedish policy “contributes to [...] reproducing a deep-seated distinction between ‘wide’ and ‘narrow’ films” (Frykholm, 2023). Despite this, the decision to focus on supporting non-arthouse films has not resulted in a growing domestic market for Swedish films.

As a film market, in 2023 Sweden saw the release of 75 Swedish feature-length releases, of which 59 had a theatrical release. That is, there is a high number of Swedish film releases, but despite this, the market share of Swedish films therein was not highly significant, only 17% (a significant decrease from 27% in 2020). Instead, Swedish films are more often to be seen on TV and SVoD. Additionally, film viewing continues to decrease, especially among older segments of the population. This leads to a recognition of mismatch between supply and demand and what is funded by the Swedish Film Institute in that, “looking at different genres, young people are more interested in adventure, action, horror, sci-fi and fantasy at the cinema in relation to the entire population. Older moviegoers are more interested in drama, thriller, romance and documentaries. The range of new theatrical films in 2023 was greatest in drama and documentary. However, there



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were few films in the genres action, sci-fi, fantasy and thriller considering the demand for these” ([Film Institute, 2023, p. 19](#)).

Finally, it should be noted that gender equality (understood in this context as a key social objective) is a central and transversal goal of Swedish film policy, as has been examined thoroughly in the literature. In 2013, the Swedish Film Institute launched a program for gender equality; three years later, it was transformed into the action plan 50/50 by 2020, positioning Sweden “as a model country” ([Ryberg, 2020](#)). In practice, this means that funding schemes supported by the Swedish Film Institute explicitly require that “the sum of all support should go to stories with different perspectives and expressions and a variety of voices, both in front of and behind the camera. The support should be distributed 50/50 between the genders over time. Support recipients who do not identify as a gender should not be included in the calculation” ([Svenska Filminstitutet, n.d.n.](#)).

Indeed, the Swedish Film Institute has been described as seeking “to assume a leadership role in developing diversity tools” (McElroy and Noonan, 383). However, the scholarship is critical of the results achieved. “Swedish [...] gender equality policies, despite having increased the presence of women film workers, still fail to render visible the structural basis of inequalities cemented by androcentric film governance structures and a male norm around which the film industry has been built (Calderón-Sandoval et al., 2024). Other authors have reiterated this point: “the Swedish film industry rests on a gendered division of labour, that the professions of director and producer are constructed in relation to masculinity, and that the gender equality measures undertaken are not sufficient to come to grips with the gender inequalities in the industry” (Jansson et al., 2021, p. 2010).

A report by the SFI confirms this analysis. Among many other facts, it demonstrates that, despite substantial improvements and the SFI’s own active policies, most filmmakers continue to be men and women directors have considerably lower budgets. Moreover, projects led by women continue to be seen as riskier ([Svenska Filminstitutet, 2021b](#)).



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2.8.2 Actors

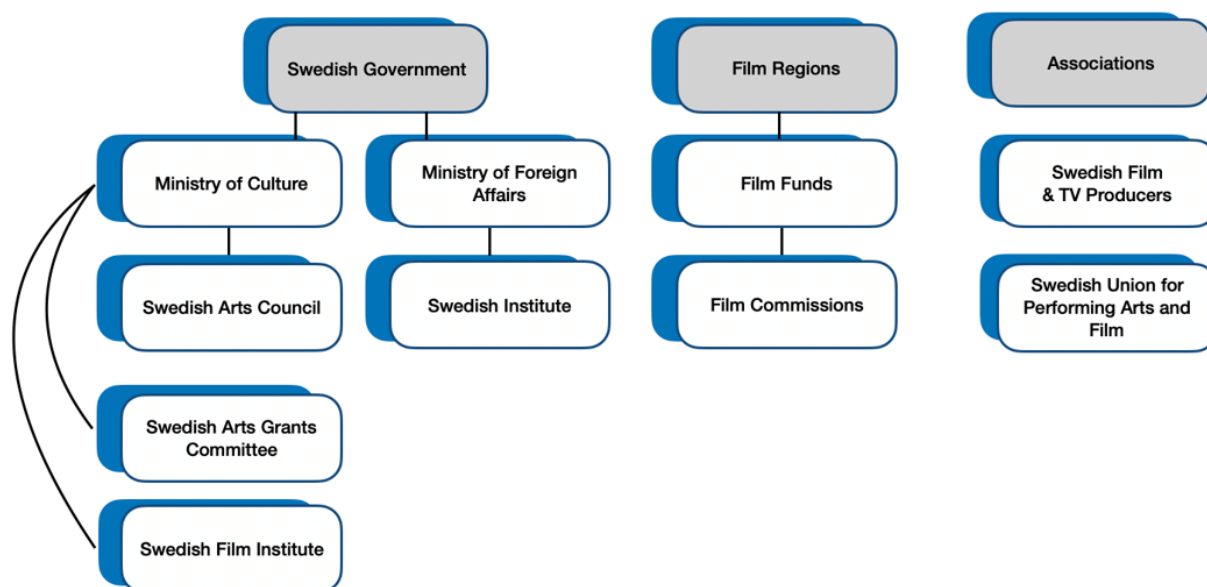


Figure 29 - Swedish Film Industry: International Promotion Actors Map

Before detailing the actors involved in the promotion of Swedish film, it is important to stress that, as others have written, “apart from the parliament and government, who issue laws and regulations, the Broadcasting Authority is the government agency tasked with auditing broadcasters and issuing licences for terrestrial broadcasting. Importantly, the monitoring of streaming platforms in the EU is done in and by the country where the platform company is seated. Hence, regulators such as the Broadcasting Authority need to go through the corresponding regulators in other countries if they have complaints. A separate part of the Broadcasting Authority is the Swedish Broadcasting Commission which, based on complaints made by individuals, inspect content and may issue verdicts on non-compliance” (Jansson & Van Belle, 2024, p. 282).

State Ministries

Ministry of Culture

The Swedish Ministry of Culture is responsible for issues and initiatives on the topics of “culture, media, democracy, human rights, minorities, national minorities including Sami culture and



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language. The ministry also oversees anti-discrimination policy and issues regarding civil society and faith communities, as well as sport and youth” ([KulturRadet, n.d.](#)). The ministry’s policy objectives that frame Swedish cultural policy today were established in 2009. They were defined as follows: “Culture is to be a dynamic, challenging and independent force based on the freedom of expression. Everyone is to have the opportunity to participate in cultural life. Creativity, diversity and artistic quality are to be integral parts of society’s development” ([KulturRadet, n.d.](#)). This is translated into five priorities: “Opportunities for everyone to experience culture, education and develop their creative abilities; Quality and artistic renewal; A dynamic cultural heritage that is preserved, used and developed; International and intercultural exchange and cooperation in the cultural sphere; Equal access to arts and culture for children and youth” ([KulturRadet, n.d.](#)).

The Swedish Arts Council

The Swedish Arts Council is a government agency founded in 1974. It supports arts and culture, covering areas such as literature, museums, libraries, performing arts, music, reading promotion, arts, culture in schools, and crafts. Its annual budget is circa SEK 2,500,000,000 for arts and culture, most of which is distributed to the Swedish regions. The Council is also responsible for supporting the development of arts and culture both in Sweden and abroad and, therefore, for its promotion via “international collaboration and exchanges in performing arts, music, visual arts, design and literature by awarding project grants and yearly working grants to Swedish based organisations” ([KulturRadet, n.d.](#)). Specifically, the website of the Ministry states that the “Swedish Arts Council promotes international and intercultural exchange and collaboration across the entire culture field. The agency also promotes the role of culture in strengthening freedom of expression and democratisation internationally” ([KulturRadet, n.d.](#)). Additionally, the Council promotes the internationalisation of Swedish performing arts, by coordinating the presence of Swedish artists in international arts fairs. It does so in collaboration with the other Nordic countries. Swedish cultural policy is guided by the following main objectives, which are identified in the policy *Tid för kultur* ('Time for Culture'), from 2009: “Independence. Culture should be a dynamic, challenging and independent force rooted in freedom of expression. Participation. Everyone should have the opportunity to engage in cultural activities. Societal advancement. The advancement of society should be characterised by creativity, diversity and artistic quality.”

Importantly, the idea of providing fair economic and social conditions for cultural workers is understood as essential to safeguard artistic freedom. Other horizontal objectives important to the Swedish government (that is, shared by the government beyond cultural policy) are gender



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equality and the integration of a diversity perspective; they are reflected in the second objective (participation). Finally, Swedish cultural policy is guided by the aim to support the development of society, a goal that refers to the broader impact of cultural policy in society. This is reflected in cross-sectoral initiatives to promote art and culture beyond the cultural sector itself. Importantly, Swedish cultural policy identifies as a core principle the recognition of the intrinsic value of culture, even though it is also acknowledged that the cultural sector can contribute to achieving broader social aims.

Moreover, in 2021, the communication 'Policy for Artists' Conditions' ('Politik för konstnärers villkor') outlined measures to improve artists' working conditions ([Regeringen, 2020](#)). This was followed by a 10-year strategy presented by the government in 2024 to “enhance the conditions for cultural and creative professionals and entrepreneurs within the cultural and creative sectors” considering, namely, “technology and industry development and the needs in this area” ([Regeringen, 2024](#)). The strategy identifies the following areas as priorities: national statistics, knowledge of copyright, advice, support, financing and regulatory costs, skills supply and security systems, habitats and business across the country, the impact internationally for the cultural and creative companies. The document makes some references to film when defining the cultural and creative industries ([Regeringen, 2024, p.4](#)), when identifying the areas in which Sweden has been most successful (“Swedish companies have also been behind groundbreaking developments in industries such as film and computer games. Despite the fact that Sweden is a small country, we have world-leading companies and practitioners in the cultural and creative industries” [Regeringen, 2024, p.6](#)), when referring to the importance of copyright (“Public actors should work strategically to facilitate a well-functioning copyright-based market. Effective copyright protection is an important prerequisite for cultural and creative companies to continue to be part of a cutting-edge knowledge economy [...]. It also provides opportunities for other types of companies, such as book and music publishers, media companies, and audio, film and television production companies, as well as streaming services and other distribution platforms, to invest in rights and finance the creative work of others”, [Regeringen, 2024, p.11](#)), in reference to the importance of small and medium enterprises in the sector (“...these industries include many solo and micro-enterprises [...]. The strategies and business models of cultural and creative enterprises are often characterised by using and combining existing assets in new, creative ways in collaborations, which creates innovation and development [...]. Specialised knowledge is temporarily combined in adapted constellations to, for example, develop a new service, solve a societal challenge or



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produce a film, [Regeringen, 2024, p.11](#)), and when reiterating the need for continuous professional development (“...representatives of the film and television industry have worked in dialogue with the state research institute RISE on what is known as “micro-merits”, a collective term in the EU for competences that consist of smaller parts than a full degree, and which can be either formal or developed through work or other experiences, [Regeringen, 2024, p.17](#)).

Swedish Arts Grants Committee

Another government agency, the Swedish Arts Grants Committee (Konstnärsnämnden), provides scholarships and grants to individual artists and for international collaborations and projects, coordinates international cultural exchanges, coordinates international programmes and residencies for professionals, particularly in the film sector, and compiles data and insights on the economic and social conditions of artists ([Konstnärsnämnden, n.d.](#)). It is the main agency responsible for implementing Swedish policy on artists and it operates according to the arm's length principle.

Ministry of Foreign Affairs

The Swedish Ministry for Foreign Affairs is the ministry responsible for the country's foreign, development cooperation, and trade policy. The **Swedish Institute (SI)** is a public agency operating under the authority of the Ministry of Foreign Affairs.

Public Agencies

Swedish Film Institute

The main public agency supporting film in Sweden is the Svenska Filminstitutet (Swedish Film Institute – SFI). It is responsible for national film policies in Sweden. Founded in 1963, it supports film production, distribution, international promotion, screening and preservation. Its remit results from a combination of the Film Bill and the annual budget (grant appropriations) from the Swedish Ministry of Culture. Specifically, its mission is “to promote film across the board – from idea to finished product, during launch in Sweden and around the world, and by preserving films for posterity in our archives” ([Svenska Filminstitutet, n.d.z.](#)). The SFI serves several goals, namely: to preserve and make available Sweden's film heritage, work to educate children and young people in film and moving images, support the production, distribution and screening of valuable film, and represent the Swedish film internationally.



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The Film Reform, an agreement between the Swedish state and the film industry, established a funding stream for the Film Institute. This agreement “exempted cinemas from the entertainment tax that existed at the time in return for a 10% levy on cinema admission tickets. This was to be paid to the Film Institute, which in turn would plough back that money in the form of funding. Part of the Institute's resources would also be used for archive purposes, documentation, and film restoration” ([Svenska Filminstitutet, n.d.f.](#)). Since then, state funding was also added to the SFI's budget considering “the importance of domestic film production, and the decline in cinema admissions in Sweden” ([Svenska Filminstitutet, n.d.f.](#)).

More broadly, Swedish film policy was financed between 1963 and 2016 according to the Film Agreement, which was renegotiated regularly. A change in 1973 led to the establishment of direct grants by the Swedish state. Later, in 1982 the video industry joined the agreement (though it later left in 1998). More recently, the state was established as the sole funder of the SFI ([Svenska Filminstitutet, n.d.f.](#)). Moreover, the remit of the SFI has also shifted since its creation. Until 1993, it also acted as the producer of films. In 1970, the Film School became part of an independent body (Dramatiska Institutet). Finally, the allocation of financial support has also changed. Initially, funding was distributed retroactively to producers. From the 1970s, it was awarded by committees. Since 1993, film commissioners have the responsibility to distribute funding – although the decision must be formally validated by the SFI's CEO ([Svenska Filminstitutet, n.d.f.](#)).

Swedish Institute

The Swedish Institute (SI) “builds interest and trust in Sweden around the world. We work with Sweden promotion, cooperation in the Baltic Sea region and global development” ([Swedish Institute, n.d.](#)). Specifically, the institute facilitates international cooperation and partnerships with the understanding that “if the world around us has a high level of trust in Sweden, it improves the conditions for trade, investment, tourism and cultural exchange. It also makes it easier to attract international talent and contribute to global sustainable development” ([Swedish Institute, n.d.](#)). In doing so, it supports efforts by the Swedish government to “reach various international goals concerning foreign policy, education, international aid and development. The SI's activities span over fields such as culture, society, research, higher education, business, innovation, democracy and global development” ([Government Offices of Sweden, n.d.](#)). The SI is mostly financed directly by the Swedish state budget (approximately SEK 294,000,000, of which circa two thirds is financed by the Swedish aid budget) supporting work across four areas: international cooperation, international assistance, education and university research and business. The Current Advisory



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Council (in power from July 1, 2023 to July 1, 2026) has members with political, diplomatic, cultural and geopolitical backgrounds. Although film is not a central area of focus of the Institute, it makes available a number of Swedish films, feature length, documentary and short, for non-profit cultural screenings ([Swedish Institute, n.d.](#)). Moreover, interviewees stated that the Institute occasionally engages Swedish individuals or organisations to support the promotion of Swedish films. “I was in Los Angeles because Ruben Östlund's movie was nominated for an Oscar. I was there and I was asked by the Swedish Institute, to put together a meeting for the Swedish Ambassador to Washington” (Int. Sw14).

Sub-state agencies

Film Regions

At the sub-state level, the responsibility for film policy in Sweden lies with 19 Film Regions (whose association is called The Film Region Association or Filmregionerna), with which the SFI collaborates: Film i Dalarna; Film på Gotland; Region Gävleborg; Region Halland; Film i Jönköpings län (Jönköping County); Film i Skåne; Film Stockholm; Film i Sörmland; Landstinget i Uppsala län (Uppsala County Council); Region Värmland; Film i Västerbotten; Landstinget Västmanland (Västmanland County Council); Film i Västernorrland; Film i Örebro län (Örebro County); Filmpool Jämtland; Film i Öst; Filmpool Nord; Region Västra Götaland; Reaktor Sydost. Some of these film regions finance television series (such as Film Stockholm, Film i Skåne and Film på Gotland) – which the SFI doesn't (Int. Sw17).

These regions are active in “film pedagogy, screening and dissemination as well as talent development and professional filmmaking. The regional film entities support both municipal activities and organisations within civil society, including individual filmmakers, cinemas, and other screening organisers” ([Svenska Filminstitutet, n.d.p.](#)). Specifically, they support film education, screening and distribution, talent development and professional filmmaking.

All such film entities (with the exception of Stockholm Region) are co-financed through the Swedish Arts Council and regional funding. This framework mandates that the Regions develop regional cultural plans with local actors. It should be noted that these regions are funded through a combination of public and private sources. Moreover, they work in a collaborative logic with the SFI, private studios and other regions. As a film commissioner from one of these regions stated, “most of the features here are very dependent on the Swedish film Institute together with the



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regional film funds [...]. We don't care if there's another regional film fund. It's actually a lot of time better because it strengthens the production" (Int. Sw17).

Associations and NGOs

Swedish Film & TV Producers

The Swedish Film & TV Producers is a trade association. It represents more than 100 independent production companies working in the production of film and results from the merger of three associations in 2009: the Swedish Film Producers Association, the Swedish TV Producers Association, and the Swedish Association of Commercial Film Producers. Among its goals, the association promotes the interests of its members and their work by influencing public authorities and institutions, broadcasters and copyright organisations ([FilmTVP, n.d.](#)). Namely, the association often collaborates with the Swedish Film Institute and with other Swedish and Nordic associations to showcase Swedish and Nordic films.

Swedish Union for Performing Arts and Film

The Swedish Union for Performing Arts and Film is a trade union and professional association of a wide range of cultural workers, namely professionals in the Swedish film sector. As its website states, "the main function of Scen & Film is to negotiate collective agreements, which among other things, include guaranteed minimum wages, terms of employment, insurances, pensions and copyright remuneration" ([Scen & Film, n.d.](#)). Although promotion is not one of their direct areas of responsibility, by defending the rights of its workers the union indirectly promotes the Swedish film industry within a competitive streamer landscape. Following an agreement on success-based remuneration for Swedish Netflix Original Series signed in 2020, the union signed an extended partnership with Netflix in 2022. This establishes, alongside a guaranteed initial rights payment, success-based remuneration for qualifying films. As Netflix explains, "when a certain threshold of viewers globally have completed a film or a series, an amount specified in the collective frame agreement is paid. There is no limit to the number of times the threshold can be reached, and each qualifies for an additional success based payment. The collective frame agreement further ensures that a pro rata payment is provided even when the number of completers do not reach this threshold [...]. Previously released Swedish feature films are also included in the success metric retrospectively to ensure creatives of past productions benefit from the deal" ([Netflix, 2022](#)).



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2.8.3 Programmes and cooperative arrangements

Funded exclusively by the Swedish State

The SFI supports the Swedish film ecosystem with a wide range of funding schemes – of which only the most relevant for the topic at hand are mentioned below. Although the SFI also supports creative experimentation, its schemes reveal a broad focus on audience preferences and distribution – and, therefore, on the aim of achieving box office success. Moreover, it should also be noted that “most Swedish films are major co-productions” (Int. Sw9), reflecting the collaborative approach to filmmaking that is common in the Nordics.

Production, Development and Distribution

When supporting feature films ([Svenska Filminstitutet, n.d.k.](#)), the SFI is mandated “to prioritise projects that are relevant to the development of Swedish film culture and the film industry. We need to ensure that Swedish creators, actors and film workers will be able to work in Sweden in the future, and that the audience has access to feature films in a Swedish context and/or in the Swedish language and the national minority languages Finnish, Yiddish, Meänkieli, Romani Chib and Sami” ([Svenska Filminstitutet, n.d.c.](#)).¹⁹ This form of support is divided into different strands. Mainly, it consists of support for film project development, and for the production of feature films, which aims “to produce a broad repertoire of Swedish films in all genres with high quality, attractiveness and relevance for the audience through Swedish film production” ([Svenska Filminstitutet, n.d.c.](#)). In this case, the selection criteria are: “originality of the film, craftsmanship and urgency, the project's ability to reach an audience throughout the country, constellation of director/screenplayer, conditions for implementation, whether the film contributes to a wide repertoire, the opportunity to reach out internationally” ([Svenska Filminstitutet, n.d.q.](#)). However, as the overview below reveals, the SFI's schemes reveal a stronger concern with box office success – evident in the focus on audience preferences and distribution – than with cultural originality or experimentation. Moreover, the SFI does not finance “more than 80% of the Swedish spend” (Int. Sw9).

In the case of documentaries ([Svenska Filminstitutet, n.d.d.](#)), support is granted, namely, for their distribution ([Svenska Filminstitutet, n.d.v.](#)). Moreover, the SFI provides support for the production of documentaries with the aim “to produce a broad repertoire of Swedish documentaries with high

¹⁹ The quotes from this section are English translations of the Swedish version of the SFI's website.



quality, attractiveness and relevance to the audience” ([Svenska Filminstitutet, n.d.r.](#)). In both cases, the potential to reach international audiences is among the selection criteria.

Finally, in the case of short films and new formats ([Svenska Filminstitutet, n.d.j.](#)), support is also available for their development, although this is an exceptional case for projects with special needs, such as animation films. The film's “intended audience and potential for festival participation” is among the selection criteria ([Svenska Filminstitutet, n.d.x.](#)). Moreover, the SFI provides support for the production of these films with the aim “to stimulate the renewal of Swedish film and produce a broad repertoire in all genres in the short format, with high quality, attractiveness and relevance to the audience” ([Svenska Filminstitutet, n.d.s.](#)).

Finally, it should be stressed that the SFI has recently shifted from being platform neutral to prioritising “films that have a normal, old-fashioned window so that the whole ecosystem can live from the film” (Int. Sw9). Moreover, it only supports films whose producers keep their rights.

International co-productions

The SFI supports international co-productions “to increase opportunities for international financing of Swedish film and the dissemination of foreign film in Sweden” ([Svenska Filminstitutet, n.d.t.](#)). At the time of application, a Swedish distributor with a strategy for cinema distribution or for national TV/VOD distribution must be in place (with the exception of short films). When the planned co-production is between Sweden and France, Israel, Italy, Canada and Germany, existing bilateral agreements apply. If, however, “co-production is carried out with countries with which Sweden does not have a bilateral agreement [...], the following applies: the total contribution from co-producers in non-documented countries may not exceed 30% of total financing. In addition, at least three co-producers in three signatories to the Convention must be included in co-production” ([Svenska Filminstitutet, n.d.t.](#)). Applications are made on based on the following criteria: “long-term creative and economic cooperation between the Swedish and foreign producer and/or the production company, the proportion of Swedish artistic and technical participation in the production. Artistic participation refers to, for example: script, directing, photography, set designer, clipper, sound design, composer and actor, technical participation refers to, for example: post-processing, key functions team, location, audience potential in Sweden, artistic quality” ([Svenska Filminstitutet, n.d.t.](#)). Moreover, “the editorial board will prioritise projects [...] that can reach a wide audience in Sweden and internationally” ([Svenska Filminstitutet, n.d.t.](#)).



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Distribution on streaming platforms

The SFI also supports distribution and viewing with multiple schemes. The most pertinent in the context of this report – support for the dissemination of important films on streaming platforms – is highlighted here. This scheme aims “to increase the possibility of a wide and varied repertoire of valuable films that can reach audiences throughout the country” ([Svenska Filminstitutet. n.d.u.](#)). Swedish-owned streaming platforms operating in Sweden can apply for financial support focused on marketing and technical development. Applications are made based on criteria that includes cultural diversity and public value, that is, if “the streaming platform’s combined film offering contributes to the audience being reached by film from a diversity of countries and language areas, as well as Swedish film, [...] the public impact of the streaming platform” ([Svenska Filminstitutet. n.d.u.](#)). Moreover, “special priority is given to films for children and young people” ([Svenska Filminstitutet. n.d.u.](#)).

International distribution and promotion

Moreover, the SFI’s international unit facilitates the international distribution and promotion ([Svenska Filminstitutet. n.d.g](#)) of Swedish films in international festivals, markets and other cultural or commercial events ([Svenska Filminstitutet. n.d.i.](#)). To provide flexibility, this work is split into four main dimensions: the SFI’s own promotional activities of films in development or in production and soon to be released, international festival distribution (which also includes strategic advice), international distribution support, and support for the international launch of films (Int. Sw15). The latter applies to films of all lengths and to major and minor co-productions. This being said, in the case of minor co-productions, the SFI only covers travel and accommodation costs; as for major co-productions, such support is accompanied by funding for promotion, publicist costs, and screenings (Int. Sw15). Indeed, most of the “resources for promotion focus on 100% national or majority co-productions” (Int. Sw9). It should also be highlighted that the SFI’s promotion efforts echo Sweden’s values. As a policymaker stated, “we have to weigh in aspects like gender equality, liberal ideas, the general sense of what Sweden stands for as a community” (Int. Sw15).

International festival distribution

With its funding scheme dedicated to international festival distribution, the SFI aims to support the international circulation of Swedish films in festivals, markets and other cultural and commercial events. To do so, the SFI “works closely with producers and sales agents” ([Svenska Filminstitutet. n.d.a.](#)). This applies to short films, features, and documentaries. If support is granted, the SFI



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commits to, among other tasks, “advise on international launch strategy and work to get the film admitted to priority international film festivals” and “deploy the film to international film festivals as well as other relevant film cultural events” ([Svenska Filminstitutet, n.d.a.](#)). The main criteria used to make these decisions are: “craftsmanship, matter, originality and international potential” ([Svenska Filminstitutet, n.d.a.](#)). This system has been recently redesigned to increase flexibility in applications. “You can apply [...] sending two versions of what you want to do with your film [...]. You can just send a suggestion. We’ll say whether we want to support that or not” (Int. Sw15).

International distribution support

In terms of international distribution support, this scheme is granted to film distributors working outside of Sweden. It “aims to increase opportunities for Swedish feature length fiction and documentary films to obtain international distribution, while enabling increased revenue” ([Svenska Filminstitutet, n.d.h.](#)). To achieve this goal, this scheme supports “the release of Swedish films either in a single or in numerous markets outside of Sweden. Release implies any viewing and promotional materials, campaigns and marketing-related expenses” ([Svenska Filminstitutet, n.d.h.](#)). This support is only available for Swedish films longer than 60 minutes. Crucially, “the grant should be considered an extra resource enabling a more robust film release” ([Svenska Filminstitutet, n.d.h.](#)). Applications are assessed based on criteria such as: “the release and marketing plan as well as [whether] the release and marketing plan has been developed by the distributor in collaboration with the sales agent/producer [and if] the support would substantially increase the film’s potential to reach its audience” ([Svenska Filminstitutet, n.d.h.](#)).

Support for the international launch of films

The SFI also supports the launch of short films internationally. This includes initial support and launch support. The former “should be seen as a support for the preparation of the international launch of finished films and aims to produce relevant marketing material for the film's international premiere” ([Svenska Filminstitutet, n.d.i.](#)), whereas the latter is dependent on the existence of an invitation by a relevant international festival. “The support shall be used to cover approved costs for viewing materials, travel and accommodation, marketing and festival presence” ([Svenska Filminstitutet, n.d.i.](#)). This also includes the costs of translating and subtitling the film to English. Finally, in the case of Swedish minority producers, they can “seek support for travel and accommodation, up to 50 percent of the cost, for the film's Swedish co-producer if the film is shown in a context where his presence benefits the film's commercial and cultural impact” – such



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as “relevant festivals, conferences and political contexts” ([Svenska Filminstitutet, n.d.l.](#)) The SFI also supports the launch of games and documentaries ([Svenska Filminstitutet, n.d.m.](#)).

Other schemes

Moving Sweden

The SFI has several talent development schemes: Moving Sweden, Wild Card, and Talent development throughout the country ([Svenska Filminstitutet, n.d.f.](#)). They apply to feature films, documentaries, short films and new formats. The first scheme is highlighted due to its relevance to the topic at hand. The goal of Moving Sweden is “to stimulate the renewal of Swedish film and strengthen its regrowth by developing creators and Swedish film in different parts of the country through a high creative ceiling and simpler financing” for “creators who are at the beginning of their film career, but who have already demonstrated their film voice” ([Svenska Filminstitutet, n.d.c.](#)). This scheme is a collaboration between the SFI and Swedish Television. It was initiated in 2013 and accompanies projects from the beginning to the end at their première. Moreover, “projects that have been granted production funding also have access to advice and meetings with the distribution and exhibition unit and the international unit at the Swedish Film Institute” ([Svenska Filminstitutet, n.d.c.](#)). Crucially, Moving Sweden comprises production support from the SFI, co-production investment, and the pre-purchase of screening rights from SVT ([Svenska Filminstitutet, n.d.c.](#)).

MiNi-MiNo

Finally, one should also recognise the one-off funding scheme established by the SFI that is focused on the production of short films in Swedish minority languages lasting a maximum of 10 minutes. The MiNi-MiNo programme supports productions which are intended for children aged 6 to 9 years old and of which at least 50% of the dialogue is in one of the following minority languages: Yiddish, Romani Chib, Meänkieli, Finnish and Sami. Applications are assessed based on “the film's originality, craftsmanship and urgency, the director/screenwriter/producer constellation, conditions for implementation, whether the film contributes to the development of Swedish film and promotes the minority language it aims to promote” ([Svenska Filminstitutet, n.d.o.](#)).



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Children and Young People; Distribution and Screening

Moreover, the SFI supports activities such as school cinemas and other activities targeted at children and young audiences, as well as film distribution and exhibition, that is, “funding for new equipment, cinemas, audience analysis as well as distribution and promotion of film in Sweden” ([Svenska Filminstitutet, n.d.c.](#)).

Swedish Film Database

It should also be stated that the SFI is also responsible for the Swedish Film Database, which lists Swedish films and film professionals and provides information about Swedish films and tourism film festivals ([SvenskaFilmDatabas, n.d.](#)). Additionally, the SFI presents the Guldbaggen Awards, celebrating outstanding contributions to Swedish film ([Guldbaggen, n.d.](#)). Finally, the SFI supports Filmarkivet.se, a website that makes available in Sweden archival moving image material that is otherwise difficult to access, that is, shorts, non-fiction films, news reels, commercials, and films that reflect the transformation of Swedish society ([Filmarkivet, n.d.](#)).

Sub-state level funding

As mentioned above, Sweden is a state composed of several regions and this is reflected in corresponding available funding schemes.

Film Funds

The main Swedish film funds are Film i Skåne, Filmpool Nord, Film Stockholm and Film i Väst. Film i Skåne is based in Ystad (southern Sweden). It is a resource for film professionals and a production centre, acting as co-producer of films that are expected to achieve large audiences and critical acclaim, prioritising films with a local connection. Moreover, financed films must also meet both national and regional requirements, with a particular emphasis on films intended for children and young audiences ([Filmiskane, n.d.](#)). In Northern Sweden, Filmpool Nord, based in Luleå, produces both film and television and works with film programmes in the region, specifically targeting children and youth ([Filmpoolnord, n.d.](#)). As for Film Stockholm, it also co-produces and invests in short films, documentaries, feature films, and TV dramas that take place in the region. This fund also provides professional training and supports talent development ([FilmStockholm, n.d.](#)).

Film i Väst is based in southwestern Sweden, and focuses on projects that have a strong likelihood of achieving broad international outreach or selection at major international film festivals,



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supporting shooting and post-production financing with a 100% spending requirement in the region ([Film i Väst, n.d.b](#)). It should be noted that Film i Väst plays a particularly important role as a co-producer, regional film fund, and public company in Sweden. It tends to step “in early on as a co-producer, thus financing between 5% and up to 30% of a particular film’s budget in the form of co-production investment/equity” (Hedling, 2018, p. 179). In doing so, it has not only “attempted to establish itself as the centre of an audiovisual cluster, it has also methodically made an effort to involve a larger European production context as a commonplace collaboration space” (Hedling, 2018, p. 176) in Sweden. Finally, Norrköping Filmfond should also be mentioned. As has been written elsewhere, these “regional film funds collaborate with the DFI, Denmark’s national agency for film and cinema culture, as well as with the regional film commissions in Denmark” (Sunngrén-Granlund, 2023, p.183).

The commissioners of regional film funds have two main responsibilities: to develop the regional film industry by supporting prospective producers and crews and to market their regions as attractive market locations. In the framework of the latter, film commissioners go to international film festivals occasionally (Int. Sw17).

Film Commissions

Additionally, Sweden has several Film Commissions, some of which operate under the auspices of film funds (Southern Sweden Film Commission, Film Stockholm, Film i Väst). They support international and Swedish film producers and provide local support for their respective regions. Film på Gotland constitutes another noteworthy commission.

3. BILATERAL, REGIONAL AND MULTILATERAL FUNDING

Although primarily a national responsibility, the promotion and support for the international promotion of national film industries can also be based on bilateral, regional and multilateral mechanisms, which aim to respond to the challenges of financing, transnational distribution and cultural influence, by encouraging collaboration between states. This section examines the various policy tools implemented to support film co-production, distribution and film visibility distinguishing between European instruments, co-production agreements and regional funds, as well as specific and thematic programmes. The countries studied have co-production agreements with European



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and non-European partners, as well as dedicated programmes and funds, often in partnership with other institutions. At the same time, they actively participate in European initiatives that encourage transnational collaboration and the circulation of film works. These mechanisms play an essential role in the development, funding and international circulation of national film productions.

3.1 European Initiatives

3.1.1 MEDIA programme

The MEDIA programme was launched in 1991 and has gone through several cycles, until its integration into the Creative Europe Framework Programme 2021-2027. The aim of this programme is to promote mutual aid between networks of national professionals and a certain sense of 'Europeanness' (de Vinck, 2014). As such, this programme seeks to allow national films to go beyond their state's borders to find an audience, and to aim to reduce the disparities among EU Member States. The MEDIA programme is notably designed to foster bilateral collaborations and enhance multi-country partnerships in the audiovisual sector (Pellino, 2023). Its overarching goal is to strengthen the industry by embracing the motto 'Unity in Diversity' (De Smaele, 2004), which underpins the core values of cooperation and cultural exchange. These initiatives serve a dual purpose: they not only aim to elevate European filmmaking as a key economic driver but also underscore its importance as a cultural force on the global stage. By doing so, they help preserve and promote Europe's rich film heritage, reinforcing its influence and relevance in the global audiovisual landscape (Erickson & Dewe, 2011).

Europa Cinemas: supporting independent european film exhibition

Europa Cinemas is a key European initiative aimed at supporting the exhibition of independent European cinema. Established in 1992, the programme is funded by the CNC, the MEDIA Programme, with additional support from the French Ministry of Foreign Affairs, Eurimages, and Euromed Audiovisual (Jäckel, 2007). Originally comprising around 30 exhibitors, the network has grown significantly and now includes 1,302 cinemas with 3,192 screens across 39 countries. Together, the Europa Cinemas network accounts for nearly 60% of the admissions to independent European films outside their country of origin ([Europa Cinemas. 2025](#)).

The programme's focus is predominantly on Europe, where more than 2,900 screens benefit from its support. Meanwhile, Asia, America, and Africa together account for fewer than 300 screens ([Europa Cinemas. 2025](#)). France played a pivotal role in the creation of Europa Cinemas and has



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remained a significant contributor to its maintenance and success (O'Shaughnessy, 2011). Europa Cinemas primarily allocates its financial support to cinemas that screen a significant proportion of non-national European films, with 80% of funding directed to this goal. The remaining 20% is earmarked for activities aimed at engaging young audiences (Jäckel, 2007; [Europa Cinemas, 2025](#)). Funding varies depending on the size of the cinema, with single-screen theatres eligible for up to €15,500 annually, and cinemas with 15 or more screens eligible for as much as €50,500 per year.

Films on the Move Grant

Funded by the EU's Creative Europe - MEDIA strand and devised as a non-refundable grant, the [Films on the Move](#) support scheme targets European distribution companies, European industry professionals to aid the film distribution of feature films, documentaries and animations. This grant applies to creative content whose copyright was established in 2023 and onward ([Italy for Movies, n.d.b](#)). It also introduces certain other eligibility requirements. The eligible projects shall involve at least seven distributors, two out of which shall be from small or very small capacity countries. Nevertheless, the majority of the producers shall be from the Creative Europe - MEDIA strand countries. The work subject to the grant shall not be less than 60 minutes ([Italy for Movies, n.d.b](#)).

European Film Distribution Fund

The [European Film Distribution Fund](#) (EFDF) is devised as a non-refundable grant for European distribution companies to financially support the distribution of certain broadcasts and for the digital space. It allocates €1,000,000 per project to eligible. To be eligible for the EFDF, the applicants shall be legal entities established in the EU Member States or non-EU States that participate in the Creative Europe programme and shall be actively operating in the audiovisual sector. This last criterion requires the applicants to be the holder of theatrical distribution rights and to be registered in the country concerned. The revenues generated with the aid of the EFDF shall be reinvested in the co-productions of non-national European films produced in the abovementioned eligible countries, plus the acquisition of distribution rights, promotion, marketing and advertising of such films ([Italy for Movies, n.d.a](#)).

3.1.2 European Film Promotion

EFP is a network of 38 national institutes and is financially supported by the MEDIA programme. The network's aim is to promote the visibility and competitiveness of European cinema internationally. To this end, EFP collaborates with international festivals, organises and finances



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promotional campaigns, establishes partnerships between European and non-European cinema professionals, etc. The network also promotes values such as diversity and inclusiveness and is committed to sustainable practices ([European Film Promotion, 2023](#)). EFP allows its members to collaborate in the creation of events and activities to promote the diversity of European film in major film festivals and markets, especially outside of the EU. While this scheme was discussed by some interviewees as helpful, others saw their focus on feature films and professionals working therein as too specific (Int. Dk6, 2024).

3.1.3 European Film Festival

The European Film Festival is a programme that supports European delegations abroad that have been organising European film festivals since 2018 ([Cineuropa, 2024b](#)). Promoted by the European Commission, the programme is managed by a consortium headed by the Goethe Institute, assisted by the Institut français and Cineuropa, a cinema and culture information website cofounded by the EU under the MEDIA programme ([Cineuropa, 2024b](#)). European Film Festival has a budget of around €1,000,000 per year ([Institut français, n.d.c](#)) and awards prizes divided into 17 categories such as best film, best European film, best documentary, etc. ([DFI, n.d.c](#)). This initiative aims to assist European delegations abroad with several services, including the provision of a repertoire of films for which they have obtained non-commercial broadcasting rights ([Cineuropa, 2024b](#)). In this context, the Institut français has acquired around 30 European films (Int. Fr4). Support is also provided for subtitles, training of members and technical assistance in the organisation of events ([Cineuropa, 2024b](#)). Around 76 EU delegations are involved in the organisation of film festivals ([KEA European Affairs, 2015](#)).

3.1.4 European Solidarity Fund for Ukrainian Films

In response to the ongoing Russian invasion of Ukraine, a European initiative to demonstrate cultural solidarity was established through the creation of the European Solidarity Fund for Ukrainian Films (ESFUF). This initiative is in partnership with 18 other national film institutes and the European Film Agency Directors Association (EFAD). Initially established on 30 December 2022 and renegotiated on 15 October 2024, the fund aims to support Ukrainian audiovisual creation under exceptional geopolitical circumstances ([CNC, 2024m](#)). Managed by the CNC, the fund had a budget of €1,500,000 for 2024 and has already supported 37 projects since its inception. Ukrainian filmmakers may apply for support at any stage of development, provided they are based in one of the 19 participating countries, which include 17 EU Member States, as well as the United Kingdom and Norway. Co-productions are also eligible, reflecting the fund's inclusive



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and collaborative approach. Financial support is allocated up to €200,000 for fiction films and €90,000 for documentaries ([CNC, 2024m](#)).

3.1.5 New Dawn Initiative

The SFI is a member of European Film Agencies Directors ([EFAD, n.d.](#)). In this context, the SFI supports the initiative New Dawn, a project that aims “to create room for a more diverse perspective, thereby enriching the complete ecosystem of the film industry.” Among other conditions, “the producer and director and/or writer of the production originate from one of the countries of the participating funds by nationality or residency” and “the budget is max €3,500,000 (fiction films) or €800,000 (documentaries). Animated projects are not subject to a budget cap” ([New Dawn Film, n.d.](#)).

3.1.6 The European Film Forum

The European Film Forum (EFF), launched by the European Commission in 2014, is a platform for structured dialogue between policymakers and audiovisual stakeholders. It aims to shape a strategic policy agenda on issues such as digital transition, innovative financing, talent development, and audience outreach. Organised during festivals and markets, the Forum encourages cooperation between EU and national levels, sharing best practices and addressing cross-cutting themes like sustainability and diversity. While the EU provides regulatory support and programmes like Creative Europe, Member States remain the main funders. The EFF’s outcomes feed into future audiovisual policy and funding reforms ([Creative Europe, 2025b](#)).

3.1.7 Former programmes

European projects related to film education have also been implemented by the Institut français. The first is the *CinEd project*, which aims to develop young people’s critical analysis skills through the diversity of European cinematography. It also aims to teach cinematographic techniques. This programme brings together more than 200 training courses in nine different countries and 44,000 young people involved. It continues to operate despite the withdrawal of France in 2021 ([Cined, 2025](#) ; [Institut Français, 2021](#)). The second project is the *European Film Factory*, produced in collaboration with ARTE Education and European Schoolnet. This programme, initiated in 2019, has been financially supported by the European Commission since 2022. In the context of film education, the programme made films considered European cinematographic heritage films available to students and teachers of the Creative Europe programme. The platform was available



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in nine languages and had 15,000 users in more than 39 countries. This initiative was stopped in September 2024 ([Institut français, n.d.b](#); [Institut français, 2023a](#)).

3.2 Co-production agreements and regional film promotion initiatives

With the objective of promoting the film industry abroad, EU Member States are setting up several programmes or initiatives with the help of third-party partners. In this section, we will detail two cases: bilateral co-productions and co-production funds. A key rationale for these policy instruments is the recognition that co-productions generally achieve broader viewership than purely national films. This is attributable to two main factors: first, multinational collaboration brings together diverse expertise and creative perspectives, making films more relatable to wider audiences; second, co-productions benefit from larger budgets thanks to support from multiple countries, which in turn enhances their distribution potential (Drake, 2018).

3.2.1 Co-production agreements between France and third countries

Bilateral co-production agreements are a key instrument through which France promotes its film industry abroad. In the aftermath of the Second World War, European countries lacked the capacity to compete with Hollywood's dominance in the global film sector. As a response, national governments introduced policy measures aimed at supporting their own domestic film industries. These measures often restricted access to public funding to nationally produced films, leading to the development of co-production treaties. These agreements enabled international collaboration while preserving national protectionist frameworks (Hammett-Jamart, 2018). An official co-production occurs within the framework of at least a bilateral intergovernmental treaty (Mitric, 2018). France's co-production system is notably formal and structured compared to more flexible models found in countries such as those in the Nordic region. Films recognised as official co-productions are eligible to benefit from the national funding schemes of the participating countries. This mechanism not only fosters collaboration but also supports the development of emerging foreign film industries, which may otherwise lack the resources to finance their productions. Co-producers gain direct access to French subsidies and financial support mechanisms (Cabrera Blázquez et al., 2018).

As of February 2024, France was a signatory to 61 bilateral co-production agreements, including 35 in Europe, six in South America, five each in Sub-Saharan Africa and Asia, four in North Africa, and two in North America, Central America, the Middle East, and Oceania respectively ([CNC](#)).



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[2024c](#)). Co-productions accounted for 40.3% of the films approved by the CNC in 2023, with 2022 marking a record year, where they constituted 50.2% of approved productions, a likely consequence of the post-COVID-19 recovery ([CNC, 2024f](#)). The identification of a potential co-production partner can originate either from film professionals, who suggest it to the CNC, or through diplomatic and policy considerations. According to Int. Fr3, a partner country must align with France's cultural objectives. This includes being a party to the 2005 UNESCO CDCE, having taken similar commitments within the WTO framework, and maintaining legislation that ensures reciprocity. Countries that have adopted a purely liberalised approach to their audiovisual sector are generally excluded.

These agreements benefit multiple stakeholders. For national governments, co-productions attract foreign investment and stimulate the growth of the domestic film sector (Morawetz et al., 2007). For producers, they offer access to dual funding mechanisms and enable higher production budgets. Additionally, co-productions have broader market potential as they are recognised as national productions in more than one country, allowing them to benefit from multiple distribution networks (Amiot, 2018). Beyond financial considerations, co-productions offer cultural advantages: they stimulate creative exchange, strengthen cultural ties between countries, and promote shared values, particularly those endorsed by the EU. Producers interviewed for this study noted that co-productions encourage independent creativity and freedom of expression.

Nevertheless, challenges persist. The legal and administrative rigidity of the co-production framework can limit creative flexibility and complicate collaboration. Logistical issues such as geographical distance, cultural differences, and language barriers further hinder cooperation (Cabrera Blázquez et al., 2018). In the French system, co-productions are considered a strategic cultural and economic tool. However, a hierarchy exists based on the language of the production, with French-language films often receiving preferential treatment. According to the Int. Fr4, a co-production is considered French if France holds 50% or more of the production share, making it eligible for non-commercial distribution rights acquisition. For Int. Fr8, international promotion relies heavily on local counterparts to tailor marketing strategies to regional markets. Int. Fr5 sees co-production agreements as a way to strengthen France's cultural footprint abroad. However, a co-production agreement alone is not always sufficient to ensure success in a given market. In some cases, additional support is needed from institutions such as the CNC or the audiovisual attachés to facilitate connections, raise awareness, and support distribution. This was evident in



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the case of France's agreement with Balkan countries, where the CNC organised dedicated meetings with local professionals to promote the agreement and encourage collaboration.

3.2.2 Special fund for co-production

In addition to bilateral co-production agreements, France participates in more advanced support mechanisms that provide enhanced financial assistance to selected projects. Two notable examples include the Franco-German mini-treaty and the Franco-Italian co-production agreement, both of which offer structured, jointly funded schemes for co-development and co-production.

The Franco-German mini-treaty, signed in 2001 and revised in 2015, offers substantial annual funding for both development and production phases. The available aid includes up to €200,000 for development projects and a maximum of €3,000,000 for production, with the financial burden equally shared by both countries ([CNC, 2022a](#)). For co-productions, the maximum grant is €500,000, of which up to €300,000 can be allocated to the majority producer. However, the total amount granted must not exceed 20% of the film's final budget and is typically allocated in proportion to each country's financial contribution. Applications must be submitted to the CNC in France and to either the Goethe-Institut or German embassies on the German side. Since its inception, the programme has supported 242 projects, comprising 203 co-productions and 39 development initiatives. While initially structured around an annual call for projects, the scheme has allowed for up to three calls per year since 2016. Beyond funding, the Franco-German audiovisual collaboration is enriched by cultural exchanges, including cooperation between film schools, Franco-German cultural institutes, and a biannual Franco-German festival (Int. Fr5; Int. Fr6).

In the Franco-Italian context, the first co-production agreement dates back to 1949, marking one of France's earliest international cinema partnerships (Mitric, 2018). A bilateral co-development fund was introduced in 2013 and replaced by a broader agreement in 2019 ([CNC, 2024a](#)). The programme is jointly funded by both nations with a total annual budget of €1,000,000. Through a Franco-Italian joint commission, the fund issues biannual calls for projects, supporting both feature films and audiovisual series that contribute to Franco-Italian film relations. Development aid can reach up to €50,000 per project, awarded as a non-refundable grant, not exceeding 70% of eligible development costs. For co-productions, the funding can be as high as €200,000, provided it does not surpass 50% of the total expenses. Between 2013 and 2019, 93 projects benefited from



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development aid. Since 2019, 41 projects have received co-production support, and 45 have obtained co-development grants ([CNC, 2024a](#)).

3.2.3 Co-production agreements between Italy and third countries

The Italian State, particularly the MiC and the DGCA, has concluded a series of agreements to establish funds in support of international co-productions. These funds, developed in collaboration with equivalent institutions in specific target markets, aim to foster stronger production ties and facilitate the development of film and audiovisual works. The agreements that are still in force were concluded with France, Tunisia, Portugal, and the Baltic States.

Among the funds created through these agreements, the most substantial is the Italy-France Co-Development and Co-Production Fund, which was created through the agreements between MiC and DGCA and France's *Centre national du cinéma*. Initially established in 2013 and renewed in 2019, this fund supports feature films and series co-produced by Italian and French companies, prioritising theatrical distribution. The fund, with an annual budget of €1,000,000, includes provisions for fiction, documentary and animation series ([DGCA, n.d.c](#)). Similarly, the Italy-Tunisia Co-Development Fund, set up in 2018 in partnership with Tunisia's *Centre national du Cinéma et de l'Image*, promotes the development of co-productions between Italian and Tunisian producers, with a focus on theatrical films exceeding 52 minutes in length. Its annual funding amounts to approximately €280,000 ([DGCA, n.d.c](#)). The Italy-Portugal Co-Development Fund, established in 2017 with Portugal's *Institute of Cinema and Audiovisual*, focuses specifically on feature-length projects for theatrical release. Unlike the other funds, its budget varies annually between €60,000 and €100,000, split equally between both parties ([DGCA, n.d.c](#)). Lastly, the Italy-Baltic Co-Development Fund, launched in 2018 and renewed in 2021, brings together the DGCA and film institutes from Estonia, Latvia and Lithuania. With an annual allocation of €40,000, this initiative aims to support the early development of feature films between Italian producers and their Baltic counterparts. These funds not only enhance Italy's international film presence, they also reinforce collaborative storytelling and market integration across different film industries. Through these partnerships, Italy continues to position itself as a key player in the global film production landscape ([DGCA, n.d.c](#)).

Another important bilateral agreement, signed in October 2017 and ratified in October 2021, was established with the United Mexican States ([DGCA, n.d.d](#)). This agreement replaces the previous one concluded in November 1971, granting access to national co-production support benefits. It



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also enhances operational aspects by establishing a joint commission to oversee its implementation and operation. Concerning additional bilateral agreements, both European and non-European, Italian film companies are authorised to engage with foreign firms in film co-productions ([DGCA, n.d.d](#)).

3.2.4 Co-production agreements between Spain and third countries

Spain has two multilateral film co-production agreements, the Latin American Film Co-Production Treaty and the European Cinematographic Agreement, that facilitate international collaboration and the promotion of Spanish films. In addition, Spain has bilateral co-production agreements with 24 countries worldwide, 18 of which are outside the EU. Out of those, 10 are with Latin American countries (Argentina, Brazil, Chile, Cuba, Mexico, Paraguay, Puerto Rico, Republica Dominicana, Uruguay, Venezuela), eight are with countries with other parts of the world (Canada, New Zealand, China, India, Israel, Morocco, Russia and Tunes) and six with European countries (Germany, Austria, France, Italia, Ireland, Portugal) ([Ministerio de Cultura, n.d.b](#)).

The focus on co-productions is also evident in various initiatives organised at film festivals across Spain. For instance, the San Sebastian Film Festival has hosted the Europe-Latin America Co-Production Forum for the past 13 years, fostering business connections between audiovisual industry professionals from both regions ([San Sebastian Film Festival, n.d.](#)). Other initiatives include the Málaga Festival Fund & Co-production Event (MAFF), which supports the growth of innovative Ibero-American cinema ([Festival de Malaga, n.d.](#)). A co-production and business forum specific to the Animation industry is also available at the Quirino Awards, aiming to connect companies in order to co-produce, co-develop and work at the Ibero-American level ([Ibero-American Animation Quirino Award, n.d.](#)). Additionally, the ECAM Forum is a new initiative designed to foster connections and collaborations between Spain's audiovisual industry and the global market ([ECAM Forum, n.d.](#)).

Different interviewees highlighted that while Europe and Latin America are considered strategic markets, there is a strong interest in increasing participation in the Asian market. The ICAA for instance is currently renegotiating an existing co-production agreement with India and plans to start negotiations for bilateral co-production agreements with the Philippines and South Korea in Asia, as well as with Australia in Oceania. These agreements further expand opportunities for co-production and distribution of Spanish film projects and provide Spanish film professionals access to resources, funding, and international markets. Interviewees consistently acknowledge



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that co-productions are essential not only for gaining access to and exchanging with other professionals and methods of working, but also for the opportunity to explore diverse narratives and perspectives of the world.

3.2.5 Ibermedia

The Ibermedia Programme is a long-standing pan-regional initiative. Since the mid-1990s, it has supported the development, co-production and distribution of audiovisual projects among Spanish and Portuguese-speaking countries in Latin America, Spain, Andorra and Portugal. Italy was part of the programme from 2016 to 2024. Ibermedia offers a range of initiatives designed to promote the international visibility and distribution of Ibero-American films, such as financial support for co-productions, project co-development and training programmes that encourage both collaboration and integration among Ibero-American and European producers ([Programa Ibermedia, n.d.a](#)).

Ibermedia supports the development of feature films and TV series that target international markets, particularly the Ibero-American community. This initiative promotes collaboration between producers from at least two countries. The goal is to create high-quality content that appeals to both local and global audiences. Ibermedia also facilitates the co-production of films by offering technical and financial assistance to independent producers from Ibero-America and Italy. The aim is to promote the integration of Ibero-American production companies into global networks, fostering the co-production of films that reflect the cultural richness of the region. Ibermedia has supported over 1,160 co-produced projects since its inception (for a critical analysis of the programme and its historic development, see Gonzalez, 2020). The programme also provides grants for training aimed at enhancing the professional skills of audiovisual industry professionals. These programmes are open to film schools, universities, and other training institutions and they cover various aspects of filmmaking, from scriptwriting to production and distribution ([Programa Ibermedia, n.d.a](#)).

A new grant, Support for the Distribution and Circulation of Ibero-American Film (Apoyo a la distribución y circulación de películas iberoamericanas), was introduced at the end of 2024. It supports the distribution, circulation and screening of Ibero-American films, thus complementing Ibermedia's existing programmes. Targeting independent distributors in member countries, the initiative seeks to expand the presence of non-national Ibero-American films in local markets and it



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encourages both traditional and alternative (or non-theatrical) distribution and screening methods ([Programa Ibermedia, n.d.b](#)).

In 2023, under the umbrella of the funds channelled through the *Spain Audiovisual Hub of Europe*, Ibermedia Next was launched as a new type of aid. It is aimed at projects that include the application of new technologies in the field of digital animation, as well as in audiovisual content with a high percentage of animation. Ibermedia Next Plaza is a networking platform designed to connect companies and industry professionals in the field of animation. It was also created to serve as a space where creators, studios and other industry players can showcase their work, find potential collaborators and prepare joint applications for Ibermedia Next funding opportunities. Spain invested €3,300,000 in this initiative, distributed between 2023 and 2024. Furthermore, at the end of 2024, the Spanish Ministry of Culture announced an additional €6,000,000 investment in the Ibermedia Programme that will be used to launch two grant calls in 2024 and 2025, focusing on digital animation and audiovisual projects incorporating VR, XR and augmented reality (AR) ([Ministerio de Cultura, 2024](#)).

3.2.6 Nordic co-productions

Denmark, Finland and Sweden are a strong example of regional clusters of film co-production. This was recognised by one of the interviewees: “I am a huge fan of [...] regional co-productions [...]. The Southern Germans will collaborate with the Austrians and the Swiss, the Luxembourgers will co-produce with France, Germany, Holland, Belgium, and maybe Switzerland. And the Nordics co-produce, the Scandinavians co-produce [...], the Baltics with each other. So there is this proximity of the way you are thinking, the way your contracts are made, the way your talent works, and so on, cultural effects. And I think these co-productions can make a lot of sense, because we have become so more diluted where our borders are” (Int. Dk5). These collaborations support national and international film promotion. “The DFI, together with the other Nordics, has this system called Scandinavian Films [sic], and they work under an umbrella, and you can [...] apply for quite a bit of funding to promote your film nationally, but you can actually also get funding, for example, if your film gets picked out for Cannes” (Int. Dk5).

3.2.7 Nordisk Film & TV Fond (Nordisk Film and TV Fund)

“Nordisk Film & TV Fond (NFTVF) is a pan-Nordic fund whose objective is to promote the Nordic audiovisual industry through support schemes and initiatives.” ([NFTVF, n.d.b](#)) The fund was established in 1990, and it supports high-quality Nordic films and drama series through top



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financing in Denmark, Sweden, Finland, Norway and Iceland. The supported films include fiction, documentary and animation. It also supports dubbing, inter-Nordic distribution, and industry initiatives that benefit Nordic film professionals. The fund also has an important role to play in making the audiovisual industry greener. The sustainability of production is an important criterion in the funding decisions. Originally, it focused on “distribution [...]”. But what happened was that we started to use each other’s talents and actors [...] and we discovered DOPs, composers, and so the pool of talent subtly became a lot wider” (Int. Sw9).

The fund is led by the CEO, and it employs seven people: three advisors, two administrators, an intern, and a news editor. The fund receives its funding from three sources, the Nordic Council of Ministers, the Nordic film institutes, and the public service and private media companies and streaming services from the region. Based in Oslo, Norway, the fund is governed by a board, which has five members, one from each member country. The board is appointed by the Nordic Council of Ministers. It has six funding programmes: production funding for feature-length fiction films, production funding for drama series, production funding for documentaries, funding for distribution, funding for dubbing, and funding for industry initiatives.

The fund receives approximately 200 applications each year, 70 to 80 for fiction films. The minimum requirement for the applicants of production funding is that the film has distribution in at least two Nordic countries. Top financing means that a film must already have secured 70% of the funding and a significant amount of the funding must come “from at least one of the Fund’s parties” ([NFTVE, n.d.b](#)). This means that the funded projects involve filmmakers who already have experience and recognition. Production funding is not usually awarded to works by debutant filmmakers or producers. The films must have relevance first of all for Nordic audiences and, secondly for international audiences. The distribution support is meant for distributing films to other Nordic countries ([NFTVE, n.d.b](#)).

The funding for dubbing is meant for children’s films that have been successful in the home country and have high audience potential in another Nordic country. This means that children’s films are dubbed into other Nordic languages. Funding for industry initiatives is intended for events that aim to “strengthen the competence of the joint professional Nordic audiovisual community” ([NFTVE, n.d.b](#)). The industry initiatives include “yearly meetings between upcoming filmmakers from the Nordic film schools and the professional industry” and a script programme for Nordic



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scriptwriters (Int Nordic a). The industry initiatives are arranged in collaboration with the film and drama series industry and broadcasters.

The Fund's promotional activities are focused on the Nordic countries, while promotion to the rest of Europe and beyond is the responsibility of national film institutes and foundations. According to a representative of the NFTVF, there is no special organisation in the Nordic countries that promotes only co-productions. The fund understands promotion in a broad sense and it "promotes as much as possible". But it does not have a separate programme for promotion (Int Nordic a). The fund promotes the Nordic film industry generally, but if "something really special happened, we can promote it, we can write an article about it (...) we have to have a journalistic clue to every story we publish, so it's never like pure promotion" (Int Nordic a).

The NFTVF's promotional activities include spreading information about the Nordic co-production system at industry events in a variety of ways, such as showing trailer compilations and holding one-on-one discussions, also outside the industry context, and especially with politicians. Furthermore, the NFTVF has collaborative initiatives such as the Nordic Series Script Award, which is awarded at the Gothenburg Film Festival together with the honorary mention Creative Courage Award. The award replaces in 2025 the Nordic Council Film Prize, which has been awarded since 2018 (Int Nordic a; [NFTVF, n.d.b](#)). The Nordic Series Script Award is awarded for the best screenplay of a series that premiered the previous year and the honourable mention Creative Courage Award is "designed to recognise individuals and companies who dare to take risks and champion new directions in Nordic drama"([NFTVF, n.d.b](#)).

Strategic work on "how to do it better" is an important part of NFTVF's promotional work. In this it has collaborated for example with distributors, trying to find out how to not just export films to other countries but also find audiences for them. The NFTVF understands distribution support as a form of institutional promotion. As another example, it mentioned discussions on the need to tailor film trailers for different countries. The representatives have stressed 'democracy' as the guiding principle of their promotional activities, which means that they cannot promote one country and a particular production above another. While emphasising the broad focus of the promotion, they pointed out that they do not have any promotional campaigns, and they do not engage in commercial promotion (Int Nordic a). The NFTVF ([n.d.b](#)) evaluates its success by collecting statistical information and through questionnaires, surveys and feedback.



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The NFTVF promotes not just individual film productions but also Nordic co-producing itself. As it says, “the good benefits of collaborating with the Nordics, that we can promote” (Int Nordic a). This was confirmed by another interviewee – “it’s a good way of promoting co-producing between countries” (Int. Sw9). One of those benefits, according to the interviewees, is that co-producing with the Nordics is much easier than co-producing on the European level. Moreover, the NFTVF does not demand that productions spend money in another country, which according to the representatives is different from “the European logic”. They object to this policy, because it is not always the most creative solution. Having to hire professionals from other countries may lead to contradictory situations, if the production would rather work with someone from home. One of the interviewees noted: “Not so long ago, even I saw something that I thought, okay. So they travel to this country because in this story, because of that money from that country. And this is what we absolutely don’t want to promote” (Int Nordic a). The representatives strongly emphasised that travelling, as part of the tax rebate system that exists in other Nordic countries except Denmark, is not “a very green solution” (Int Nordic a).

Generally speaking, the benefit of co-producing is that “real co-productions perform better, because there is a lot of money and talent behind such productions. Co-productions have to fulfil certain criteria to get funded, to have certain expertise from another country. The country that funds a film is also interested that the film finds an audience there” (Int Nordic b). In the Nordics, it is difficult to get enough money for production from one’s own country. Therefore, co-production makes it possible to increase the film’s budget and quality. Getting input from another country was mentioned as a significant benefit and in the long run, it often leads to further exchange of expertise and money (Int Nordic b).

Some of the pros and cons of co-production were summarised by one of the interviewees as follows: “Part of our strategy is also to help talent, develop and become more professional, and in every any way we can do, and sometimes, just by co-funding, collaboration and co-production also, the talent gets so much better. And one thing, why it’s also worth funding. Because, for example, when you have feedback on a national level, it’s different when you have it from another country, because they see it with different eyes. But the danger is, if you have too many people saying too many things, if there are like five co-production countries, and everybody wants to say something that can be a horrible mess. So I’m a little bit afraid about such suggestions that to get copyright status and the money back, you have to have an opinion about everything in the process that is really dangerous” (Int Nordic a).



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In addition to the many benefits there are certain potential dangers with co-productions as suggested above. The interviewees returned several times to the issue of having too many funders, who want to have a say in a production. According to them it is often better to have one person in charge to realise her or his creative vision. The aim of NFTVF is to get big audiences for “high-level” films that are the results of strong visions. Encouraging strong vision is why they have launched the above-mentioned award for Nordic drama series and why the award is decided by one person instead of a committee. They think that a stronger artistic vision distinguishes European films from American films and that European filmmakers have the possibility to experiment and “do something odd, something that is not the most commercial thing”, because it received a lot of public support (Int Nordic a).

Charlotte Appelgren noted additional challenges of co-producing that are not restricted to a Nordic context and that were not mentioned by the representatives of NFTVF: “However, there are also challenges which come with co-producing across borders, including potential clashes between crews of mixed nationalities and differing cultural backgrounds, and language barriers. Furthermore, the producers also face a huge challenge while matching and fulfilling the terms, conditions and guidelines of all the various sources of finance from different public film funds at the regional, national and supranational level. It is a real puzzle that takes a skilled producer.” (Appelgren, 2018, p. 271). To the question of how the EU could help Nordic co-productions, our interviewees did not have specific answers. But they suggested that one way could be by helping to keep the productions’ IP rights in the Nordic countries.

Finally, an important scheme funded by the Nordisk Film and Television Fond (as well as the DFI, the Swedish Film Institute, the Norwegian Film Institute, the Icelandic Film Centre, the FFF, Creative Europe Nordic desks and Nordisk Film) is the Young Nordic Producers Club, which fosters Nordic collaboration among younger producers. Every year, the scheme provides masterclasses in Cannes, France, for three days. It has supported more than 300 young Nordic producers (Int. Dk5).

3.2.8 The Five Nordics

The Five Nordics, known until 2024 as ‘Scandinavian Films’, is an umbrella organisation of the Nordic film institutes and foundations, DFI, FFF, Icelandic Film Centre, Norwegian Film Institute, and Swedish Film Institute. Through the Five Nordics, the institutes collaborate on the international promotion of Nordic cinema, film production, knowledge-sharing and promoting a sustainable



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audiovisual industry. Following the new name in 2024, the organisation's activities were reorganised with the goal of more extensive Nordic cooperation: "Our aim is to have a comprehensive collaboration within the Nordic region and together show the international community what the Nordics have to offer in films and as film industries" ([The Five Nordics, n.d.](#)).

In 2023, a representative of the FFF summarised the importance of the organisation: "Scandinavian Films' main idea is of course that together we are stronger" (Int. Fi4). This was reiterated by a Swedish policymaker, who stated: "we try to do as much together as we can. We're a small country, but together we're like at least 25 million, something like that. And if we can put our resources together, we can reach a bigger goal" (Int. Sw15). The collaboration has been intensified in recent years. As a Swedish policymaker stated, today "the Five Nordics are trying to establish partnerships with other sectors. What we did within the Five Nordics before was we did only promotion work. We started that in 1979, something like that, having joint offices in Cannes and in Berlin. But since one and a half years now, we've sort of broadened the scope of what the task of the five Nordics is. Now we try to also work with financing, co-productions, with data sharing, data analysis, and talent development, and communication. Sort of to get the whole scope of a film institute also into the Nordic network" (Int. Sw15). The relation between members has been characterised as close (Int. Fi2). According to one interviewee, the collaboration is so close that one tends to forget that there could be similar collaboration with other European colleagues (Int. Fi5). This being said, it should be noted that its members use the Five Nordics in different ways according to their needs and strategic priorities.

The Five Nordics employs a project manager. It has a board, which is led by one of the countries for two years at a time - currently, Sweden. The main promotional activity of the Five Nordics is to be present at major film markets and festivals. Every year, the organisation is present at the following festivals: Clermont-Ferrand International Short Film Festival, Berlin International Film Festival, Cannes Film Festival, Toronto International Film Festival, and IDFA International Documentary Film Festival Amsterdam ([The Five Nordics, n.d.](#)). For economic reasons, the Nordic countries have a common stand at the markets (Int. Fi2). This action was also justified, in interviewees, through the need for Nordic countries to get more visibility at the markets when they are presented together (Int. Fi1). At film festivals, the Five Nordics arrange Nordic focus events. Each institute helps to find suitable content for these events, but often they are arranged by an external body. This was the case for example at the Transilvania International Film Festival in



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Romania in 2023, where the locals curated the content based on the proposals of the Five Nordics (Int. Fi4).

The cooperation between the national institutes under the Five Nordics also includes data collection, which is considered essential today. Indeed, some of its members are investigating whether it would be possible to cooperate more in financing co-productions. But cooperation of that kind was described as difficult, because each country makes funding decisions based on different criteria. Despite this, the Five Nordics are looking for ways to increase cooperation in film financing, because this is becoming more difficult as budgets decrease. It would be useful to try to help films from small countries to succeed among the dominant countries, as a representative of the FFF pointed out (Int. Fi1).

In this direction, the Five Nordics increasingly enables some of its members to work with other governmental institutions, such as the French CNC (the French National Centre of Cinema) to facilitate co-productions and promotion efforts in specific markets, resulting in an approach to promotion than is broader than what is possible at the national level. It is worth quoting a Swedish policymaker at length in this regard. “Well, let's take the CNC collaboration as an example. We try to identify territories or areas that we think are the most interesting ones for Nordic films. There's a big market, there's some money to get there for co-production. There's also a big market when it comes to actual distribution. It's also interesting because in France you have the Cannes Film Festival [...]. So what we're doing now is we're first working with France and then we're also establishing a relationship with Germany, After that maybe Italy or Spain. The big problem is of course the US because it's so diverse and so big and where do you start? [...] It's also something that was actually initiated by the CNC and us at the same time without us knowing that we had the same idea. Because they were really interested in what's so special about the Nordic cinema that [...] we're over-performing compared to our sizes. So they want to get knowledge from us, we want to get knowledge from them. They have a lot of money, a very, very strong film institute, and a really, really big distribution base. So, what we've done is we've identified areas that we think are interesting to do some kind of collaboration with them. For instance, as I mentioned before, it's talent development, it's co-production, it's film policy. What are you doing in France that we could do in Sweden, and vice versa. And then also doing public screenings in Paris of Nordic films. Just to raise awareness and use the momentum that is now in France for Nordic films” (Int. Sw15).



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This being said, this regional network has limitations. When asked if any of the promotion work of the Five Nordics focuses on Africa or Asia, the Swedish policymaker stated “not as much. We would like to. It's really, really difficult to, you know, not for Asia, that would be of course to do something in Busan, maybe Tokyo, perhaps Hong Kong. But when it comes to Africa, it's much more difficult [even though] we did have a Swedish focus in Durban quite a few years ago when Nashin Moodley was still the festival director there. (Int. Sw15). This echoes statements made by a Danish policymaker regarding the need for further support from the EU to enable national film institutes and stakeholders to build audiences in new global markets (Int. D4).

3.3 Other bilateral and multilateral initiatives

3.3.1 Aid to world cinema distribution

The ‘Aid to World Cinema – Distribution’ programme (ACMD) was established in 2015 to support the distribution and circulation of international co-productions, and it receives support from the EU’s MEDIA programme ([CNC, 2024g](#)). To be eligible for this aid, the company must be established in a country participating in MEDIA or be owned by nationals of that country ([CNC, 2024g](#)). Thanks to a system of points awarded to cinematographers according to their numbers, this makes it possible to encourage the distribution of co-productions with less-prolific countries, such as Belgium (Int.Fr2).

3.3.2 Fund for Young French-speaking Creation (Fonds pour la jeune création francophone)

Third-party support plays a vital role in promoting international collaboration in the audiovisual sector, particularly through the Fund for Young French-speaking Creation, launched in 2017. Coordinated by the CNC, this fund is a collaborative initiative involving film institutes from French-speaking countries, including France, Belgium, and Switzerland ([Fonds pour la jeune création francophone, 2025](#)). Its main objective is to promote cultural diversity by supporting French-language film creation in Sub-Saharan Africa, the Indian Ocean, and Haiti. The fund is particularly focused on emerging filmmakers, especially those producing their first feature films, and operates through three annual calls for projects in the areas of development, production, and post-production. Since its creation, it has supported 156 projects in 24 countries, including 22 series, 34 short films, and 101 feature films. With an annual budget of €523,000, it offers



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co-production support of €20,000 per project. Production support varies by genre: up to €80,000 for fiction or animated features, €50,000 for documentaries, and €52,000 for series. Importantly, the support can cover up to 60% of the total production budget ([Fonds pour la jeune création francophone, 2025](#)).

3.3.3 DEENTAL-ACP Bonus

This initiative is complemented by the DEENTAL-ACP bonus, launched in July 2020 by the CNC with financial backing from the EU and the Organisation of African Caribbean Pacific (ACP) States ([CNC, 2023c](#)). The bonus offers €40,000 to €150,000 to projects led by authors from ACP countries, with the condition that at least three partner companies are involved — two of which must be based in ACP countries. The total allocated budget for the 2020–2022 period was €1,500,000. Notably, the DEENTAL-ACP bonus is compatible with other support schemes, such as the ACM, thereby offering additional avenues for financing ([CNC, 2023c](#)).

3.3.4 Alliance4Development

Alliance4Development (A4D) is an initiative of the Locarno Film Festival. In collaboration with the CNC, the Italian DGCA-MiC, the German Federal Film Board, the Swiss Federal Office of Culture and the Austrian OFI, the A4D' project aims to promote creative and financial collaborations and encourage collaborations between these five partners ([CNC, 2024e](#)). This is another type of initiative to promote collaboration between several states. In total, 85 projects benefited from this aid since 2015. Each year, as part of the Locarno Pro, the creators of the 11 selected projects are invited to the plenary sessions and are invited to participate in various meetings with professionals ([CNC, 2024e](#)).

3.3.5 MyMetaStories

MyMetaStories operates in a field halfway between video games and cinema, offering immersive experiences using Minecraft video games. It is a European film festival initiated by Unifrance in 2023, in collaboration with EFP and with the support of the MEDIA programme, which aims to promote European films (Int.Fr8). The concept is that European films are available within the Minecraft video game, the world's most played online game. According to Renoir (2024), this cross-over between video games and cinema means that the festival can be promoted in a variety of ways, including through the Twitch platform. The festival also collaborates with local and international VoD platforms such as Amazon Prime Video, Apple TV, Sooner and DailyMotion. A



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second edition was organised in 2024 and included seven feature films and 13 short films from 14 European countries, subtitled in six languages (German, English, Spanish, French, Italian and Portuguese). The short films were free to watch in all countries, while feature films were only free in Spanish-speaking countries of Latin America, Africa, Near and Middle East. The feature films were not available in Asia ([MyMetaStories, 2025](#)).

3.3.6 La Fabrique cinéma

The Institut français supports La Fabrique Cinéma, in collaboration with France Médias Monde and the OIF, in close partnership with the Cannes Film Festival ([Institut français 2025e](#)). This is a programme that aims to encourage young directors from emerging countries in the international market, introducing them to industry decision-makers and allowing them to benefit from professional advice during the Cannes Film Festival. Since its creation in 2009, the Cinema Factory has supported 154 projects involving 65 different nationalities, of which 30% of the projects come from African countries ([Institut français 2025e](#)).

3.3.7 Mentoring workshops

French institutions participate in mentoring workshop programmes at festivals. For example, between 2018 and 2021, a mentoring programme was organised in collaboration with the French Institute of Tunisia (Institut français of Tunisia) and the National Centre for Cinema and Image of Tunisia (CNCI), as part of the Mediterranean Film Festival of Tunisia. This programme included participating in a workshop that put the selected directors in dialogue with internationally renowned consultants on their project ([CNC, 2021a](#)).

3.3.8 Super16

Super16 is a non-traditional film school based at the Nordisk Film Studio in Valby, Copenhagen. Every two years, its current members select a new class of young emerging filmmakers to continue the organisation and develop their skills over a three-year period. Super16 is financed by Nordisk Film, Nordisk Film Foundation and PRD as well as the Danish Actors' Association, Danish Playwrights and Danish Film Directors. In addition, the association receives an annual operating grant from the DFI. This school was mentioned in interviews as contributing to developing the Danish talent pool. "The Danish Film School is highly recognised internationally. [...] It's highly competitive to get into that. It means that there are quite a few very skilled filmmakers who don't make it in there. But they still got an alternative school, Super 16" (Int. Dk6).



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3.3.9 Pan Tadeusz exhibition

The IAM supports the international promotion of Polish cinema through initiatives such as film screenings in Lithuania. In collaboration with the Vytautas the Great War Museum in Kaunas and the Romuva cinema, the IAM organised public screenings of Polish films, including *Pan Tadeusz*, directed by Andrzej Wajda, for local Lithuanian audiences ([IAM, 2024d](#)). These screenings aim to promote the shared cultural heritage of the Crown of the Kingdom of Poland and the Grand Duchy of Lithuania, emphasising themes of solidarity, unity, and historical continuity, while showcasing the flourishing period of these former states.

3.3.10 UK/Poland Season 2025

Another notable international collaboration is the UK/Poland Season 2025, a one-time cooperative programme set to take place in March 2025. The initiative featured over one hundred cultural events, spanning film, theatre, visual arts, design and music, and was held across numerous cities in both Poland and the United Kingdom, with the aim of promoting Polish culture, including its film achievements. While the events in Poland are organised and financed by the British Council, the programme in the UK is jointly coordinated by the IAM, the Polish Cultural Institute and the British Council ([IAM, 2025](#)).

3.3.11 Eurimages fund

Eurimages, established in 1989, is the transnational cultural support fund of the CoE, aimed at fostering international co-productions among its Member States, pursuant to the 1992 CoE Convention on Cinematographic Co-productions (as revised in 2017). As of 2025, the fund includes 38 of the CoE's 46 Member States, alongside one Observer State, Canada ([Council of Europe, 2024a](#)). The fund primarily provides advances on receipts to two or more co-producing partners from different countries to encourage collaborative film creation. Initially, France played a pivotal role in financing the fund, covering approximately half of its budget (Jäckel, 2007).

In 2025, Eurimages operates with an annual budget of €27,500,000, funded through contributions from its CoE Member States and reimbursements from previously supported projects. The eligible co-production should comply with several requirements, in line with the aforementioned CoE Convention. These creative projects shall not exceed 70 minutes, and they shall have at least two co-producers from different CoE Member States. In 2023, co-productions accounted for 95.7% of the total budget, with 94 projects selected from 264 eligible applications. On average, each supported project received approximately €277,200. While most funded projects were European,



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the selection included films originating from the Balkans, Africa, the Middle East, Asia, and the Americas. Notably, only one selected project involved a bilateral partnership, in this case between Belgium and Norway. In addition to co-production support, Eurimages allocated €550,000 (2% of the total budget) to 63 cinema exhibitors for programming assistance. The remaining €644,000 was distributed across various supplementary initiatives, including 15 prizes, 13 sponsorships, seven exceptional contributions to production costs, and three additional grants ([Council of Europe, 2024a](#)).

4. NATIONAL FILM DIPLOMACY IN LIGHT OF THE NEW POLICY CONTEXT AND TECHNOLOGICAL TRANSFORMATIONS

This chapter explores how European States are adapting their national film diplomacy in a time of profound transformation through three lenses: the EU's growing influence in the coordination of film-audiovisual policies, the economic upheaval caused by the COVID-19 pandemic, and the reshaping of film production and distribution circuits by VoD platforms. The section begins with an analysis of the European framework, highlighting the EU's supportive role in shaping national approaches to film diplomacy through soft governance, funding instruments, and policy guidelines. It then examines the lasting impacts of the pandemic on production models, support mechanisms, and internationalisation priorities. Finally, and as a consequence of the COVID-19 crisis, it considers the rise of VoD platforms, whose disruption of traditional territorial logics in cultural diplomacy calls for a reconfiguration of public strategies (Vlassis, 2021). Taken together, these three dynamics illustrate how national film diplomacy is being reshaped by multilevel pressures (supranational coordination, global crises, and digital transformation) encouraging states to revisit how they approach film diplomacy on the international stage.

4.1 The role of the EU

The EU's engagement with culture is rooted in the formal integration of culture into the EU's legal framework through Article 128 of the Treaty on the European Community (TCE), introduced with the Maastricht Treaty and later renumbered as Article 167 of the Treaty on the Functioning of the EU (TFEU). This article mandates the incorporation of cultural considerations into all EU activities, thereby legitimising the Union's cultural interventions across policy domains (de Vinck, 2014). Within this legal framework, culture is recognised as a shared competence between the EU and its



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Member States, with the Union traditionally focusing on support measures and the preservation of cultural heritage (Pauwels, 2014).

Although cultural policy remains largely within the purview of national governments, the EU has established several multilateral programmes and regulatory instruments, such as EUNIC and Creative Europe, which aim to promote culture at the European level (Henze & Wolfram, 2014). In the audiovisual domain, the EU has pursued multiple initiatives, most notably the MEDIA programme, to support European cinema both domestically and internationally. These efforts are intended to foster co-productions that embody European values and promote cultural diversity (Jäckel, 2007). However, this European orientation often diverges from national policy objectives. While Member States typically fund cinema to reinforce narratives of national identity, EU-level audiovisual funding mechanisms pursue more transnational aims, although, at times, these initiatives may also spotlight distinctive cultural attributes (Hammett-Jamart, 2018). In this context, EU external cultural policy positions culture both as a diplomatic asset and a vector for the promotion of diversity (Pellino, 2023; Jäckel, 2007).

De Vinck (2014) identifies a dual imperative underpinning EU cultural policy: to stimulate economic and industrial growth while simultaneously preserving and promoting cultural diversity. Consistent with the principle of shared competences, the MEDIA programme has evolved through successive iterations since 1991 and is now embedded within the Creative Europe framework for 2021–2027. The programme seeks to strengthen professional networks across the Member States, encourage the development of a pan-European cultural identity, and facilitate the transnational circulation of national films. It aims to address the disparities in audiovisual production and distribution capacities among Member States.

This orientation was further reinforced by the 2018 revision of the Audiovisual Media Services Directive (AVMSD), which introduced binding regulatory provisions, including local content quotas and mandatory investment obligations for VoD platforms (Vlassis, 2023). As one interviewee noted: “the EU is developing regulations on financing by VoD platforms, which obliges these platforms to invest in films upstream as part of the AVMSD, stimulating national industries and giving rise to ‘Originals’” (Int. Fr3).

The proposal to establish a formal ‘European cinema’ label as a means of enhancing the global recognition of European audiovisual content has also been the subject of considerable debate



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among interviewees. On one hand, there is widespread acknowledgment of the shared values -such as cultural diversity and artistic freedom - that underpin the various national film industries in Europe. Collaborative efforts, particularly through partnerships with national institutes and EU embassies, are widely supported as they enhance the circulation of European films and contribute to the vitality of the EFI.

On the other hand, scepticism persists among national authorities and industry stakeholders regarding the viability and desirability of a European-level film identity. In particular, there are concerns that such a label could obscure national specificities and dilute the cinematic distinctiveness of individual Member States. Stakeholders fear that aligning with a European cinema label could erode the international standing of national or regional cinema, long regarded as a prestigious brand, as in France, Spain, Nordic cinema, etc. Additionally, professionals are wary of ceding national prerogatives, such as the autonomy to negotiate co-production agreements or oversee the promotion of national film works, in favour of a collective European framework that could be administratively burdensome and complex. Moreover, there is a prevailing apprehension that participation in such collective initiatives may entail disproportionate national contributions, but without yielding equitable returns in terms of film promotion.

4.1.1 France

France has consistently played a leading role in shaping and advancing the EU's audiovisual policy frameworks, often acting in concert with other Member States (Pellino, 2023). Notably, it has been a proactive participant in successive cycles of the EU's MEDIA programme, which since its inception in 1991 has provided financial support to enhance the visibility of European producers and distributors at key European and international events ([Hoefert de Turégano, 2006](#)). These initiatives are designed not only to foster bilateral and multilateral audiovisual collaborations across Europe (de Smaele, 2004) but also to position European cinema as both an economically viable sector and a critical cultural force, thereby strengthening its global profile while preserving the continent's film heritage (Erickson & Dewe, 2011).

Despite the robustness of France's domestic subsidy system for the audiovisual sector, which reduces its dependency on EU funding relative to other Member States, European support is nevertheless regarded as a valuable supplementary resource (Int. Fr4, 2024). However, French authorities have frequently expressed dissatisfaction with the scale of EU programme budgets, often lobbying for their expansion. Such proposals are typically resisted by Member States more



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sceptical of EU involvement in cultural and audiovisual policy (Jäckel, 2007). French institutional stakeholders have also voiced concerns over the underfunding of promotional activities outside Europe. While the EU has maintained its commitment to supporting existing schemes (Int. Fr3, 2024), some industry professionals argue that promotional efforts are more effectively managed by distributors, who possess the requisite market expertise and audience networks (Int. Fr2, 2024).

Nonetheless, the EU has implemented initiatives to enhance international cooperation and visibility for European cinema. One key mechanism is EFP, which supports collaborations between European and non-European industry professionals ([European Film Promotion, 2023](#)). Unifrance plays a leading role in promoting EFP initiatives, including MyMetaStories, which showcases a curated selection of European films. Additionally, the European Film Festival, which features one film from each Member State, provides significant international exposure to European cinema. As one interviewee observed, major international festivals inherently serve European interests, as the majority of participating films are either fully European productions, co-productions, or recipients of EU funding. This stakeholder also advocated for the development of a more unified arthouse film network to strengthen European cinema's global reach (Int. Fr7). Pellino (2023) similarly argues that national cultural institutes could better advance Europe's cultural identity by leveraging the richness of its internal diversity.

The EU also assumes a critical role in trade negotiations, which are conducted by the European Commission with the objective of “[...] defending cultural diversity and ensuring that audiovisual services are not liberalised under these agreements, to retain the greatest possible room for manoeuvre to be able to develop and implement [support] and regulatory policies in this sector” (Int. Fr3). In parallel, the EU develops regulatory frameworks - such as the AVMSD, to stimulate national audiovisual industries (Int. Fr3; Vlassis, 2023).

However, national authorities in France hold a nuanced and often ambivalent perspective on European cinema. On the one hand, they acknowledge the existence of shared values among European film industries, particularly with respect to cultural diversity and artistic freedom. French authorities support initiatives such as European film festivals and cultural diplomacy programmes that are jointly implemented with national cultural institutes and EU embassies. These multilateral mechanisms are recognised as essential to the promotion of national/European films across EU Member States and abroad, as well as to the health of the broader audiovisual market. On the other hand, significant scepticism persists among industry stakeholders regarding the concept of a



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singular 'European cinema'. The term 'Euro-pudding' is frequently invoked to criticise perceived homogenisation and the potential erosion of national film specificities (Int. Fr1, Int. Fr3). In the French context, there is particular concern that national films may lose their distinct international identity by being subsumed under a less-recognised European label (Int. Fr8). Furthermore, stakeholders fear the loss of key national prerogatives, such as promoting French cinema abroad or negotiating independent co-production agreements (Int. Fr3; Vlassis, 2016a).

4.1.2 Spain

Spain has been a member of the EU since 1986 and actively participates and benefits from EU programmes for the audiovisual sector. It has a role in key decision-making bodies of European institutions, as a member of the management committee of the Creative Europe Programme, the Board of Directors of the Eurimages Fund and the Board of the EFP network. It is also involved in the European Film Agency Directors Association, which unites directors of national film agencies across the EU and beyond. All these organisations and institutions work together to develop and implement audiovisual policies and promote European cinema globally ([Ministerio de Cultura, n.d.b](#)).

Although the audiovisual industry in Spain receives financial support at the national level, European funding is essential. As noted, many of the programmes and initiatives currently in place in the country come from European funds. Initiatives such as the Spain Audiovisual Hub of Europe, the former ICEX's Spain Audiovisual Bureau, and the umbrella brand Audiovisual from Spain, were made possible due to European funds and have been crucial in further developing and promoting the Spain audiovisual sector internationally. It is therefore not surprising that all experts interviewed emphasised the critical role of the EU's support for the Spanish film industry. They also highlighted that initiatives developed at both the state and sub-state levels in Spain are designed to align with the EU framework and complement programmes initiated at the European level. Having said that, some interviewees noted that better coordination between Spanish institutions and European support channels is needed. The upcoming reduction in EU recovery plan funds presents both an opportunity and a challenge to focus on integrating Spanish talent and productions into EU programmes to enhance their international visibility and growth.

Another key focus identified by interviewees in Spain was the prominence of film co-productions at the European level. Spain actively supports this model through agreements, such as the 2018 one with the CoE, and is currently actively involved in the negotiations for a European agreement on



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TV series co-productions. According to some experts, beyond their economic benefits, co-productions carry significant political and ideological value, as they contribute to the construction of a European community, fostering collaboration and reinforcing the European spirit among Member States. While Spain has made progress in aligning with EU efforts, especially through co-productions, it was highlighted that there is room for improvement, particularly in fostering collaboration between Spanish institutions and their counterparts in other countries.

4.1.3 Italy

As one of the six founding Member States of the EU since 1958, the Italian Republic is among the States that contribute to and benefit from the EU's funding schemes to enhance the European audiovisual market. Despite the historical importance of Italy to the EU, the European Single Market and the EFI, there is a lack of information or data on the role that the EU plays in the development of the IFI in general, and particularly the international distribution and promotion of Italian cinematographic content. Therefore, this section focuses briefly on the funds devised to help the internationalisation of the EFI, which have already been explained in the previous sections of the report at hand.

As of March 2025, there are three transnational funding opportunities currently on offer, all managed under the framework of EU cultural and funding programmes, mainly of the Creative Europe - MEDIA strand (Sotto-Programma Media), whose contact point is the [Desk Italia - Europa Creativa](#). These opportunities are as follows: the EFDF, TOCS, and the Films on the Move Grant ([Italy for Movies, Funding, n.d.](#)). The funds are managed by the DGCA in partnership with Cinecittà S.p.A. Additionally, Creative Europe - MEDIA funds EU-supported film festivals, of which the [Venice Film Festival's Venice Gap-Financing Market](#) is one of Italy's main showcases.

4.1.4 Greece

As already reported, Greece's Film industry has a strong and steady relationship with the EU, both from a regulatory binding viewpoint as well as funding schemes and networks. According to the former Greek Film Centre CEO, "networking between countries and regions with similar filming, cultural and/or financial roots makes it easier to attract large scale productions" (Int. Gr2). Moreover, regulating and shaping the EFM is rather complex, due to diverse development policies, financial inequalities, geographical challenges and different cultural perspectives and opportunities, especially present in Southern Eastern Europe and the Mediterranean region. To



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develop a strong and competitive EU market beyond its borders, the EU must streamline its film development policy by taking into account diverse challenges (Int. Gr5):

- Digital transformation and new technologies in the CCI's. New digital technologies have a strong impact on film development, all development, and production and promotion levels. The need to adjust to the new digital challenges is more evident in SMEs economies, like Greece.
- AI Policies. Alongside the alignment with the new digital techniques on the film industry, the use of AI on and off screen (from the first idea to final distribution), needs to find a balance between the freedom of the creators and the new digital elements to secure AI's fundamental role into the film ecosystem. In Greece, there are initiatives of reskilling and up-skilling of film professionals on AI in the film productions, such as CinemAI (30-31/5/2024) in partnership with Creative Europe and Hellenic Film Commission in order to highlight all issues concerning rapid development of AI in the filming industry and the CCI's, in general.
- Sustainability and greening policies. In the same context, greening policies are an extra layer for implementation in the EU film productions in a sustainable and cost-effective way.
- Language and cultural barriers. It is important to find ways of promoting national film works to diverse markets without losing their cultural footprint.
- Enhancing EU and national film value on the global market, where there is stiff competition with co-productions and strong marketing strategies. It is important to focus on the uniqueness and value of local productions.
- Sustainable financial incentives, with a proven added value in national economies as a competitive component of a national cultural policy. State aid should co-exist with private aid initiatives, covering all stages of film development.
- Geographical challenges, where it is important to stress the engagement in different stages of film productions. For instance, the application for funding a film production (eg. cash rebate) may exist in one country but if the project is co-production, that engages different locations in different countries.

To tackle all these challenges, it is important for low production Member States such as Greece to secure systematic and long-term partnerships with the European bodies in the CCI's so that Greece can leverage the power of EU countries with strong promotion strategies on film, such as France and Italy (Int. Gr3; Int. Gr4).



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4.1.5 Poland

The EU plays a significant role in supporting and promoting the Polish film industry internationally through a variety of programmes and initiatives. One of the main tools is the aforementioned MEDIA strand of the Creative Europe programme, which aims to strengthen the European audiovisual industry ([Creative Europe, 2025a](#)). This programme offers financial assistance for the production, distribution, and promotion of films, thereby enabling Polish filmmakers to expand their reach on the international stage.

It is important to note that the coordination of EU programmes is managed by the Polish Film Institute, which collaborates with initiatives such as Creative Europe to secure supplementary funding for the international promotion of Polish films at festivals and film markets. The Polish Film Institute also acts as a liaison for foreign partners looking to engage with the Polish film industry. As part of the European Film Forum (EFF), events such as panel discussions are organised, for example, 'Selling Points: How to Promote Polish Film Abroad?', which explore strategies for enhancing the visibility of Polish cinematography in international markets. These sessions, co-hosted by Creative Europe Desk Poland, offer a valuable platform for knowledge exchange and the sharing of best practices in film promotion ([Romanowska, 2016](#)).

On the other hand, the European Film Forum (EFF) serves as a platform for dialogue between policymakers and representatives of the audiovisual sector. The objective of the EFF is to develop a strategic policy framework that opens up new perspectives on the challenges and opportunities stemming from digital transformation, which directly affects the promotion of European, including Polish, cinema worldwide ([Creative Europe, 2025b](#)). In addition, panel discussions such as "Selling Points: How to Promote Polish Film Abroad?" are organised, focusing on effective strategies for elevating Polish cinematography on the international stage. These events, co-organised by Creative Europe Desk Poland, offer a space for the exchange of knowledge, experience and best practices in international film promotion (Romanowska, 2016). ([Romanowska, 2016](#)).

Poland also benefits from the fourth edition of the European Funds programme for the 2021–2027 period ([Ministerstwo Funduszy i Polityki Regionalnej, 2022](#)). Under this new EU financial framework, Poland is implementing operational programmes that provide support for the cultural and creative industries, including the film sector. Film companies are eligible for funding aimed at the internationalisation of their activities, including the promotion of Polish films abroad.



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It is also worth noting that, in light of Poland's upcoming presidency of the Council of the EU (2025), new programmes have been announced to enhance the international visibility of Polish culture and art ([MKiDN, 2024](#)). These initiatives include support for emerging filmmakers and projects with a European scope, contributing to the increased recognition of the Polish film industry across EU Member States.

4.1.6 Finland

The EU's support for the Finnish film industry has been important and this was acknowledged by all the experts interviewed. The Media programme, which Finland joined in 1993, even before it became a member of the EU, has helped the Finnish film industry become more international. Through its development and distribution support and training programmes the Media Programme has helped filmmakers direct their thinking outside the national borders and make films that appeal to international audiences better. It also helped start an international collaboration that was still strange to Finnish producers in the 1990s (Int. Fi2; Int. Fi8). It was even suggested that the kind of Finnish film industry we have today would not exist without the support of the EU (Int. Fi6).

It was noted that the EU's support cannot be more binding than it is at the moment. One interviewee mentioned that when there are many regulations there is the risk that it will harmonise the supply (Int. Fi7). Another interviewee pointed out that the EU's support takes place through programmes and asked how else it could be arranged (Int. Fi8). Two interviewees started to reflect on how the EU's power over national film industries could be increased, with the aim of benefiting the EFI as a whole. One respondent, a previous expert at the FFF, suggested that it would be better if film politics, in general, was organised much more on the EU level instead of the national level and if all filmmakers had to apply for production funding directly from the EU. But how this would be arranged in practice was not so clear (Int. Fi6).

Another interviewee considered the possibility of synchronising the national support systems on the European level, with the aim of levelling differences between countries. Now countries have very different resources for filmmaking, which means that countries do not have the same starting point for co-productions. Ideally, all Member States would invest similarly in the film industry. The interviewee admitted that this is politically very difficult to achieve, because the EU cannot intervene in national budgets (Int. Fi8). As regards promotion, the interviewed experts of the FFF did not see how the EU could have a bigger role in the international promotion of European



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cinema than it currently has (Int. Fi8). In general, interviewees stressed the importance of a national film policy.

4.1.7 Denmark

Denmark has been a member of the EU since 1973. Film policy “before 1990 was [...] defined by traditional notions of national culture, and by rather defensive cultural strategies. Before 1987, Danish cinema and Danish film policy were not very internationally oriented” (Bondebjerg, 2016). Indeed, as others have noted, “Denmark’s high level of state investment in film is based on strategies to promote and protect a ‘national film culture’ which began in the second half of 1980 and was concluded in the late 1990s with the establishment of a new film institute and a doubling of funding for films” (Givskov, 2013). Subsequently, the transnationalisation of the country’s film policy emerged partly as a result of the European and international approach taken by director Lars von Trier, who from an early time started to make films in English.

In terms of policy, this transnational approach was reflected in the 1997 Film Act and its restructuring of the DFI. The transnationalisation of Danish film was also boosted by “the establishment of Eurimages by the CoE in 1988 and the Nordic Film and Television Fund (NFTF) in 1990”, which “played significant roles in supporting the increase in Danish-European co-productions” (Bondebjerg, 2016, p. 22 cited in Zhai, 2024). This was reinforced by the transnational focus of the 2011–2015 film agreement, which led to the establishment of the international department of DFI, focused on the promotion of Danish film abroad and on increasing collaborations between Danish and non-Danish film professionals. Alongside the DFI, the Danish public broadcaster DR, while mostly having domestic obligations, has also become “a player in the international market for television content” (Jensen et al., 2016).

Nonetheless, the relationship between Denmark and the EU has been described as highly particular, reflecting “the Danish self-perception of being a minor power with a superior societal model” (Wivel, 2019). This can be seen as explaining to a significant extent the sector’s decision to engage in collective negotiation with streaming platforms, resulting in a strategy aimed at defending not only the country’s film industry but also, indirectly, its social model. This reveals a shift in the Denmark–EU relationship and its translation into film policies, especially when compared with the detailed analysis led by Givskov (2013). The author noted that, more than a decade ago, the EU’s agenda of “economic instrumentalisation” in social and other forms of EU policy resulted in “an increased market orientation expressed in an ongoing monitoring of the



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national market share”, in relation to which “the Danish Government and the DFI mainly [expressed] concerns about the EC’s overregulation of the state’s role in ensuring investment in the sector” (Givskov, 2013). Rather, today Danish film stakeholders have a more ambiguous stance – that can be both supportive and critical – vis-à-vis the EU and its film policies, to which they aim to make a constructive contribution. The paragraphs below identify the main strengths, weaknesses, threats, and opportunities in this relationship identified by interviewees.

On the one hand, EU membership is seen as indirectly strengthening the Danish film ecosystem and capacity to produce competitive films and co-productions. Namely, the EU’s strong copyright system is perceived as crucial, EU regulations on Collective Management Organisations (CMO) and Extended Collective Licensing (ECL) are understood as helpful, and EU copyright exceptions (particularly, fair use and educational use) are understood as balanced and functional. Moreover, MEDIA funding is also seen as a strength. In particular, interviewees mentioned slate funding, co-production support, and the fact that European funding for film “comes in both development and distribution, which is the key difficult moment” (Int. Dk8).

However, interviewees also identify weaknesses in the application process for EU co-production funding. The process is described as bureaucratic, long and complex by some, whereas others describe it as inefficient, impersonal and too heavy for small producers, and not always supportive of artistic experimentation (e.g., Int. Dk2, and Int. Dk5). Existing EU legal limitations to must-carry rules for public broadcasters also create a problem for film promotion (Int. Dk3).

Nonetheless, Danish interviewees think that the EU provides opportunities for growth and improvement and for creating a positive change in their country’s film industry. Namely, they think that existing films and co-productions have an untapped potential in terms of audiences (Int. Dk4), and suggest dedicated EU support to link filmmakers with audience experts in order to guarantee, for example, that cultural archetypes are understandable beyond the local context of production (modelled on Publikum – see above) (e.g., Int. Dk6, and Int. Dk5). On this topic, film professionals express a desire for increased collaboration and opportunities for knowledge exchange between national film institutes and professionals within the Nordic and European frameworks. Crucially, Danish interviewees also express a desire for increased collaboration with stakeholders outside of Europe, namely by reinforcing existing partnerships in potential markets such as South Korea and taking a more strategic approach to market-building (Int. Dk4). Indeed, while sales agents “build up long-term relationships with the distributors, I think it’s fair to say that they will always try to sell the



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next film that they have. Having that more strategic goal about building up a market, I think that's not really possible for them" (Int. Dk4). In particular, interviewees mention networks such as ACE and EAVE, which remain small and do not yet provide training to give producers a holistic understanding of the market adapted to its increasing complexity (Int. Dk5), and the EFP Network's small scale (Int. Dk8).

Additional opportunities mentioned by film professionals include providing the EU with a more central role as a guarantor at a time when "broadcasters are afraid to commit" (Int. Dk6), developing an European film brand (Int. Dk6), and for the targets and goals of EU support schemes to differ more clearly from those of national authorities (Int. Dk4). Related to this topic, EU directives, their iterative development and their flexible translation into national legislation are also seen as providing opportunities for the industry. For example, the EU originally proposed a more limited understanding of the Extended Collective Licensing mechanism; however, lobbying efforts by the sector made this issue optional, which is seen favourably (Int. Dk2).

Finally, Danish interviewees identify EU policy instability and overarching trends in EU film policymaking as central threats that should be addressed to guarantee the sustainability of the Danish film sector. For example, several interviewees believe that new EU policymakers tend to lack an understanding of key discussions (Int. Dk3) (e.g. the potential end of geo-blocking is perceived by film professionals as a significant threat) and/or to apply an economic competition angle to film policies (exemplified by the current focus on competitiveness and consolidation, which is seen as potentially endangering small and medium-sized firms) instead of holding a more balanced view of the relations between the cultural and the economic dimensions of the industry (e.g., Int. Dk1, and Int. Dk3). Additionally, professionals suggest that not enough funding is dedicated to the development stage (Int. Dk6), EU co-production funding supports competing priorities (lower carbon footprint versus cultural diversity) (Int. Dk5), and oversupply can be a threat to the quality and resilience of the European film industry (Int. Dk2).

Finally, Danish film professionals identify several gaps in EU audiovisual policy as threats that require urgent response, suggesting that such legislation should also provide flexibility to EU Member States – potentially in the form of a directive (Int. Dk3). In particular, they highlight the lack of EU regulations establishing minimum rights and release windows for films supported by EU or national funding, the fact that EU legislation does not unequivocally give producers the right to access streamers' data, and the lack of clarity regarding must-carry legislation (Int. Dk2).



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Specifically regarding the 30% quota established by the AVMSD to showcase European content and its extension to streamers, interviewees see this as a positive development but reiterate that cultural quality should also be prioritised in the criteria used to define films as European (Int. Dk1).

4.1.8 Sweden

Sweden has been a member of the EU since 1995. However, initial engagement with EU film funding originated in Sweden's regions: EU funding was seen as an opportunity by Swedish regions to support their development. That is, as was mentioned earlier, the Swedish film industry is highly decentralised as a result of an active policy process that aims to avoid geographic concentration of the economic impact of film on the Swedish labour market. However, despite the development of regional centres with the financial support of the EU's Regional Development Fund, initial assessments stated that "it does not seem like a skilled workforce has developed around the regional centres to a large enough extent" (Hedling, 2008). Almost two decades after this statement was made, it can be said that the strategy was successful. As has been noted elsewhere, "in the beginning of the 1990s, film production in Sweden was heavily centralised in Stockholm. Today, film production in Sweden has decentralised to include three regional film production centres located far from the capital region" (Dahlström & Hermelin, 2006, p. 111). Generally, echoing this literature, interviewees have a positive assessment of the relationship between the European and Swedish film industries, seeing them as self-reinforcing.

The following paragraphs summarise the main strengths, weaknesses, threats and opportunities regarding the relationship between Sweden and the EU in terms of EU film funding and policy from the perspective of interviewees. It should be noted that they engage regularly with Creative Europe funding (in particular, with co-development and with slate development funding) and with CoE's Eurimages to support European co-productions. Although the latter isn't an EU scheme, references are included due to its importance for the Swedish film ecology. In terms of strengths, Creative Europe's European co-development scheme is recognised as particularly useful in facilitating the development stage of collaborative projects with an international perspective. Moreover, respondents feel that the programme is well-suited to the dynamic nature of filmmaking, and that it is flexible and appropriate to the creative process (Int. Sw12). Additionally, slate development funding is identified as pivotal by independent production companies as it offers financial opportunities that would not be viable through national funding (Int. Sw12). Moreover, the holistic approach of Eurimages is appreciated by respondents (Int. Sw13) – particularly, its requirement of the inclusion of different actors across the supply chain, such as producers,



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distributors, and sales agents, at the application stage, and programmes such as European Audiovisual Entrepreneurs (EAVE) or ACE producers (ACE), are seen as beneficial in building connections and fostering the exchange of ideas.

Despite their generally positive assessment of Creative Europe, respondents in Sweden also identify several weaknesses in the process. They describe it as bureaucratic, complex and with a lengthy and costly reporting process, whereas a minority of interviewees adds that it is too heavy for small producers and not always supportive of creative experimentation (Int. Sw10). The environmental footprint of co-productions is another negative aspect (Int. Sw17). The absence of EU gap financing with low interests, i.e. to bridge the gap between the total budgets of co-productions on the one hand and total funding secured on the other hand is also mentioned (Int. Sw9). This being said, as a Film i Väst report notes, “public agencies need to a (sic) wary of playing a ‘useful idiots’ role by supporting development and production that simply de-risks major players’ business models while transferring IP away from producers and creatives to the dominant players” ([Film i Väst, 2025, p. 15](#)). Particularly regarding the CoE, interviewees highlight the tension between the small number of projects funded by Eurimages per year and the number of applicants (e.g., Int Sw12, and Int Sw13), as exemplified by the film marketing and audience development programme that was recently launched. Additionally, one respondent suggests that the European Convention on Cinematographic Co-production is too ambiguous, as is the Audiovisual Media Services Directive when it comes to producers’ rights (Int. Sw9).

Despite these points of criticism, Swedish film professionals also identify untapped opportunities for the EU to better support the Swedish film industry. For example, it could provide more financial and development opportunities, namely for small companies and artistically experimental projects, and for early career filmmakers (Int. Sw10). Funding schemes could also be expanded to better include such segments of the market. One respondent added that existing funding programmes, such as Eurimages, could be restructured into low-budget and high-budget films to simplify and to shorten the application process for low-budget films (Int. Sw10). Additionally, although there is general agreement that Europe already hosts a sufficient number of festivals, some respondents feel that more funding should be allocated to increase their visibility. In Sweden, the Gothenburg festival is consistently mentioned as the most important in this regard, but many interviewees believe that other festivals deserve greater promotional support (Int. Sw17). Furthermore, respondents emphasise the need for a broader understanding of what constitutes success, noting that the latter goes beyond local box office numbers and involves more complex criteria (Int.



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Sw14). For instance, several Swedish arthouse films, while not blockbusters, have achieved significant recognition across Europe. This requires measuring and acknowledging circulation and recognition at the European (rather than national) scale.

Additionally, Swedish professionals believe that there is untapped audience potential for European films. In this light, they suggest dedicated EU support to link filmmakers with audience experts in order to guarantee, for example, that cultural archetypes are understandable beyond the original/local context of production (Int. Sw10) (e.g. modelled, on the Danish Publikum – a Danish company that uses AI and anthropological methods to help film professionals understand and connect with their target audiences). Alternatively, providing funding for the film crew (directors, actors, DOP, producers) to meet the audience at film screenings could, in turn, provide measurable results about expanded audiences (Int. Sw13). Moreover, film professionals express a desire for increased collaboration and opportunities for knowledge exchange both between national film institutes and within the Nordic or European frameworks. More broadly, respondents highlight the existing mismatch between the opportunities offered to producers on the one hand and the available financial opportunities on the other hand – a gap that could be addressed with dedicated EU programmes.

Finally, Swedish film professionals identify several gaps in EU audiovisual policy as threats. In particular, they highlight the lack of EU regulations establishing a minimum levy as well as minimum rights and public release/windows for films supported by EU or national funding: “The EU should help out to get the streamers to have a minimum of tax that they must pay in every country. It's the same regulations. It's the same regulation all over the EU countries” (Int. Sw4). Several interviewees also complain that EU legislation does not give producers the undeniable right to access data. Additionally, several respondents mention the overproduction of co-productions in Europe as having a negative impact on the industry in the long-run by indirectly reducing investment into experimental cinema and newcomers (Int. Sw1). Finally, one respondent suggests that the EU's increasing emphasis on feature film draws the attention away from supporting the production of television projects and suggests a more holistic approach to audiovisual funding (Int. Sw8).



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4.2 The impact of the COVID-19 pandemic

4.2.1 France

This section examines the transformation of the French film industry during and in the aftermath of the COVID-19 pandemic, with a particular focus on market dynamics, production trends, and patterns of audience engagement.

The pandemic had a profound impact on the French film industry. In 2020, Unifrance reported a dramatic 70% decrease in admissions for French films compared to the previous year ([Unifrance, 2021](#)). Similarly, film production declined by 21% between 2019 and 2020, as global lockdown measures impeded production, post-production and screening activities ([Cour des Comptes, 2021](#)). The temporary closure of cinemas severely disrupted traditional theatrical release schedules. In particular, the postponement of major American film releases allowed local productions to capture a larger share of the domestic market. Notably, independent and small cinema operators fared relatively better than multiplex chains, for whom conditional reopening conditions were often economically unviable ([Unifrance, 2021](#)).

In 2021, admissions continued to fall, decreasing by a further 15% compared to 2020, reflecting the lingering effects of the pandemic and ongoing public health uncertainties ([Unifrance, 2022](#)). The lack of a stable screening calendar, due to successive pandemic waves, posed additional challenges for distributors and exhibitors. The increasing shift by American studios to release content directly on streaming platforms further intensified competition and undermined the visibility of French films ([Unifrance, 2022](#)). Nonetheless, 2022 marked the beginning of a tentative recovery. The full reopening of cinemas enabled the release of 3,055 French films abroad, a figure that rose to a record 3,211 in 2023 ([Unifrance, 2023b](#); [Unifrance, 2024](#)). Despite admissions remaining below pre-pandemic expectations, the industry showed promising signs of resilience. However, the anticipated rebound did not materialise in 2024, with admissions falling by 11% compared to the previous year ([Unifrance, 2025](#)). The French domestic and broader European markets continue to serve as the primary outlets for French film screenings. Nevertheless, there has been a noticeable increase in the share of non-European markets, rising from one-quarter to one-third of the total international screening of French films ([Unifrance, 2025](#)). According to the CNC, the disparity between commercial successes and less prominent releases is widening. While a greater number



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of films are attracting viewers, in 2023 the ten most popular titles accounted for 54% of total admissions and 51.1% of international box office revenues ([CNC, 2024n](#)).

Public support for the film sector during the COVID-19 pandemic

The CNC was directly impacted by the downturn in cinema admissions, as it relies significantly on box office-generated taxes. In 2020, it recorded a budget shortfall of €104,000,000, followed by an additional loss of €85,000,000 in 2021 ([Cour des Comptes, 2021](#)). Consequently, automatic support for film production also decreased during this period.

In response, the French government implemented a substantial emergency support strategy to prevent the collapse of the audiovisual and cinema sectors. In 2020, €86,000,000 was allocated across the entire production chain. This amount increased to €182,200,000 in 2021 and was followed by a further €44,200,000 in 2022. In total, the French state invested €313,000,000 in pandemic-related support measures (Boulay-Espéronnier et al., 2023).

The CNC oversaw the allocation of exceptional funding amounting to €426,800,000 between 2020 and 2022. In partnership with the Institute for the Financing of Cinema and Cultural Industries (Institut pour le financement du cinéma et des industries culturelles - IFCIC), five emergency funds were established in 2020 and 2021, totalling €322,000,000. These funds supported disrupted productions and assisted cinema operators. Additional targeted aid was provided to vulnerable actors within the ecosystem, including film festivals, screenwriters, and artistic agents. Support specifically designated for production and distribution reached €21,100,000 and €29,500,000 respectively, during this period ([Cour des Comptes, 2021](#)).

In 2021, a formal recovery plan ('plan de relance') was introduced, allocating €48,500,000 to revitalise the CNC and €116,500,000 for broader industry recovery efforts. According to the Cour des Comptes ([2023](#)), public aid during the pandemic ultimately exceeded the sector's immediate financial needs, indicating the efficacy of the emergency measures. The surplus is expected to be either refunded or reinvested in future cultural projects.

Long-term impacts of the pandemic on the French film industry

Drawing on the preceding analysis, several durable consequences of the pandemic on the French film industry can be identified. Although box office figures have partially recovered, the sector remains in a transitional phase. Contributing factors include the enduring effects of the health crisis



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and the absence of a major international French box-office success capable of reinvigorating global interest ([Unifrance, 2024](#); [Unifrance, 2025](#)).

There is a growing recognition of the need to reframe how the performance of French cinema is evaluated, especially given the changes in consumption and distribution patterns accelerated by the pandemic. For instance, while drama and comedy continue to dominate, there has been a notable rise in animation and a decline in English-language thrillers. Furthermore, the pandemic significantly expedited the audience shift towards VoD platforms, altering traditional viewing habits and affecting cinema attendance ([Unifrance, 2021](#)). This evolution necessitates a strategic rethinking by exporters, who must now integrate streaming platforms into their international sales approaches (Int. Fr1).

Film releases increasingly follow hybrid models, combining theatrical distribution with digital releases. This trend has important implications for how admissions and overall success are measured ([Unifrance, 2025](#)). As the industry continues to adapt, these structural changes will likely shape the trajectory of French cinema in the years to come.

4.2.2 Spain

Just like the rest of Europe (and the world), Spain faced a substantial drop in admissions as cinemas were forced to close due to the COVID-19 pandemic. In 2020, Spain's total box office revenue amounted to only €161,000,000, a 73.8% decline from the previous year and a loss of €454,000,000. Audience numbers experienced a similar plunge, down by 74.3%, from 105 million in 2019 to a mere 27 million in 2020. In the following year, admissions grew from 27 million to 41.4 million and GBO (Gross Box Office) rose from €161,000,000 to €250,000,000, indicating a gradual rebound but still falling short of pre-pandemic levels (Kanzler and Simone, 2021, 2022).

As expected, the pandemic temporarily interrupted the growth trend in Spanish feature film production. However, the decline was less severe than anticipated, as Spain measures production based on the number of films certified by ICAA, rather than their release dates or the start of principal photography. A total of 222 films were certified in Spain in 2020, a decrease from 265 the previous year. In 2021, feature film production levels had largely returned to normal with a total of 263 films certified (Kanzler, Simone, 2021, 2022).

To mitigate the effect of the COVID-19 pandemic, Spain implemented a range of initiatives to support the film and audiovisual sector. These efforts were designed not only to assist local film



production but also to bolster Spain's position as a competitive destination for international co-productions and film shoots. Among the key national measures, the ICAA extended deadlines for films receiving general and selective support for production and deadlines for delivering copies to the FilMOTECA Española.

Additional support was provided to theatres across Spain, which were forced to close due to health restrictions. A newly enacted Royal Decree-Law ([Royal Decree Law 17/2020](#)) established a €13,252,000 Extraordinary Social Fund to provide financial aid to cinemas and support the film exhibition industry. Direct grants were allocated to cover expenses related to the health measures required to reopen theatres, promotional campaigns to enhance visibility for cinema reopenings, as well as initiatives to promote Spanish cinema through advertising and campaigns targeting school audiences ([Ministerio de Cultura, n.d.c](#)). Aid was also channeled via Spain's Autonomous Communities. In Catalonia, for example, subsidies were introduced to compensate for losses incurred by exhibitors during the forced closure period. In an attempt to ensure the continuity of the local film industry's activities, additional measures were adopted, including adapting existing programmes, extending deadlines and promoting hybrid and online formats for funded events.

Other regional governments, such as those in Madrid and the Basque Country, introduced targeted short-term grants to support the local audiovisual industry during the crisis, ensuring that Spanish filmmakers could continue their work despite the economic challenges posed by the pandemic. A campaign named 'Zinemina' was also created in mid-2020 by Zineuskadi in an attempt to revitalise the Basque Audiovisual sector through various social media actions and awareness campaigns to raise public awareness on the importance of supporting the sector as it returns to theatres ([Zineuskadi, 2020](#)). In Galicia, the Hub Audiovisual – Industria Cultural Galega (Audiovisual Hub - Galician Cultural Industry), already mentioned in this report, was established in 2021 as a response to the pandemic's impact on the audiovisual sector.

In addition to these measures, significant efforts were made to boost Spain's attractiveness as a location for international film productions. Tax incentives for international productions were enhanced in a bid to position Spain as a highly competitive filming destination ([Royal Decree Law 17/2020](#)). Notable changes included higher deduction rates for foreign productions, allowing companies to deduct 30% of the first million euro in production costs and 25% of remaining costs, with the maximum deduction per production raised from €3,000,00 to €10,000,000. These incentives also applied to animation and visual effects productions, although the deduction limit for



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animation was reduced from €1,000,000 to €200,000. Among the most notable regional initiatives, the Canary Islands introduced a tax incentive of 50%, making it the most favourable region globally in terms of tax benefits for film production.

Building on these, Spain later enhanced incentives for international productions, offering tax rebates of up to 30% on the first million euro invested (cap per project: €20,000,000/€10,000,000 per episode; at the sub-state level: up to 54% tax rebate in the Canary Islands, 60% tax credit in the Basque Country, and up to 50% tax credit in Navarre). On the international front, Spain allocated €20,000,000 for the international promotion of Spanish films, with a focus on initiatives like the already-mentioned Spanish Screenings XXL. Additional funds were earmarked to support the global distribution of Spanish productions, as well as the online visibility of Spanish cinema, ensuring that Spanish films could reach international audiences despite the challenges posed by the pandemic.

While the pandemic undeniably played a significant role in decelerating the growth of the Spanish film and audiovisual sector, particularly in terms of audience numbers and box office, gross-production levels have largely returned to pre-pandemic norms. Film production activities, which had slowed considerably during the lockdowns and subsequent restrictions, are now back on track. This recovery in production activity, coupled with the sustained efforts to promote Spanish films internationally, has helped the industry regain some momentum, even as the pandemic's long-term effects on audience behaviour continue to be felt.

According to the 'Informe 2024 Spain AVSHub' report on the audiovisual sector ([Gobierno de España. 2024b](#)), although there was a slight decrease in 2020 due to the COVID-19 health crisis, the overall trend in the total number of feature films produced in Spain has shown a consistent increase over the past few years (although co-productions didn't experience the same level of recovery). Currently, Spain is positioned as one of the leading countries in feature film production volume in Europe. The annual progression of revenue in the Spanish cinematographic industry, from 2009 to 2023, reflects a positive trend that is expected to persist in the coming years, with projections extending through 2026.

Many reports were created to understand the impact of the pandemic on the cultural sector in Spain, including specific ones by the Autonomous Communities. The ICEC, for example, in collaboration with CoNCA published the study 'Economic Impact of COVID-19 on the Cultural



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Sectors of Catalonia 2020', in an attempt to quantify the economic impact caused by COVID-19 to the cultural sector in Catalonia throughout 2020. The Basque Cultural Observatory published a number of reports (ranging from 2020 to 2022) on the impact of the pandemic in the cultural sector and a specific report on the impact on the cultural and creative industries, all of them available online. While in Galicia a specific study wasn't made, an analysis of the effect of the COVID-19 period on the audiovisual sector in the territory is included in the report presenting the results of the Audiovisual Hub Galician Cultural Industry ([Axencia Galega das Industrias Culturais, 2024](#)).

When talking to interviewees in Spain, the general impression shared was that although the pandemic initially disrupted production within the audiovisual sector due to facility closures and health safety protocols, production levels have now returned to pre-pandemic figures. However, the same cannot be said for cinema attendance, which has not yet rebounded to previous numbers. In any case, all interviewees stressed the efforts made to continue providing financial support during the pandemic, adapting the requirements for execution and/or justification of grants, taking into consideration the exceptional nature of the situation. Among the lessons learned, many interviewees highlighted that certain measures introduced during the pandemic have remained in place. For instance, funding lines in Catalonia for infrastructure investments related to sustainability and accessibility in theatres, online or hybrid formats for festivals and events, or teleworking policies that allow employees to work remotely.

4.2.3 Italy

The Italian State introduced several measures to cope with the detrimental effects of the pandemic on the IFI. As explained in the report published by the Italian Supreme Audit Institution (*Corte dei Conti*) in 2023 ([Corte dei Conti, 2023](#)), the Italian State's main response has been the adoption of [Law n. 27 of 24 April 2020](#), which authorised the MiC and the DGCA to adopt direct and indirect financial support mechanisms for national and international distribution of Italian films ([Blázquez et al., 2020](#)).

With this law, the MiC was authorised to allocate €28,000,000 to the activities directly involved in the distribution of Italian films in 2021 and 2022 (Law n. 27 of 24 April 2020). Furthermore, the MiC provided certain flexibilities concerning the tax credits initially introduced by the Cinema Law/Legge Cinema (Law n. 220 of 14 November 2016). Distributors of Italian films, as well as international co-productions, benefited from an increase of 30% to 40% of tax credits. Additionally, in 2020, €25,000,000 was invested in the Cinecittà to improve the internationalisation of the IFI



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and to improve and modernise Cinecittà's facilities (Law n. 220 of 14 November 2016). The aforementioned Law also amended [Decree-Law n. 18 of 17 March 2020](#), which was a prompt reaction of the State to the impact of COVID-19 on the IFI. This Decree, as amended, provided a budget for a recovery plan encompassing 2020-2022 and allocated approximately €252,000,000 in the current account and €308,000,000 in the capital account (Decree-Law n. 18 of 17 March 2020).

Moreover, following the COVID-19 pandemic outbreak, Italy has received several rounds of European aid across multiple sectors of the economy, including substantial support for the film industry managed by the MiC - DGCA and Cinecittà ([Blázquez et al., 2020](#)). Related to this, the measures introduced by the Italian State have been referred to as “a global best practice” by Int. It4. Considering the [PNRR's COVID-19 recovery strategy](#) ([NextGenerationEU and Cultura 4.0](#)) as unique, the interviewee stated: “Despite the restrictions, with health and safety protocols and reduced crews, [Italy] managed to continue shooting many films and TV series on the territory, except for the emergency period in early 2020. This allowed productions to still benefit from tax credits, which are [Italy's] main financing tool, even during such a difficult period. Moreover, it also provided content to feed platforms and TV channels post-COVID. I must say that this worked well, and we even financed 100% of the costs related to the COVID-19 health protocols” (Int. It4).

4.2.4 Greece

The experience developed due to the COVID-19 pandemic had an impact on Greece's cultural industry, mainly film and audiovisual industries. Known restrictions and prohibitions revealed specific problems that needed to be addressed immediately. Despite multiple challenges, the Greek film industry showed remarkable resilience in the face of the economic crisis. According to Greek News Agenda ([2025](#)), the overall impact of the Greek film industry on state revenue for the year 2020 is € 3,000,000 per year, whereas only one major foreign film production could maintain 755 work positions and infuse €39,000,000 into the Greek economy. After the first wave of the pandemic, in 2022 the National Public Health Protection Committee and the Hellenic Ministry of Health's COVID-19 Expert Committee issued guidelines and recommendations for the film sector to provide guidance on how to conduct film shoots and sound recording sessions safely in the country ([Hellenic Film Commission, 2022](#)).



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Funding Schemes 2023-2025 offered under the National Recovery and Resilience Fund Greece 2.0 for 2023-2025

New funding schemes were offered under the National Recovery and Resilience Fund Greece 2.0 (Component 4.6 - Modernize and improve resilience of key economic sectors 'Culture as a driver of growth'). Projects were managed by the Greek Film Centre under 'Sub.5 Greek Film Centre: Film Production Support Programmes' and are now under the new organisation, H.F.A.C. - Creative Greece. Funded by the European Commission – NGEU, which is on the EU framework of Greece's National Recovery and Resilience Plan, this funding aims to showcase and assist emerging talent, facilitate funding access for independent producers and strengthen the Greek and European production sector. The total budget of the programme is €7,247,000 and the schemes run from 2023 to the end of 2025. The schemes comprise:

- Co-Production Window: designed to support International Co-productions across feature and short films with funding up to €150,000. This programme aims at creating a collaborative environment with the European production sector, in order to increase the engagement of Greek creatives and other professionals and to attract the investment of foreign capital in the Greek audiovisual industry.
- Development: designed to support film development of feature films, prioritising projects created by producers and filmmakers who kickstart their careers as well as projects with international potential and/or a co-funding strategy, with funding up to €18,000.
- Micro Budget – Short: designed to support the production of the first or the second short film of emerging filmmakers (excluding student films) with funding up to €25,000 per project.
- Micro Budget – Plus: designed to support the production of low-budget feature films aspiring to promote new trends, aesthetic experimentation and diversity with funding up to €70,000.
- The Future Is Here with two sub-schemes: a) 'Other Realities' designed to support the production of original short projects using new technologies (3D, VR, AR, Mixed Reality, 360°, immersive technologies and interactive works, etc.) with funding up to €25,000 and b) 'Audiovisual projects' designed to support the development of audiovisual works (stand-alone or episodic) with international distribution potential with funding up to €15,000. The aim of this pilot scheme is to support audiovisual work that fully utilises current technological opportunities ([H.F.A.C. n.d.d](https://www.hf.a.c.gr/)).



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These aforementioned funds showcase that the budget reaches the amount of €7,247,000 , which is higher compared to the original EU proposal for funding, due to the great impact of the COVID-19 pandemic on the cultural and creative sector.

In conclusion, multi-stakeholderism is a key feature of the Greek media and film industry in the post-pandemic era. This multi-stakeholder model is appealing in several normative instruments, insofar as “bringing a diverse range of actors more closely into the decision-making process allows for the optimum utilisation of expertise. The different actors are able to offer technical and specific insights and perspectives not accessible to policy maker” ([Nikolaidis, 2022, p. 19](#)).

4.2.5 Poland

The COVID-19 pandemic has had a profound impact on Polish film policy, compelling both government and cultural institutions to introduce emergency measures to support the film industry at national and international levels. The pandemic marked a turning point in the development of the Polish film market. As one respondent emphasised, “COVID has been an absolutely dramatic event for the cinema industry, which is struggling to recover. Furthermore, the return to pre-pandemic COVID-19 ticket sales levels is not exclusive to Poland” (Int. Pol7). This highlights the wider repercussions of the pandemic across global cinema.

The pandemic era also triggered a strategic shift among global VoD platforms, which began investing heavily in local content and promoting it on their own streaming services (Int. Pol8). The increase in production costs pushed platforms to abandon exclusive distribution rights in favour of broader collaboration and content exchange (Int. Pol8). The traditional cinema model experienced a notable decline, with streaming platforms rising as primary alternatives for film distribution.

The ongoing transformation of Poland’s distribution landscape is multifaceted, shaped not only by the 2020 crisis but also by technological progress, particularly the expansion of VoD services. Platforms such as Netflix, Max, Disney+ and Amazon Prime have disrupted a distribution system that had remained relatively stable for over two decades (Int. Pol4). This evolution demands a comprehensive examination of both technological and sociocultural factors influencing contemporary cinematography.



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The most significant financial support programmes implemented during this period include:

- Anti-Crisis Shield for Culture [Tarcza Antykryzysowa dla kultury]: The Polish Film Institute and the Ministry of Culture and National Heritage have allocated funds to rescue the film sector.
- Cultural Support Fund [Fundusz Wsparcia Kultury]: several hundred million PLN were transferred to filmmakers, production companies and cultural institutions, including independent cinemas.
- Subsidies for art-house cinemas and film festivals: thanks to the support of the PISF and subsidy programmes, cinemas survived the lockdown period.

Another significant governmental initiative was the introduction of the 'VoD tax'. Implemented in July 2020, this levy imposes a 1.5% tax on the revenue generated in Poland by VoD services, calculated on the basis of either advertising revenue or user subscriptions, whichever is higher during the settlement period. The resulting funds are directed to the Polish Film Institute, with revenues growing from PLN 8,900,000 in 2020 to PLN 39,700,000 in 2023 (Dąbrowska-Cydzik, 2024). Both international platforms like Netflix and domestic providers, such as Agora and TVP, are subject to this regulation.

4.2.6 Finland

The FFF's COVID-19 responses

In April 2020, FFF received €1,000,000 from the Ministry of Education and Culture "to help relieve the situation of cinemas and film festivals during the restrictions on public gathering caused by the COVID-19 pandemic" (FFF, 2020b). The FFF's annual report for 2020 states that the FFF was able to distribute a total of €2,200,000 to cinemas, distributors and festivals. According to the report, this was "a fraction of the corresponding subsidies in our neighbouring countries" (FFF, 2021b, p. 5). The FFF allocated these additional funds to small and medium-sized cinemas and to any film festivals that had to postpone or cancel their events in the spring of 2020.

In June 2020, the FFF received €5,000,000 from the Ministry of Education and Culture to help revive the film industry after the effects of the COVID-19 pandemic. The funds were intended for producing new films and television series and they were distributed through the FFF's normal application process. Even though more productions were started than in a normal year, it did not help, because there were other additional costs and losses of income because of the pandemic.



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With the above-mentioned funds, the FFF was able to support domestic television series production for the first time ([FFF, 2020b](#); FFF, 2021b).

The global pandemic hampered the international sales of films and slowed down the launching of theatrical distribution all around the world. In response, the FFF launched in autumn 2021 a non-recurring support instrument that aimed to promote the commercial theatrical distribution of Finnish films abroad. The FFF (n.d.) describes the support instrument:

“With the help of targeted project support, we hope that sales companies will be able to make distribution agreements on an even wider scale, that international distributors will commit to Finnish content and invest in local marketing, thus primarily Finnish film producers will benefit from the support. We also consider visionary applications for VoD distribution marketing efforts for well-reasoned reasons. The goal is to promote the international cinema distribution of Finnish films and to increase the international commercial opportunities of films. The goal is to support an even more effective foreign distribution campaign to reach the public.”

The total amount of the distribution support in 2021 was €120,000. This was awarded to ten feature-length fiction films ([FFF, 2022c, p. 23](#)).

During the pandemic years of 2020, 2021 and 2022 there was no dramatic change in the amount of support for international promotion, as seen in Table 1. In fact the amount was bigger than in 2019, probably because of the additional pandemic appropriations. In 2021 (€685,581) and 2022 (€542,412) the total amount was less than in 2020 (€771,245). However, the number of individual aid decisions decreased from 250 in 2019 to 87 in 2021 and then increased to 176 in 2022 ([FFF, 2021a](#); [FFF, 2022a](#); [FFF, 2023a](#)).

Business Finland

Terje Gaustad et al. ([2021, p. 64](#)) state: “For a short time, Business Finland supported SME and mid-cap companies in the planning of new business operations, reorganisation, and replacement of delivery chains, with a regular scheme being made available nationally”. This programme has since been discontinued.

4.2.7 Denmark

Although Denmark was one of the first European countries to shut down part of its activities (Wilson, 2020), and “Denmark experienced the smallest drop” in box office numbers in comparison



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with other film industries in Europe (Niu, 2023, pp.10-11), the pandemic had nonetheless a major impact in Denmark, amounting to a loss of 3.9% of the GDP in 2020 (Marcus et al., 2021, p. 18). A report commissioned by NFTVF and BI Centre for Creative Industries (BI:CCI) analysed the effects of the COVID-19 pandemic on Nordic film and drama series productions. Generally, the audiovisual production sector in the region was very resilient: only 2% of projects were cancelled (Gaustad et al., 2021, p. ii). In the case of Danish projects, “40% reported low impact and only 25% high impact” (Gaustad et al., 2021, p. 21). The specific forms of impact are detailed in the report. Of particular relevance in this context was the limited need to drop international film locations (only applicable to 5% of Danish projects), which can be explained by the fact that “relatively few Danish projects responding to our survey were in pre-production or principal photography when the first wave hit” (Gaustad et al., 2021, p. 23). However, 45% of Danish productions had to work with reduced crews and 20% to change sub-contractors. More broadly, Nordic producers employed “emergency strategies in which they relax priorities in many or all strategic areas to secure project survival” (Gaustad and Booth, 2021).

The report also highlighted the fact that, in comparison with other Nordic countries and film industries, “Danish productions [...] have a relatively high rate of coverage by existing insurance” (Gaustad et al., 2021, p. 29). In terms of the impact of the pandemic on audiences, Danish films captured 27% of cinema goers in Denmark. This is “the largest market share in the Nordics [...]”. Although this represented a slight drop from the previous years’ share of 30%, Denmark has not gone below 20% of Nordic audience share in the last 5 years [...]. Danish admissions are the strongest in the Nordics, and the only country averaging above 3,000,000 ” (Gaustad et al., 2021, p. 57 based on DFI reports from 2016, 2017, 2018, 2019 and 2020). Moreover, according to a more recent DFI report, in 2022, despite the closure of theatres due to COVID-19, 30 feature films, two documentaries and seven minor co-productions were released ([DFI, 2023b, p.6](#)). Moreover, “eight Danish feature films landed on the top 20 theatrical chart of 2022, with A Lucky Man taking third spot” ([DFI, 2023b, p.7](#)).

When asked to comment on the impact of the pandemic in their film industry, a film professional notes that Denmark’s domestic film market rebounded strongly after COVID-19, successfully regaining its audience. However, four years after the pandemic, audience levels have still not fully returned to pre-pandemic numbers: “I mean, right now, we have a problem sort of regaining the audience that we had before COVID [...]. We came back quite strongly right after, but it’s not the same” (Int. Dk4). The same professional states that this issue added complexity to the balance



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faced by the DFI: “We have an issue [with] getting the audience back to the same degree. It's a balance of keep making good quality audience friendly films, but also artistically interesting and challenging films” (Int. Dk4).

However, another interviewee argues that the pandemic also had a positive effect in terms of increased visibility for European cinema: “During Corona, we had very few American films hitting our screens here in Denmark. [...] During the corona year, the post-corona year of 2021, we need to look at the amount of the audience share. I think it was 50% for Denmark. So there was something interesting that happened, because suddenly our films had the chance to be seen” (Int. Dk5). ‘Another Round’ and ‘Riders of Justice’ were two of the Danish films that drew audiences to theatres during the pandemic ([Pham, 2021](#)).

To explain the relatively quick rebound of the Danish film industry after the pandemic, strong public support in Denmark must be acknowledged. The Minister of Culture and a strong majority in the Danish Parliament agreed to provide €12,000,000 (from a surplus of TV licence fee revenues) to support regional film funds, the national broadcaster DR, as well as Danish production companies. The extra funding was split as follows:

- “€8,700,000 to DR to strengthen the national broadcaster’s public-service offerings, including an upcoming effort to commemorate the 300th anniversary of the Danish-Greenlandic connection.
- €2,300,000 to the Danish Film Institute to cover additional costs brought on by the pandemic and to ensure the funding of an undiminished number of Danish films in coming years.
- €400,000 to the regional film funds: West Danish Film Fund and FilmFyn.
- €700,000 to compensate for losses incurred by film and TV production companies on productions made without Danish Film Institute funding.” ([DFI, 2020a](#)).

This strategy of investment is consistent with the broader Danish response to COVID. As has been discussed in detail elsewhere, Danish public campaigns to slow down the spread of the virus were an expression of political crisis management evident in appeals by the prime minister to “civic mindedness” (Almlund et al., 2023, 122) and in the centralisation of authority (Almlund et al., 2023, 125). To mention one example of how this centralised strategy translated into the management of practical challenges faced by the Danish film industry, “Margrete den Første,



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directed by Charlotte Sieling with funding from the Danish Film Institute (DFI), was forced to pause shooting in the Czech Republic, with 23 lost days of filming and predicted losses of nearly €1,000,000 or approximately 10% of its budget (Pham, 2020). The DFI covered these extra costs “in order to make the production viable” (Noonan, 2020, p. 13). At the same time, the DFI also strengthened its support programme for distribution (Noonan, 2020, p. 14).

4.2.8 Sweden

In its response to the COVID-19 pandemic, Sweden was an outlier in the European Union. As has been written elsewhere, “Sweden stood out from other countries, stubbornly refusing lockdowns, school closures, and mask mandates” (Cato, 2023). Nonetheless, Sweden authorities were forced to limit public gatherings and, therefore, to close cinemas at a certain stage. Indeed, “public gathering and events were limited to no more than 50 participants in March 2020. This included theater, cinema, concerts, lectures, religious meetings, demonstrations, sporting events, and amusement parks [...]. In November 2020 this limit was reduced to eight people, then gradually lifted starting in May 2021 until it was fully removed in September 2021” (Cato, 2023).

The first post-pandemic annual report by the Swedish Film Institute was positive, stating at that time that “closed cinemas and cancelled releases do not seem to have had an effect on the consumer’s demand for film content, rather the opposite. During the year, film viewing via VoD increased heavily and digital services made up the majority of film consumption in 2020” (Svenska Filminstitutet, 2021a, p. 5). However, the comparison of data from 2020 and 2023 reveal a decrease in the market share of Swedish film on TV (from 26.8% of the market share of Swedish film at cinemas in 2021 to 17% in 2023) and in the percentage of films with production funding that were directed by a woman (from 64% to 47%). Moreover, the share of total film viewing for VoD has decreased slightly since the pandemic but remains very high, especially in comparison with other European countries (from 67% to 64%; see Svenska Filminstitutet, 2021 and Svenska Filminstitutet, 2023).

A different report, based on interviews with film professionals to assess the pandemic’s impact in the film industry, concluded that “Sweden has the highest proportion of projects experiencing high impact from restrictive measures,” that is, 53% versus 25% in Denmark (Gaustad et al., 2021, p. ii). This can be explained by the fact that “in Sweden drama series made up a significantly larger share of the total production” and that “strict travel restrictions in other countries limit access to foreign locations, cast and crew, and Sweden has more international co-productions than the other



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Nordic countries [...]. Moreover, restrictive measures taken at a corporate level may have transborder effects, like when Odeon Cinemas Group, Europe's largest cinema operator and with the biggest market share in Sweden, decided to close its cinemas in Sweden due to lack of popular new titles rather than Swedish restrictions" ([Gaustad et al., 2021, p. 21](#)).

Although most interviewees did not make specific comments on the impact of the pandemic on the Swedish film industry, those who did are pessimistic. Namely, they think that Swedish cinema has "a problem with audiences at the cinema. We have a market share that has been low since 2019, also before the pandemic" (Int. Sw1). Moreover, the pandemic is understood to have reinforced the lack of balance of the industry's economic model and its increasing dependency on platforms – although it also led to the emergence of new business models. As one interviewee stated, "during the pandemic [...] some platforms approached us saying, 'Oh, we have to give the world a say, we have to show everything for free.' And we're like, 'Hey, it's nice that you have this system, but you can't just show everything for free, you have to have a model, you know.'" But with other festivals we really found out very good models. We could meet halfway to not make the festival die, but to maintain and find ways to stream online' (Int. Sw3).

4.3 The role of VoD platforms

4.3.1 France

The global expansion of VoD platforms - accelerated by the disruption to traditional cinema attendance during the COVID-19 pandemic - has fundamentally reshaped the international film industry. This transformation has elicited diverse responses within the French film sector. While certain institutions perceive VoD platforms as advantageous for the international dissemination of French culture and tourism, stakeholders within the domestic cinema industry often regard them as a threat to the sector's structural stability. In response to these tensions, various strategic measures have been introduced.

Public institutions, notably the French Ministry of Foreign Affairs, have generally adopted a more favourable stance toward VoD platforms, viewing them as strategic instruments for enhancing the global visibility of French cinema. This perspective is particularly relevant for heritage films, which are often able to reach international audiences that would be inaccessible through traditional



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theatrical distribution. Indeed, European films enjoy considerable exposure on VoD platforms, constituting the second most prominently featured group globally and accounting for 11.7% of the films available on such platforms in 2021 ([Unifrance, 2021](#); [CNC, 2024n](#)). French cinema, in particular, is prominently represented, making up 4.6% of the global VoD catalogue, positioning it as the third most represented national cinema and the leading provider of non-English-language content ([Unifrance, 2025](#)).

Additionally, VoD platforms are increasingly recognised as vehicles for promoting France as an international tourist destination. Atout France, the national tourism development agency, has collaborated with platforms such as Netflix to harness the cultural appeal of popular media in enhancing France's global attractiveness. Television series like 'Lupin' and 'Emily in Paris' are frequently cited as emblematic of media-induced tourism and soft power. As one interviewee remarked:

"Emily in Paris, among others, we know very well that there has been an effect on the influx of tourism in Paris but also outside Paris. And Netflix has published a study on how its series strengthen the attractiveness of France [...]: Netflix subscribers are two or three times more likely to want to come to France than others." (Int. Fr5)

A further positive development, as highlighted by distributors, concerns the evolving acquisition strategies of VoD platforms. Rather than prioritising global licensing agreements, platforms increasingly favour territory-by-territory deals. This localisation approach facilitates a more precise alignment between content and regional audience preferences. As a result, platform catalogues vary significantly across national markets, preserving regional exclusivity and ensuring greater cultural specificity (Int. Fr2).

Nevertheless, the integration of VoD platforms into the French film ecosystem has also introduced significant challenges that threaten its structural stability. First and foremost, the rise of streaming services has negatively impacted cinema attendance, thereby reducing the financial returns of theatrical distributors. Moreover, VoD platforms remain largely opaque with respect to audience metrics. While Netflix is often regarded as the most transparent provider, other platforms share minimal viewership data, complicating the accurate evaluation of a film's performance.

In addition to these concerns, there is growing unease regarding the limited visibility afforded to creative talent. Despite sustained lobbying efforts to promote French creators, platform interfaces



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frequently prioritise content typologies over artistic contributors. As one interviewee observed, “[...] platforms are more interested in typology than in talent” (Int. Fr1). This prioritisation of genre and audience segmentation over authorship and nationality diminishes the visibility of directors, cast members and national film industry. Furthermore, platforms have often underrepresented independent cinema, favouring in-house productions or their own co-productions. As a result, distributors seeking to promote auteur-driven films with local cultural resonance increasingly collaborate with smaller, regionally focused platforms. However, these regional/national based platforms, such as Sooner, Filmin, Universciné, Cinobo, despite their cultural significance, lack the financial capacity to compete with global streaming giants. This limits their reach and influence.

Notwithstanding these challenges, several initiatives continue to support a distribution model that is not exclusively reliant on VoD platforms. Unifrance, the primary agency responsible for promoting French cinema abroad, continues to treat streaming services as a secondary market. Its strategic focus remains theatrical distribution, underpinned by the belief that a film’s visibility is significantly enhanced through cinema exhibition before digital release (Int. Fr8).

Similarly, the Institut français has opted not to partner with commercial VoD platforms, instead operating IFcinéma à la carte, a free streaming service designed to improve international access to French cinema (Pellino, 2023). Additionally, the Institut français and Unifrance co-organise MyFrenchFilmFestival (MFFF), a digital francophone film festival held annually in January. This initiative leverages France’s diplomatic and cultural networks to collaborate with smaller local platforms that typically lack the resources for international promotion. As one interviewee suggested, similar efforts at the European level could play an important role in supporting arthouse and festival cinema (Int. Fr6).

At the institutional level, regulatory frameworks have been established to ensure continued investment in national and independent film production. Under the revised AVMSD, VoD platforms are required to reinvest a portion of their revenues into domestic content. France implemented this directive in 2021, mandating that platforms allocate a minimum of 20% of their French revenues to national production (Vlassis, 2017). This regulation has led to a significant increase in ‘Originals’: while these are occasionally criticised for perpetuating cultural clichés, they nonetheless provide vital financial support and foster creative risk-taking. Between 2021 and 2023, investments under this framework surpassed €974,600,000, with Netflix, Amazon Prime Video, and Disney+ accounting for €866,000,000 of that total. Netflix alone financed 66 projects (40.2%), followed by



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Amazon with 53 (32.2%), and Disney+ with 36 (22%). Other platforms, such as Apple TV+, Paramount+, and Max, collectively supported nine additional projects ([Goodfellow, 2024](#); [Boxoffice Pro, 2024](#)).

4.3.2 Spain

Understanding the impact of streaming services in the international promotion of Spanish films is a task that can only be partially accomplished, due to the lack of available data and the early stage of research on the subject. However, it can be said that streaming services have become one of the primary means of ensuring global distribution for films. In Spain, their role is particularly significant, as many services have made substantial investments in local production and Spain's VoD market has grown nearly threefold since 2019 with revenues increasing from €376,000,000 to €1,084,000,000 in 2022 ([PwC, 2024](#)).

The growth that was already evident in 2018 accelerated with the COVID-19 pandemic, and has since been definitively consolidated. Spain has emerged as a key production hub for several major streaming services, notably Amazon Prime and Netflix, and this has had an impact on the country's audiovisual sector. The country has secured a notably higher share of global streaming platforms' investments in original European content (37% in 2021), partly due to its capacity to cater to the Latin American market ([Lacourt, Munch, Radel-Cormann, 2023](#)). This is clearly shown by Spain's ranking as the second-largest exporter of films on SVoD within Europe, second only to France ([Grece, 2022](#)).

The number of Spanish titles appears to be increasing in VoD catalogues outside of Europe as well. Based on recent research by the Ibero-American Observatory of Fiction (OBITEL), which analyses Ibero-American fiction presence on VoD platforms across Ibero-America and the United States, it can be said that the number of Spanish productions in various countries has seen a significant surge, growing from 38 titles in 2019 to 149 in 2020 (Garcia Leiva, 2024). According to Parrot Analytics (2024), Spanish productions have seen a 22% global increase in availability on major streaming platforms between 2021 and 2023, reflecting rapid growth in recent years. Many of these titles (like 'Money Heist' and 'Elite' and, more recently, 'Society of the Snow' or 'Culpa Mía') have become high-performers globally, with over 200 titles in the top 10% of demand for major global streamers. Spain ranks fourth among the top five markets for global revenue generated from non-English content, placing itself as the leading European and Spanish-speaking content market: it follows Japan which tops the list, then South Korea and India; France ranks fifth.



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Parrot Analytics estimates that in total Spain-originated content has generated \$5,100,000,000 in global revenue over the past four years.

Even though there isn't evidence available, the international promotion and projection of Spanish films could also take place through Spanish public service media VoD providers such as CRTVE's [RTVE Play](#) as well as those launched and created in different Autonomous Communities, e.g. [3 Cat](#) (Catalonia), [Nahieran](#) (Basque Country) and [A Carta](#) (Galicia). Nevertheless, except for the latter, available via YouTube, access abroad is usually constrained by distribution rights.

Filmin – a Spanish-based streaming service specialising in independent, arthouse and European cinema (mainly Spanish), is popular in Spain and Portugal. Until 2023 and for eight years, Filmin collaborated with IMCINE (the Mexican Institute of Cinematography) in running FilminLatino, a VoD service focused on independent cinema from Europe and Latin America. The service was renamed Nuestro Cine MX and is now solely controlled by IMCINE, focusing on Mexican productions ([Instituto Mexicano de Cinematografía, n.d.](#)). The Instituto Cervantes reached an agreement in 2020 with a niche Spanish-based streaming service, FlixOlé, so that its world centres can access a catalogue of more than 3,000 Spanish films and series that range from great classics to recent hits ([FlixOlé, 2023](#)).

Despite the advantages that streaming services offer to the audiovisual sector in Spain, they present certain challenges. For example, spillover effects on the Spanish audiovisual industry in general and creators in particular are yet to be assessed, beyond some sectoral reports (e.g. on the impact of tax incentives; Olsberg SPI, 2024) and academic reflections (e.g. García Leiva et al., 2024; García Leiva, 2025).

Many interviewees have highlighted that VoD streaming services certainly represent a key opportunity to promote the Spanish and European film industries on an international scale. Apart from the investment boost these services provide for local productions, the other main advantage is global access, which allows the reach of a wider audience and the exposure they provide to content that might otherwise lack a window of screening after leaving cinemas. However, these opportunities bring their own challenges, as global streaming services make it difficult for non-mainstream European content to gain visibility, especially films produced within Autonomous Communities and in official languages different from Castilian. There is also concern that these services could undermine diversity, determining what is produced and what is not. It was noted



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that some efforts have been made to address these issues with the transposition of the AVMSD, which in Spain mandates that audiovisual content produced, dubbed or subtitled in the official languages of the Autonomous Communities must be promoted (Law 13/2022 on General Audiovisual Communication, Art. 110, 116-119).

Another topic that was brought up by some interviewees in Spain was the fact that these platforms end up owning all intellectual property rights related to the films they commission. These platforms pay well in advance for the rights of the film, and offer a viable way to reach an international audience and remain continuously available worldwide, which can lead to greater recognition, potential co-productions, or festival retrospectives. But this also means that once a sale is made, the producer loses any financial stake in the film's commercial success. This is why it is understood that regulation of these services is crucial, to ensure they are not only actively purchasing and collaborating within the local film industry but also promoting and providing visibility to Spanish and European films. Effective regulatory frameworks are necessary to balance the economic benefits of these platforms with their cultural responsibility to showcase local content and maintain diversity.

4.3.3 Italy

Evaluating the impact of VoD platforms on the international promotion of Italian productions is challenging, due to the insufficient empirical data on this subject matter. On the one hand, the positive impact of VoD platforms on the distribution of Italian productions is undeniable, as they offer a new avenue for dissemination. On the other hand, the scarcity of publicly available data prevents showcasing the quantitative impact of VoD on Italian film promotion.

That said, the study commissioned by the ANICA and published in 2023 ([lapadre. 2023](#)), 'Study on the Italian Audiovisual Industry on International Markets', is one of the few authoritative sources shedding light on the relationship between the international promotion of Italian productions and VoD platforms. The study demonstrates the growth in the international circulation of Italian films between 2017 and 2021, with an increase rate of over 100%. It estimated that, in 2021, approximately 40% of Italian productions were distributed internationally, but only to a few international markets ([lapadre. 2023](#)). The study identified several indicators to explain this market behaviour. The launch of large VoD platforms, such as Netflix and Amazon, is considered instrumental to producing original titles, since foreign investment in the distribution sector, as well as in national productions and co-productions, has a catalysing effect. In this regard, the study



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provided a conservative estimate: 23% of films had international distribution in 2017, growing to 40% in 2021, while also suggesting an increase from 49% in 2020 to 52% in 2021 ([Iapadre, 2023](#)).

The very limited sources of the Italian studies also highlight the difficulties in assessing the impact of the VoD platforms on the internationalisation of the IFI. In this context, Luca Barra and Marta Perrotta, while investigating the correspondence between the genres and their international and digital promotion, emphasise that the digital distribution of Italian productions through VoD platforms is hampered by complications inherent in this process, such as the large libraries/short memory dichotomy of VoD platforms, random cataloguing, and the elimination of films whose licences have expired ([Barra & Perrotta, 2020](#)). Therefore, the authors stress that even if the number of Italian productions available on these platforms were to increase, the increase in the *availability* of Italian movies on digital platforms should not be interpreted as an enhancement of the international *visibility* of these films ([Barra & Perrotta, 2020](#)).

Barra and Perrotta's deductions, regarding the 'availability and visibility' dichotomy that characterises the international distribution of cinematographic content via online platforms, were confirmed and complemented by the interviewees. Int. It3 stated: "There is very limited data on the use of platforms, and the platforms do not release this information. Therefore, we cannot be certain which films are being watched on these platforms, by whom, and to what extent [...]. However, the general perception is that it is an advantage for [Italian] films to be on these platforms, which obviously target international audiences and can, therefore, reach viewers abroad. So it is definitely important. Of course, there is a whole discussion around the visibility of Italian content on these platforms, and this is a topic we hope to address as soon as we have more data" (Int. It3).

Along the same lines, Int. It2 mentioned that public-service VoD platforms, such as Rai Play and Infinity, both of which primarily operate in Italy and a few foreign markets such as Spain, have significantly contributed to the access to and consumption of Italian productions and audiovisual content (Int. It2). Nevertheless, regarding the transparency (like how VoD platforms operate, their viewership stats, audience profiles, and their effect on IFI) issues still make it difficult to fully understand VoD platforms support the global spread and promotion of Italian films (Int. It3).

Besides the above, Int. It4 referred to another factor that has an impact on the limitations to the international distribution of Italian productions. Int. It4 underlined the importance of the Directive



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2010/13/EC, also known as the AVMSD, to have a harmonious Single Market where cultural goods and services can freely flow across the borders within the EU. Yet the interviewee stressed the lack of uniformity in the national transposition of the AVMSD, especially the provisions that are non-mandatory, hence the detrimental effects of a fragmented legal framework on the smooth functioning of the European AV market (Int. It4).

In sum, it can be concluded that the VoD platforms inevitably have an active role in the internationalisation of Italian productions. But other factors, such as the legal fragmentation in the European legal landscape and its implications for the operation of the European AV market, as well as the difficulties in accessing publicly available data, may complicate or even prevent having insight into the interplay of internationalisation of the IFI and the VoD platforms.

4.3.4 Greece

VoD streaming platforms may, under certain conditions, strengthen small national cinemas and national film productions in their promotion and distribution schemes to a wider audience and market internationally. This also applies to Greece.

Greece has transposed the EU Directive on Audiovisual Media Services 2018/1808/EC by Greek L. 4779/2021 with specific requirements for film promotion through VoD media service providers and platforms. According to Art. 17, VoD platforms are obliged to include at least 30% of European audiovisual projects in their catalogs in a prominent position in their programme, including Greek national cinematography. Additionally, VoD media service providers ensure at least a 30% share of European works in their online catalogues (Article 13). However, these provisions do not specify the concrete means of ensuring the prominence of European works in VoD catalogues. Further on, financial obligations are imposed on all media service providers established in Greece (Article 8 of Law 3905/2010, but only on non-linear media service providers targeting Greece (Article 13). Additionally, VoD media service providers targeting Greece are required to contribute 1.5% of their annual revenues earned in Greece, either for funding production of film works (TV films or series), or contribute to the funding of EKOME, now Creative Greece SA (IRIS, 2021).

Collaborations between VoD platforms and state institutions also support film promotion abroad. In 2024, the Greek National Tourist Organisation of the Hellenic Ministry of Tourism signed an MOU with Netflix, VoD service on promoting Greece's landscapes and culture worldwide through joint content production and distribution. The MOU included leveraging the global popularity of Netflix's



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content and hence, jointly producing a promotional video to be used by both parties for the international promotion of Greek film culture and promotional actions (TO VIMA, 2025).

4.3.5 Poland

The Polish VoD market is considered small to medium-sized (Adamczak, 2020), with major international platforms such as Netflix, Max, Disney+ among others. The Polish film market perceives the streaming platform sector as a significant opportunity for growth and innovation. One respondent said: “We are the leader in Central and Eastern Europe in production for platforms” (Int. Pol4). However, it was also noted that Poland’s current leadership in online production may be temporary, warranting further investigation into the long-term sustainability of this position (Int. Pol4).

Leading the market is Netflix, which has been in Poland since 2016 and boasts 10,950,000 users as of January 2024 ([Statista, 2024](#)). Disney+ follows closely with over 3,200,000 users and was the highest-grossing VoD app in the spring of 2024. Other notable players include Max, Amazon Prime Video, Canal+ Online, Apple TV+, and SkyShowtime.

The Polish market is continuously evolving, with ongoing discussions about bundling and cross-selling offers from different providers. For instance, Max is available on the Polish Player.pl platform, while larger companies like Netflix and Disney+ have shown limited interest in bundling their services.

The rise of streaming platforms has fundamentally transformed the film industry’s distribution landscape. As highlighted by Int. Pol8, the Polish film 'Najmro', which focuses on the notorious thief Zdzisław Najmrodzki, achieved significant acclaim by ranking as the third most-watched film on Netflix in the United States. This exemplifies the ability of platforms to facilitate global access to diverse film narratives. Additionally, respondents such as Int. Pol2, Int. Pol3, Int. Pol7, and Int. Pol10 underscore the competitive advantages that new technologies confer upon the Polish film industry. The assertion that “streaming is driven by internet culture” reinforces the importance of non-linear distribution channels, which are likely to shape future viewing habits and industry dynamics. Thus, the intersection of technology and film distribution presents substantial opportunities for the sector’s growth and innovation.

Technological advancements have significantly reshaped film consumption in Poland, fostering new modes of audience engagement. Respondents Int. Pol3 and Int. Pol7 assert that the



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proliferation of mobile devices has facilitated unprecedented access to audiovisual content. Int. Pol3 explains that, over the past two decades, the accessibility of films has evolved markedly, with devices capable of transmitting visual media becoming ubiquitous. This paradigm shift has caused a reconfiguration of viewer profiles and consumption patterns. Moreover, Int. Pol7 stresses the need to understand the diverse ways that audiences engage with films, recognising that, despite enhanced access, traditional cinema retains a unique experiential value. The communal aspect of cinema, audiences gathering for a prolonged viewing experience, stands in stark contrast to the fragmented nature of home viewing, underscoring the continued relevance of traditional film venues.

Before the COVID-19 pandemic, the Polish VoD market was already well-developed within Central and Eastern Europe, reaching a saturation level of about 10% (Adamczak, 2020). This position is comparable to markets such as Italy, France, and Spain, and surpasses regional competitors like Bulgaria and the Czech Republic. However, the VoD market remains highly competitive, posing challenges for providers lacking support from TV broadcasters (e.g., Polsat) or substantial global marketing budgets ([Kot, 2024](#)).

The updated national regulations and AVMSD revision have significantly changed the media services landscape, establishing new liability rules for VoD providers and video-sharing platforms. In August 2021, the President of Poland signed an amendment to the Broadcasting Act and the Cinematography Act to implement Directive 2018/1808 of the European Parliament and the Council (EU). The amendment introduced operating video-sharing platform regulations and established a list of on-demand audiovisual media services ([Dziennik Ustaw, 2021](#)). Following 2021 amendments, the Broadcasting Act covers both on-demand audiovisual media services and video-sharing platforms.

Recent changes to national regulations have established a mandatory registry for on-demand audiovisual media service providers, overseen by the Chairman of the National Broadcasting Council (Krajowa Rada Radiofonii i Telewizji, KRRiT). All VoD providers must register their services with KRRiT 14 days before launch or by 1 February 2022, for those already in operation as of November 2021. The amended Broadcasting Act aims to increase consumer transparency by clarifying the identity of service providers. Previously, available information did not allow consumers to identify the service provider's actual (beneficial) owner: this obscured who had decision-making authority over the service's operations and content distribution.



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KRRiT must report to the European Commission on compliance with European work obligations of media service providers. A new requirement mandates that VoD providers ensure at least 30% of their catalogue consists of European works, prominently displayed with clear identification and searchable options. Article 13 of the revised AVMSD allows Member States to require media service providers in their jurisdiction, and those targeting their audiences from other Member States, to financially contribute to European works. In Poland, this is regulated under Article 19 of the Cinematography Act.

When discussing streaming platform policies, the Digital Single Market Copyright Directive (DSM) must be mentioned. The EU's 2019 DSM Directive requires Member States to ensure creators are paid for making their works available online. Poland was expected to implement this legislation by June 2021, but the process was delayed. As a result, Polish creators did not receive royalties from streaming platforms, which led to estimated losses of PLN 30 to 40,000,000 annually. In April 2024, the government passed a bill guaranteeing Polish creators royalties from streaming platforms. Prime Minister Donald Tusk emphasised that the Polish state supports creators, and the new law aims to enforce remuneration from streaming services in line with European law ([Money.pl](https://money.pl), 2024).

The ongoing discourse on Poland's VoD platform policy reveals a consensus among some respondents regarding its shortcomings (Int. Pol7, Int. Pol10). Central to this critique is the absence of tailored solutions, particularly concerning recent royalty discussions. This debate raises questions about the ability of existing legal frameworks, both European and Polish, to protect creators' and producers' interests while enhancing access to audiovisual works (Int. Pol7). Moreover, the need for concrete organisational practices is emphasised, with references to successful models implemented by major UK broadcasters like the BBC, which ensures timely content availability for viewers (Int. Pol2). In contrast, emerging technologies are recognised as pivotal in establishing a participatory and democratic film system within the VoD landscape, facilitating broader engagement in financing decision-making processes (Int. Pol7).

4.3.6 Finland

The general thinking among the interviewed representatives of the FFF seemed to be that the EU has negotiation power regarding European content on VoDs; but this power is no longer as effective as it used to be. The effects of streaming services were evaluated in different ways. One interviewee pointed out that there is a fair number of European films on streaming services but “we



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don't have information about what people watch on streaming services and if it has affected the visibility [of European films]. That we don't know at the moment" (Int. Fi9).

For the same reason, respondents found it difficult to assess the extent to which streaming services have benefited Finnish films. Indeed, there are not yet enough statistics on what people watch on different streaming platforms, especially on smaller platforms. One interviewee was slightly disappointed that average viewers have not started to look for more "obscure" content on streaming services and that perhaps such content remains the interest of film enthusiasts (Int. Fi4).

The interviewees in Finland argued that the various VoD services increased the competitiveness of European cinema at least for a short period, by improving distribution possibilities (Int. Fi8, Int. Fi9). One interviewee noted that, thanks to the AVMSD and digitalisation, European cinema should have benefited from the boom of streaming services. The services had an obligation to invest in European cinema and international streamers had an interest in attracting audiences from different European countries. This required national content in the form of European films. However, the interest of the streamers soon shifted to original content, i.e. TV series, according to the interviewee. At first, there was a boom in European TV series, but now it has come to an end. Investment has decreased and this happened first in content from small European cultures (Int. Fi8).

"It seems that when resources decrease or when there is less investment, the quotas set by the [AVMSD] no longer work in a way that would guarantee new European content and investment. Instead, the supply becomes narrower. Investment in the major languages continues, and the number of productions will probably even decrease there. In the marketing of streamers, non-European, i.e. North American content now seems to be at the top of the list. And it is not the breadth of offering that is being sought, but a few top works, which are almost always American productions. If financing develops in such a way that streamers are less and less likely to fully finance productions, but instead strive to partially finance and buy finished productions, this means that the focus on American offerings will be even greater in the future" (Int. Fi8).

One respondent believed that VoDs have affected cinema audiences, so that people go to the cinema to see big films that they know will not be available on VoD shortly. According to the interviewee: "Perhaps European cinema rarely has that kind of competitive advantage" (Int. Fi8). A



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representative of APFI estimated that Finnish TV series have gained more exposure through streaming services than films, citing the examples of ‘Deadwind’ (Karppi, 2018-2021) and ‘Sorjonen’ (Bordertown, 2016-2020) which have gained viewers in Latin America thanks to Netflix (Int. Fi11). When asked whether the recommendation systems bring additional challenges to the promotion of the EFI, the interviewees at the Film Foundation replied that films with a smaller target audience may be excluded from the recommendations. Netflix’s first-ever original Finnish film, ‘Little Siberia’ (Pikku Siperia, 2025) directed by Dome Karukoski, had its premiere in March 2025 ([Kinnunen, 2025](#)).

The APFI’s representative stressed that it was important for the competitiveness of the Finnish film industry that Article 13(2) of the AVMSD be finally implemented in Finland and referred to the report, ‘Finnish model for an investment obligation for on-demand programme services’, commissioned by the Ministry of Education and Culture (Int. Fi10). The report assesses “the economic impacts of introducing an investment or payment obligation for on-demand programme services and different implementation options (a direct investment obligation, a fund model, and a hybrid model of investment obligation and fund) on the domestic audiovisual market and the sector’s growth potential” ([Kemppinen, 2024, p. 5](#)).

According to the report, the aims of the investment obligation include strengthening of the availability of audiovisual productions from small language and culture areas, increasing the competitiveness of the sector by improving quality, promoting the internationalisation of the domestic audiovisual sector, and improving the possibility of domestic actors to make use of their IP rights. The predicted effects include: the amount of international actors’ financial investment in domestic content would increase, an increase of €9,000,000 in the public funding of the audiovisual industry, and the domestic audiovisual production business would grow by around €20,000,000 to €25,000,000 ([Kemppinen, 2024, p. 41](#)). As the respondent of APFI pointed out, this issue is included in the programme of the current government (Int. Fi11).

4.3.7 Denmark

The increasing market power of international streaming platforms disrupts the economy of film, lowering the revenues of producers and the number of independent production companies in Denmark (Int. Dk8) and presents several challenges for the Danish film industry. Although interviewees look positively at the contribution of streamers to the market, such as their financial investment into the sector and their questioning of the centrality of existing players – “a



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broadcaster like DR is huge and they kind of have a monopoly” (Int. Dk1) –, they also raise questions about the contribution of streamers to cultural diversity at the European scale, noting, for example, that “in many territories the Netflix strategy changed from local-global to local for locals” (Int. Dk8). This is accompanied by increasing investment by streamers in “the lowest common denominator” with the consequence that they would “never do an art film” (Int. Dk8). Other interviewees noted that platforms tend to exclude arthouse films from renowned Danish directors from the top of algorithm recommendations due to expectations of limited audience demand. One interviewee highlighted this issue: “The next Another Round... why should they have the incentive to promote that? They would put it in the lowest category and lowest algorithm and no one would ever find it” (Int. Dk3). This results in lower discoverability of TV series and co-productions in consumers’ preferred platforms.

The language barrier further exacerbates this challenge: “Of course it’s a bigger interest of Netflix to do a Spanish-speaking film than a Danish-language-speaking film, because the audience is too small” (Int. Dk8). Moreover, the increasing weight of VoD platforms in the Danish market has led to a decline of transnational promotion efforts for Danish TV series, which are traditionally led by public service broadcasters. One interviewee illustrated this point: “When you do a Danish TV series for Netflix, even though it’s worldwide, they do promotion in Denmark. They do nothing outside of Denmark. So Danish TV series in general kind of die when they go abroad” (Int. Dk2). Other interviewees confirmed this point (Int. Dk8).

Moreover, interviewees believe that these platforms select films mostly according to market-oriented criteria. One respondent explained: “They do not work according to our logic. They work along the logics of the stock exchange, mostly in New York. So, we need to be aware of this and we should not think that small countries by themselves can fight that” (Int. Dk5). Additionally, unlike public broadcasters, “streaming platforms [...] can be very ideologically (driven) [...] they can choose to drive a certain agenda and choose films that then aren’t really editorially sound” (Int. Dk6). Finally, when a project is purchased by a streamer, this can change the dynamic on set, since streamers often have the last word rather than its director or the producers (Int. Dk7).

In particular, interviewees highlighted the question of rights – and buyout contracts, which subsequently lead to the absence of profit sharing when productions that become successful (Int. Dk7) – as dangerous for the industry. Competing with international streaming platforms can be challenging for a small country such as Denmark, whose lively industry depends on independent



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producers. However, Denmark's strong industry unions organised to protect producers' rights in agreements with international streaming platforms (see summary of key policies below). One interviewee summarised the broader significance of the problem regarding rights, that is, the precarious balance and ecosystem that they enable, with the following words: "everyone forgets that the streamers, they take the talent when the talent is educated, but they didn't pay for their education. They didn't pay for development risk and it's extremely difficult for us. [...]. In Europe, it is a balance between support and the markets and investment" (Int. Dk2). Another stated that "the whole idea with reserving rights [...] the idea is that you take a risk. In the end, it's a lottery ticket. But if you are negotiating with Netflix or something really huge, then in the end you actually give in and you get the rebated fee, but you never get the right reservation. That's a huge problem" (Int. Dk3).

While these new policies support the development of Danish productions, they have also prompted some streaming services to reconsider their presence in Denmark. As one industry professional noted: "We have our union, the producers unions here, who are constantly in. They have been having a fight with ViaPlay and TV2 as well [...]. But they are taking care of our rights and they are good negotiators. Maybe a little bit too good at times because that's also why some of the streamers suddenly said 'No, we're not using Denmark anymore'" (Int. Dk6). The danger of a race to the bottom was also recognised by another interviewee: "We have a country where rights are crucial [...]. But then they'll probably come running for the Netherlands and other countries where the production companies are just production services" (Int. Dk3).

This highlights the discrepancies and lack of transparency in contracts that are signed with streamers. Another issue that interviewees see as problematic considering the issue of rights is the ability of streamers to access public funding in some European countries: 'Netflix [...] in Sweden [...] accepted saying "we [...] buy everything [...]. We take everything you produced for us and then you're out." But then they found out, they have to finance everything. Then they found out, okay, maybe [it's better to have] a combination between certain rights retained by the producer and then they can access public funding, which for me is not good' (Int. Dk2).

In any case, all interviewees in Denmark agree with the need for more equal and regulated relations between streamers and the Danish film industry, and several state their reservations about Denmark being able to address this issue on its own: "We should not think that small countries by themselves can fight that. I think it would help to work together" (Int. Dk5). However,



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interviewees in Denmark disagree regarding the idea of a potential European VoD provider. Some state that such a solution could support the promotion of European film (e.g. Int. Dk6) while others think that it wouldn't address the fundamental problem of discoverability in international streaming platforms (Int. Dk5).

Finally, it should be noted that both Danish public television stations (the Danish Broadcasting Corporation, DR, which was founded in 1925 and has received public funding since then, currently providing radio, television, and web services; and TV 2, a commercial but state-owned operator established in 1988, which provides television and web services) have their own VoD platforms. With the latter, these broadcasters aim to compete with international streaming platforms while fulfilling their public-service obligations. In particular, DR must deliver “Danish-language drama series, music, cultural content, content for children and young people, sports, content from all regions of the Danish nation, Danish film, and of course news” (Cores-Sarria, Andersen and Heiselberg, 2024, p. 8), whereas “TV 2 also has a list of public-service obligations that include sports, Danish-language drama series, cultural content, content for children and young people, Danish films, and news (Danish Ministry of Culture, 2018 cited in Cores-Sarria, Andersen and Heiselberg, 2024, p. 9). However, as has been noted elsewhere, it is not detailed in law how obligations are to be transposed into these providers' VoD services. This has led to a situation wherein these platforms “embrace reality content in a strategy to offer ‘Danish content’ that stands out from what their foreign competitors offer” (Andersen, 2024), even though “the formats behind the content might very well still have been imported” (Andersen, 2024, p. 13).

From a policy perspective, the Danish film industry has a special relationship with VoD platforms. In 2023, under pressure from the unions, a streaming levy (Cultural Contribution Act, discussed in 2022) was passed by the Danish Parliament in December 2023 (see [Folketinget, 2024](#) for the Act as enacted). The levy, effective from 1 January 2025, requires on-demand streaming service providers to contribute 2% of their Danish revenue as a basic rate. Additionally, if a streaming platform invests less than 5% of its Danish earnings in local content, it incurs an extra 3% surcharge, bringing the total fee to 5%.

That is, the Act also establishes “an obligation for streaming services to invest in “new” Danish content. Investments in new Danish content include all types of investments in production and co-production of new Danish content, which may include direct investments, e.g. in the form of production, co-production, and acquisition of rights to films, series, or documentaries, regardless of



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genre. However, it is a requirement that the content is “new”, i.e. not yet finished productions. An investment will be considered to have been made in Danish content when 75% of the production material for European-produced films, series or documentaries is in Danish” ([Bech Bruun, 2024](#)).

As was mentioned previously, the current Film Agreement states that “the Cultural Contribution from streaming platforms is expected to provide the industry with approx. 98 million DKK per year from 2025” ([DFI, 2023a](#)). This figure has been detailed by the Nordisk Film and TV Fond: “the bulk of the net proceeds from the streaming levy, 80%, will be earmarked for Danish fiction and non-fiction films, with the remaining 20% going to TV series and TV documentaries via the Public Service Fund. It is expected that the combined levy and investment obligation will provide DKK 100,000,000 (€13,400,000) in Danish content [...]. So far, 17 streamers have signed up for the Danish scheme, including Amazon Prime Video, Google, Netflix International, TV 2 Denmark, and Viaplay Group, according to the Danish agency SLKS. According to the Danish scheme, streamers must report the total amount of relevant turnover as well as the total amount of investments. The statements must be accompanied by an auditor’s certification. Sports and news programmes are exempt, as well as income from linear TV operations.” ([Nordisk Film & TV Fond, 2025a](#)). However, some have argued that this cultural levy could clash with the OECD’s new global system for taxing digital services: “Denmark, for example, already announced that the digital levy [...] is not conditional if Pillar One materialises or not (Olivio, 2022)” (Buriak, 2023, p. 386).

In parallel, after 11 months of negotiations, which put the sector virtually on hold, a deal with Netflix was reached at the end of 2022 ([Nordisk Film & Tv Fond, 2022](#)). The deal was originally supposed to last until late 2024 but it was extended to June 2025. “With the agreement, Netflix commits to pay initial and ongoing rights remuneration to filmmakers both in front of and behind the camera on Danish Netflix productions of films” ([Danish News, 2023](#)). As has been written elsewhere, “Netflix and Create Denmark – and the seven creative workers’ unions it represents – have reached an agreement that “includes a guaranteed initial rights payment upon launch on the Netflix service, followed by additional remuneration based on the success of a show” ([Women in Film and Television Ireland, 2022](#)). After this initial deal with Netflix, several parallel agreements were signed with other platforms operating in Denmark.

This established rights remuneration and an extra remuneration if the film is highly successful, based on shared data. At the time of interviews with film professionals (October 2024), the first calculations and data from streamers were being assessed and interviewees were hopeful but not



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confident that a significant pot of money would reach them after this process (Int. Dk8). Moreover, they noted that this model was unlikely to function exclusively at the national level because streamers might “move out” elsewhere (Int. Dk8). In any case, they recognised the need for an EU discussion around rights to counteract the weight of international streamers in the European market.

At the writing of this report, no news regarding its further extension are yet public with the exception of a new four-year rights agreement for scripted series with Create Denmark, signed in 2025, which will last until May 2029. “A rights agreement for Danish feature films is not yet in place but the parties are working on one” ([C21Media](#)).

In November 2024, Denmark also launched a production rebate ([Deadline, 2024](#)) following intense pressure by the industry, which stated that the absence of such a system was leading international production companies and streamers to choose the competition when filming (Nordisk film, 2024). “The Danish incentive, which will kick off in 2026, will tap into an annual envelope of DKK 125,000,000 (\$17,500,000), twice the amount allocated to foreign productions in Sweden and significantly larger than in Norway. The rebate on eligible expenses is expected to be 25%” ([Variety, 2024](#)). The amount allocated per year will be split between “DKK 100 million (approx. €13.4 million) for series, films and documentaries and a pool of DKK 25 million (€3.35 million) for animation” ([DFI, 2025](#)).

As a result of this, the Danes now have: a levy with an investment obligation, guaranteed rights remuneration, and a production rebate ([see Annex V](#)). However, it remains to be seen if the most recent policy measure is enough to bring streamers fully back to Denmark. Indeed, several interviewees note that the number of original productions dropped and hasn’t been the same since late 2022 (Int. Dk1, Int. Dk2, Int. Dk3, Int. DK5, Int.Dk9).

4.3.8 Sweden

According to Swedish film professionals, streaming platforms have the potential to increase the visibility of Swedish films and cultural workers worldwide. For example, when asked about the advantages of VoD platforms for promoting Swedish and European films, one interviewee stated: “If you do something for Netflix, it’s immediate. It’s an international product, which is fantastic. And we know that. That [means] that talents are exported overseas” (Int. Sw16). Moreover, interviewees recognise that streaming platforms have significant financial resources, allowing them



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to attract specialised workers (Int. Sw9). This indirectly enables them to expand the global reach of Swedish films.

However, while streaming platforms offer opportunities, interviewees also recognise the existence of challenges in this relationship and the fact that traditional markets such as local cinemas and TV channels often receive limited (if any) direct benefits from the existence of Swedish films fully funded by or bought by streamers. As a respondent highlights, hinting at the emerging power relationship between streamers and other film stakeholders, “I think that we should stand up for the movie theatre because [doing so] does not exclude the movie being screened at a streamer or a public broadcaster, but [they have] to be down the line” (Int. Sw14). To guarantee that the entire ecosystem can benefit from distribution opportunities, the Swedish Film Institute prioritises funding films with traditional theatrical release windows. As one interviewee stated, and as mentioned earlier, “we will, from now on, prioritise films that have a normal, old-fashioned window so that the whole ecosystem can live from the film, can exploit the film. Which doesn’t mean that we don’t let the streamers [...] buy their share for a window, but we don’t want them to buy 14 years and kind of just crush the industry” (Int. Sw9). This stance is also implicitly evident in the SFI’s decision to support a scheme to reinforce the dissemination of Swedish films on streaming platforms.

Additionally, in Sweden streaming platforms tend to acquire full rights through buyout contracts, in which producers lose both remuneration and moral rights. One interviewee noted: “If I make a film for Netflix, Netflix has all the rights for eternity, I would say, and they can make what they want [...]. I don’t have anything to say. They could dub it in certain languages [...]. It’s a kind of a black box. And to me it’s so important when I make a film, I make a statement in a way” (Int. Sw10). The SFI’s decision to only fund films whose producers keep their rights (Int. Sw9) acknowledges this problem. Another important challenge is the instability of the streaming market in Sweden, emphasising the temporary nature of investment by streamers.

Like an increasing number of EU Member States, Sweden requires streaming platforms to include a quota guaranteeing that at least 30% of European works are included in their catalogues and that they are prominent therein (Jansson & Van Belle, 2024). However, “the Swedish model relies on self-reporting (Interview Broadcasting Authority). Furthermore, as indicated by the wording in the government bill, “the application of the 30 per cent quota is not considered very important in the Swedish context” (Jansson & Van Belle, 2024, p. 287). While this regulation indirectly increases support for domestic content, and even though “no steps have been taken in Sweden



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concerning the possibility of making streaming platforms contribute economically to domestic productions” (Jansson & Van Belle, 2024, p. 287), Swedish film professionals nonetheless advocate for stronger investment commitments from the streamers and for more data transparency on how films perform. As one interviewee states: “You know, this agreement that our union has, where we can have a look at the figures twice a year, and it's secret... We are not allowed to say anything about it. But you can't see everything. You have to be a member of this organisation. And to be a member there, you have to pay a lot of money. So I think transparency is a good thing. I think Europe will have to step up, because I think it's quite a vulnerable situation” (Int. Sw10).

Specifically, Swedish film professionals see a growing opportunity for VoD platforms to contribute to public funding through the implementation of a levy similar to what is at play in Denmark, which would require streaming services to allocate a portion of their revenue to national film productions. As one interviewee states, “the streamer should pay out a share of what they earn of it [...]. We have been trying to get the politicians to understand that this money means a lot. Denmark has it now [...]. And they receive a lot of money out of it. They go to film production and TV production [...]. And we said, but all the other countries, France, Denmark, Spain, Italy... all the countries have it. Even Poland” (Int. Sw10). Another interviewee emphasises the potential importance of such contributions for the Swedish film ecology and, in particular, to supporting independent co-productions: “Since we're looking at smaller budgets for production support, for our promotional work and for a whole support system, then we have to get extra money somewhere else and we can't print money. So why aren't the streaming platforms paying anything?” (Int. Sw15). That is, support for the levy is justified by the need to sustain Swedish filmmaking. However, interviewees disagree when asked about the possibility of a public European streaming platform.

It should also be mentioned that the Swedish film market is supported by public streaming platforms run by Swedish libraries Viddla and Cineasterna. The former was created in 2017 and it showcases over 2000 Swedish, Nordic, European and international films, SF's film catalogue, classics such as Ingmar Bergman's work, adapted books, Oscar winners, documentaries, and arthouse films, and films for children ([Viddla, n.d.](#)) whereas the latter is a mobile streaming service that is free of charge for library users, available also in Finland ([Cineasterna, n.d.](#)). These initiatives represent an alternative model to make Swedish films accessible and widely available outside of commercial streaming platforms.



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In terms of policy, since 2022 Sweden has given a 25% production discount focused on audiovisual works to companies whose main activity lies in the production or post-production of audiovisual works (feature films, documentary films, drama series or documentary series; [see Annex VI](#)), whether partly or fully made in Sweden. As has been explained elsewhere, companies “can apply for support for part of the cost of a production and then receive it in the form of a reimbursement after the costs have been incurred” ([Film i Väst, n.d.](#)). The allocated annual budget is SEK 100,000,000. To be eligible, the following requirements must be met:

- “the production takes place in whole or in part in Sweden,
- the total budget of the production amounts to at least SEK 30,000,000 for a feature film, at least SEK 10,000,000 for a documentary film, at least SEK 10,000,000 per episode for a drama series, or at least SEK 5,000,000 per episode for a documentary series,
- the support-eligible production costs amount to at least SEK 4,000,000,
- the production’s financing is confirmed for the part for which support is not sought,
- the production is classified as a cultural product based on a list of cultural criteria drawn up in advance by the Swedish Agency for Economic and Regional Growth” ([Film i Väst, n.d.a](#)).

Moreover, since 2019, foreign filmmakers working on features, documentaries or TV series in Sweden have been able to qualify for a 30% tax rebate of up to €565,000 per year ([Fixersweden, n.d.](#)). The scheme is also administered by Film i Väst. It has several conditions, including shooting or doing post-production work in Sweden, collaborating with local production companies, and hiring a local crew. Moreover, films with the potential to enter international film festivals are more likely to be awarded the rebate. Unlike in Denmark, there are currently no levies placed on streaming platforms in Sweden.

In March 2025, reports emerged stating that the government recognises the difficult situation faced by the Swedish film industry, that is, increased competition in theatres and in film production brought by streamers, and is therefore considering new measures to support it. Such measures include a potential new film fund to add capital into the industry and a lower VAT tax on cinema tickets (currently at 25% after being raised in 2017 from 6%) ([NordiskFilm & TV Fond, 2025](#)).



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Conclusion

This report provides a comprehensive mapping of the institutional architecture that underpins the international promotion of national film industries, with a particular emphasis on key public policies, support mechanisms and incentive structures. It undertakes a comparative analysis of institutional practices across eight EU Member States, Denmark, Finland, France, Sweden, Poland, Italy, Spain and Greece, offering critical insights into the ways in which these countries support the international visibility and competitiveness of their respective film sectors.

The analysis focuses on the mechanisms that facilitate the circulation and recognition of national film industries within the internal market of the EU. It also extends to the strategies employed to enhance the global footprint of European cinema beyond the Union's borders. A core objective of this report is to build upon and update the findings presented in the 2006 study by the EAO - CoE on public support for the international promotion of European films ([Hoefert de Turégano, 2006](#)). In light of evolving policy frameworks, technological transformations, and shifts in global market dynamics, this report re-examines the role of public institutions in fostering international outreach, with a view to identifying practices, gaps, and opportunities.

The analysis of the eight countries has confirmed the assumption that, in parallel to the development of EU competences in the audiovisual/film sector, the Member States remain the main players in the international promotion of their respective film industries. The film diplomacy of the Member States is achieved through various public institutional mechanisms; through specific support systems anchored in their cultural economic and diplomatic strategies; and through collaboration between the Member States on a bilateral or regional basis, in parallel with the European frameworks.

A common structural feature across the countries examined in this report is the organisation of their institutional frameworks for international film promotion around a central coordinating body, typically situated within the Ministry of Culture, in conjunction with a national film institute or equivalent entity. However, the degree of centralisation in policy implementation varies across national contexts. At one end of the spectrum lies Italy, where international film promotion is highly centralised under the direct authority of the Ministry of Culture; and Denmark, in which the international circulation, promotion and success of Danish films cannot be dissociated from the country's existing holistic approach to film funding across the supply chain.



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By contrast, countries such as France, where the various components of foreign film policy are shared, adopt a highly collaborative approach, with responsibilities distributed among multiple institutional actors. These actors include the Ministry of Culture, the CNC, the Ministry of Foreign Affairs, and the French Institute. Moreover, the institutional architecture is further characterised by collaborative arrangements with semi-autonomous public bodies or professional associations, which assume responsibility for specific dimensions of international film promotion. A prominent example of these arrangements can be seen in France, where the association Unifrance plays a central role in the international commercial promotion of French cinema.

Other models are observed in Italy and Greece. Heritage institutions, such as the Cineteca Nazionale and the Greek Film Archive, are not only custodians of national film legacies but also actively engaged in promoting these works abroad. These partnerships underscore the hybrid nature of governance in the field of film diplomacy, where public, semi-public and associative actors collaborate to support national film industries across EU Member States and abroad.

The role of sub-state entities in film promotion policy also varies across the countries studied, depending on the constitutional and administrative structures of each state. In Spain, the Autonomous Communities exercise significant authority and have developed independent strategies for supporting film production and distribution, reflecting the country's broader model of decentralised governance. A similar, albeit more limited, degree of regional autonomy is observed in Sweden, where sub-state institutions are granted a degree of latitude in shaping regional audiovisual/film policies. Although Denmark also has sub-state level funds, they are not perceived by professionals as holding a key role in explaining the international promotion and competitiveness of Danish films.

In contrast, the involvement of regional bodies in Italy, France and Greece is primarily oriented toward attracting film shoots to specific territories, thereby aligning more closely with regional economic development objectives and place-based branding strategies. In Finland, international film promotion is predominantly managed at the national level by the FFF. However, there is occasional coordination with regional and local partners, particularly in the context of specific cultural events or targeted initiatives. Poland, however, maintains a strongly centralised model in which the Polish Film Institute is the primary institutional actor. Nonetheless, the country's regional film festivals and local initiatives contribute to the broader promotional ecosystem. It is important to note that this occurs within a context of increasing political influence over cultural institutions,



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which has shaped the operational autonomy of various stakeholders involved in film policy implementation.

Furthermore, the international promotion of national film industries engages a diverse set of actors, which meets various configurations across EU Member States. In some cases, such as Poland and Finland, promotional strategies are predominantly administered through public institutions. This reflects a centralised and state-led approach. In Finland, however, the idea was put forward that the promotion of films should also be decentralised to international sales companies, where the film market is perhaps even better known.

In comparison, other national models are characterised by a more pronounced involvement of private and associative sectors. France stands out in particular, having an innovative institutional arrangement that combines substantial public funding with joint governance mechanisms, exemplified by the CNC, and the operational role of specialised associative entities, most notably Unifrance, which is dedicated to the international commercial promotion of French cinema. In Spain and Italy, the private sector also assumes a significant function in the international dissemination of national cinema, particularly through the organisation of film festivals and the activation of professional networks that contribute to enhancing the global visibility of domestic film productions.

In addition, the multiplicity of actors and levels of intervention involved in the international promotion of national film industries gives rise to significant variations in the degree of policy coordination across countries. In certain contexts, such as France and Denmark, the governance of international film promotion appears relatively cohesive. This governance is notable for a clear strategic orientation and effective inter-institutional coordination. By contrast, other countries, including Italy and Greece, have a less articulated institutional landscape. Their multiple bodies operate in parallel, often without a clearly unified policy framework. In Poland, concerns have been raised by industry stakeholders regarding the uneven distribution of public funding. Filmmakers have observed that subsidies tend to be concentrated in major urban centres such as Warsaw, Krakow and Gdansk, cities that already benefit from established cultural infrastructures and dedicated municipal budgets. In Spain, while the involvement of numerous actors in international promotional efforts has raised concerns about coordination, industry stakeholders noted that efforts are generally complementary and aligned toward common objectives. Nevertheless, the need for a comprehensive strategy seems clear - one that combines general solutions to shared



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challenges with targeted measures for specific needs, balancing both the tangible and intangible aspects of international reach.

National film industries are mobilised in varying ways across different countries, reflecting distinct strategic priorities in the international film promotion. For some, such as France, the film industry is an integrative part of France's cultural diplomacy, aimed at shaping contemporary international relations and enhancing soft power. Furthermore, France differs from its European counterparts, thanks to a structured institutional system that relies on the complementary functions of two key entities: the diplomatic efforts of audiovisual attachés and the sector-specific expertise of Unifrance. This dual framework enhances the strategic reach of French cinema abroad. It combines cultural diplomacy with targeted promotional capabilities, thereby offering France a comparatively greater capacity for international influence and visibility.

Other countries, like Greece, integrate film promotion into broader strategies to stimulate tourism and visibility. Italy adopts a predominantly economic and industrial approach, emphasising the sector's contribution to creative industries and regional development. The Nordic countries, notably Sweden, Denmark and Finland, more systematically than other countries align their film policies with values consistent with sustainable development goals, including social inclusion, pluralism and participatory engagement. Furthermore, the priorities of film promotion often mirror broader cultural and ideological orientations. In Poland, the increasing politicisation of cultural institutions has resulted in a shift of support towards film productions that align with prevailing governmental narratives.

More specifically, each country under study has adopted a distinct strategic orientation, reflecting its specific policy priorities, institutional and financial capacities. While bilateral and plurilateral collaboration, through co-productions, exchanges and joint initiatives, is common, national approaches are diverse. Each state channels its efforts towards particular geographical regions or thematic priorities, leading to a dynamic landscape of promotional practices across Europe.

France adopts a strategy aimed at consolidating its position as a global film power, advancing both cultural and economic objectives. This approach is closely aligned with the country's broader cultural diplomacy agenda and it reflects a deep-rooted commitment to the promotion of cultural diversity, frequently articulated in opposition to the perceived homogenising tendencies of Hollywood/US-based VoD platforms' activities (Elseasser, 2005). France's international film



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promotion strategy is further reinforced by a comprehensive framework of bilateral co-production agreements, targeted support schemes and multilateral aids, i.e. with the OIF, operating both within the EU and abroad. These mechanisms facilitate cross-border collaboration while enhancing the visibility and circulation of French, and European, audiovisual works. This contributes to the country's influence in international cultural and economic arenas. Spain's approach, by contrast, is both ambitious and complex - not only because there is a multilevel structure of policies and institutions dealing with the promotion of the Spanish film industry but also because support is multi-dimensional: it usually combines a range of objectives not always easy to fulfill and reconcile; notably economic, diplomatic, cultural and linguistic. Spain also has a strong strategic orientation towards the Americas, particularly Latin America, and Europe, although there is increasing interest in strengthening ties with Asia as well. Italy, currently undergoing reform in the wake of the 2016 Cinema Law, has yet to develop a fully structured international promotion strategy. While Italy participates in co-production agreements and offers financial incentives, such as tax credits, it lacks a comprehensive set of dedicated promotional instruments. The country's efforts are focused on facilitating professional access to information and supporting production through fiscal tools. Greece is in a comparable phase of policy development. Recent legislative reforms introduced in 2024 aim to strengthen the national film policy framework. However, a formal international promotion strategy has not yet been institutionalised. Instead, the country relies primarily on indirect promotional mechanisms, such as film education, professional training and media literacy initiatives, alongside cash rebates and other fiscal incentives. Poland employs a more diversified approach, encompassing cash rebates, international distribution campaigns, and cultural cooperation. Nevertheless, access to these mechanisms is uneven, with large cities such as Warsaw, Krakow and Gdansk receiving the bulk of public support, while smaller regions and independent filmmakers encounter persistent barriers.

In the Nordic region, particularly Sweden, Denmark, and Finland, international film promotion is framed through an emerging (but, for now, mostly ad hoc) regional cooperation model facilitated by institutional networks and reinforced by regional funds and production centres. This collaborative but unstructured strategy enables these countries with strong cultural ties to pool resources and amplify their presence in the European and international market, thus compensating for the relatively small size of their domestic film industries. The interviewees highlighted the importance of the NFTVF and the Five Nordics in the regional development of the film industry and their promotion (namely, via the increasing coordination of their promotional efforts at major film



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festivals) and, secondarily, in the funding of co-productions. Nationally, the Nordic countries combine funding schemes with co-production and distribution support, often embedded within broader cultural policy frameworks aligned with inclusion, cultural diversity and sustainable development.

All countries participate in one or more EU-funded programmes, such as Creative Europe MEDIA. However, their engagement is shaped by various national priorities and levels of institutional capacity. France occupies a distinctive position within the European film landscape, with a high degree of institutional autonomy and a robust national policy framework. This duality enables France to play a pivotal role in shaping EU-level initiatives for the international promotion of film, while simultaneously maintaining a cautious stance toward deeper institutional integration within a unified European audiovisual architecture. As a result, the strong French engagement is tempered by concerns that the European initiatives could compromise the specific brand of the French cinema and the dynamic institutional model that underpins it.

Spain relies on European mechanisms to consolidate and promote its national film sector, even though the film cooperation with Latin American countries remains an important component of its film promotion policy. In this regard, EU recovery funds, made available temporarily due to the pandemic, have presented a unique opportunity to strengthen the audiovisual sector, enhance institutional coordination and support more effective policy execution. Programs like the Spain Audiovisual Hub represent a positive step forward. However, ensuring the continuation of the initiative beyond the exhaustion of EU funds is crucial for the film industry to maintain its momentum and for the program to extend its benefits beyond a limited timeframe, very much affected by a post-pandemic scenario.

Sweden, Denmark and Finland prioritise regional film partnerships, such as the Five Nordics network and the NFTVF, over deeper film integration at the EU level. Italy is a more ambiguous case. A lack of publicly accessible qualitative and quantitative data hampers detailed analysis of the EU's role in the internationalisation of the Italian film industry, leaving this area underexplored. In Poland, EU support is perceived as essential to the functioning of the national film economy, particularly through programmes like MEDIA. However, barriers to access, especially for smaller or emerging production companies, have led to concerns about unequal benefit distribution and the exclusion of underrepresented voices.



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Finally, the COVID-19 pandemic profoundly disrupted the European film sector, leading to significant declines in cinema attendance and accelerating the shift toward mostly US-based VoD platforms. All countries experienced a marked drop in box office admissions, providing a varied set of policy responses. France and Denmark implemented large-scale, structural support measures, whereas Greece and Finland faced constraints due to limited or delayed public resources. Italy and Spain leveraged EU recovery funds to modernise audiovisual infrastructure and boost location attractiveness for international productions.

During the pandemic, streaming platforms gained unprecedented visibility as theatrical releases became inaccessible. These platforms rapidly expanded their influence, transforming both the circulation and consumption of audiovisual content. In Spain, platforms emerged as a strategic vehicle for content exportation and a key driver for boosting local audiovisual productions. Nevertheless, challenges remain, particularly in terms of visibility for non-mainstream European content, especially films produced within Autonomous Communities and in official languages other than Spanish. In France, their presence has provoked ambivalence, viewed simultaneously as economic opportunities and threats to cultural sovereignty and diversity. In Finland, the growing presence of VoD platforms has prompted concerns among the policymakers about the long-term viability of local content production. Despite rising consumption, the absence of data collection hinders informed decision-making. In Sweden and Denmark, global platforms have rapidly integrated into national ecosystems, sometimes co-producing local content, yet raising tensions over the imbalance between their market power and the fragility of domestic production sectors. Denmark has been particularly active in negotiating with platforms and developed some levies in an attempt to regain control over the national film ecosystem. In Greece, the scarcity of data has hindered a comprehensive assessment of platform impact, despite widespread recognition of their growing significance. In Poland, the increasing popularity of VoD platforms led to the introduction of new regulations to better integrate them in the local market. However, despite legislative efforts, the current framework is still not strong enough to protect local professionals. Finally, in Italy, the general perception of a better circulation of Italian films is tempered by the scarcity of information available and concerns about the fragmentation of the EU market with the AVMSD.

Across all countries, unresolved challenges persist regarding platform regulation, data transparency, and fair remuneration for rights holders. Overall, while the post-pandemic context has generated various policy trajectories, it has also underscored a common imperative: a need to



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re-assess and adapt international film promotion strategies by taking into account technological transformations.



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6. ANNEXES

6.1 Annex I: Correspondence table for interviewees

Identification code	Profession/status of the interviewee
<i>Denmark</i>	
Int. Dk1	Industry representative
Int. Dk2	Producer
Int. Dk3	Industry representative
Int. Dk4	Policymaker
Int. Dk5	Producer and commissioner
Int. Dk6	Producer
Int. Dk7	Film professional
Int. Dk8	Producer
<i>Finland</i>	
Int. Fi1	Representative of a national film agency
Int. Fi2	Representative of a national film agency
Int. Fi3	Representative of a national film agency
Int. Fi4	Representative of a national film agency
Int. Fi5	Representative of a national film agency



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Int. Fi6	Former representative of a national film agency
Int. Fi7	Representative of a national film agency
Int. Fi8	Former representative of a national film agency, film professional
Int. Fi9	Former representative of a national film agency, film professional
Int. Fi10	Representative of a film association
Int. Fi11	Representative of a film association
Int. Fi12 (email interview)	Two representatives of a national film agency
<i>France</i>	
Int. Fr1	Distributors/Sales agents (Focus group, 3 representatives)
Int. Fr2	Distributors/Sales agents (Focus group, 2 representatives)
Int. Fr3	Representative of a national film agency
Int. Fr4	Representative of a national film agency
Int. Fr5	Representative of a national film agency
Int. Fr6	Expert
Int. Fr7	Expert
Int. Fr8	Representative of a national film agency
<i>Greece</i>	



Int. Gr1	CEO of a public entity
Int. Gr2	Former president of a public entity
Int. Gr3	Policy officer in a public entity
Int. Gr4	Policy officer of a public entity
Int. Gr5	Director of a public entity
Int. Gr6	Policy officer of a public entity
<i>Italy</i>	
Int. It1	Policymaker
Int. It2	Policymaker
Int. It3	Policymaker
Int. It4	Policymaker
Int. Nordic a	Policymaker
Int. Nordic b	Policymaker
<i>Poland</i>	
Int. Pol1	Film research specialist in a public organisation; audiovisual policy-maker
Int. Pol2	Former director of a film unit in a public entity; high-ranking audiovisual policy-maker



Int. Pol3	Director of a film unit in a public entity
Int. Pol4	Former spokesperson; high-ranking member of the film association
Int. Pol5	Member of the film association; film and TV producer
Int. Pol6	Former spokesperson; employee in a public entity for international culture
Int. Pol7	Former deputy director of research and development for film at a film organisation
Int. Pol8	Former director of a film unit in a public entity
Int. Pol9	Former member of staff of the European Commission institutions for film production
Int. Pol10	Public service media employee in the field of non-linear television
Int. Pol11	Film programme coordinator; member of the film association
Int. Pol12	Supervisor in a film production awarded with an Oscar
<i>Spain</i>	
Int. Sp1 (Spain)	Policymaker
Int. Sp2	Policymaker
Int. Sp3	Policymaker



Int. Sp4	Representative of promotion program
Int. Sp5	Representative of promotion program
Int. Sp6	Representative of promotion association
Int. Sp7	Regional policymaker
Int. Sp8	Regional policymaker
Int. Sp9	Regional policymaker
<i>Sweden</i>	
Int. Sw1	Policymaker
Int. Sw2	Film professional
Int. Sw3	Exhibitor
Int. Sw4	Producer
Int. Sw5	Producer
Int. Sw6	Exhibitor
Int. Sw7	Policymaker
Int. Sw8	Producer
Int. Sw9	Regional funder



6.2 Annex II: France

Name of the program	Annual budget allocated	Max. budget for each project	Number of projects funded	Geographical area of beneficiaries
Aides au cinéma du monde		Pre-production aid: €250,000 to €500,000 Post-production aid: Up to €70,000	50 to 60 projects per year, more than 600 projects in total	
Fonds Sud Cinéma (1984-2005)	€2,000,000	€152,000	More than 500 projects in total	Africa, Latin America, Asia, the Near and Middle East and certain Eastern European countries since 1997
Camera libre	€200,000	€25,000	8 to 10 beneficiaries every 6 months	Countries with a difficult political situation, excluding residents from the EU and European Free Trade Association states, Australia, Canada, South Korea, USA, Japan, Monaco, New Zealand and the UK.
COCO-I	€400,000	€50,000	8 per year	
French immersion XR	€45.000	Travel allowance: €300 in EU, €1,000 outside EU (excl. VAT)	21 films in 2023 ; 35 films in 2024.	



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			98 travel allowances allocated to 56 films in total.	
Fund for the promotion of cinematic works abroad		The amount is calculated based on the number of admission: €0.70 ≤ 50,000; €0.35 ≤ 100,001; €0.15 ≤ 200,001; €0.05 ≤ 700,001. Flat-rate amount of €4,000 per film with fewer than 50,000 admissions or without a foreign cinema release and selected in at least two international festivals.		France (French companies)
IF residencies		Rental costs and allowance of at least €1,000 per month		
Inspiration Tour	€50,000		1 per year before 2025, since then 2 per year	
Support for short film exporters abroad	€600,000	€13,000 by company each year		France (French companies)
Tax rebate for international production (TRIP)	N/A	It covers 30 to 40% of expenses incurred in France, capped to €30,000,000 per project		

Table 1. Selective overview - French programmes funding.



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6.3 Annex III: Greece

H.F.A.C. - Creative Greece DG AV, Technology & Creation AV & Creation Investment Dir.	Description
40% Cash Rebate GR-Film and Television (CRGR-FTV)	Funding economic Activities – Activity Codes (A.C.): 59.11 Motion Picture, video and television programme production activities and 59.12 Motion picture, video and television programme post-production services
Cash Rebate GR-Animate (CRGR-Animate)	Funding economic Activities – Activity Codes (A.C.) included in the CRGR-FTV aid scheme, in cases where the production of the audiovisual work concerns animation, in addition to the activities 59.12.14 Motion picture visual effects services and 59.12.15 animation services;
Cash Rebate GR-Video Game Development (CRGR-VGD)	Funding economic Activity – Activity Code (A.C.) 62.01.21 Production of computer game software prototypes.
Tax Relief 30%	Additional tax exemption tool by Law 4704/2020 (Article 12) for investments through further incentives to support film productions in Greece ²⁰ . The programme can be used in combination with the cash rebate, reaching up to 50% of the total production cost of a project.

Table 2. Automatic Schemes for Films, TV Series and Digital Games by H.F.A.C. - Creative Greece.

H.F.A.C. - Creative Greece DG Film Film Development & Production Dir.	Description
Main Selective Program	Selective scheme funding feature film projects by Greek filmmakers across fiction, documentary and/or animation. The scheme offers funding for screenwriting (max. amount offered: €7,000), development (max. amount offered: €15,000) and production (max. amount offered: €350,000).

²⁰ Following the implementation of Law 4172/2013-71E and Joint Ministerial Decision 1007/09-01-2019.



Debut Program	Selective scheme funding feature debut projects by Greek filmmakers across fiction, documentary and/or animation. The scheme offers funding for screenwriting (max. amount offered: 7,000€), development (max. amount offered: €15,000) and production (max. amount offered: €250,000).
Short Film Program	Selective scheme funding the production of short films by Greek filmmakers across fiction, documentary and/or animation. A maximum of €35,000 per project is offered and an average of 20 projects per year is supported across two calls.
Micro-Budget Program	Selective scheme funding the production of low-budget short and feature films (min. duration: 60mins) across fiction, documentary and/or animation. The scheme is designed to support films which can be completed within a short amount of time (14 months since funding approval) and with limited funds (max. budget for fiction features allowed: €100,000).
Completed Film Program	Selective scheme funding films which have been produced without any funding support from the Hellenic Film and Audiovisual Centre – Creative Greece. There is one call per year and an option is given to apply either for (i) a maximum of €100,000 in exchange of HFAC receiving a profit share on the film or (ii) a maximum of €25,000 offered as subsidy.
Minority Program	Selective programme for funding film projects originating outside Greece, but with a Greek minority co-producer and Greek participation in either cast, crew, labs and/or shooting in Greece.
Location Scouting Support Program	Supports a) the preliminary location scouting of film and television projects of foreign initiative which are interested in exploring the possibility of shooting in Greece or b) the location scouting during the pre-production stage of film and television projects of foreign initiative which have proven to be planning to shoot in Greece.

Table 3. Selective Schemes for Film Development & Production, by H.F.A.C. Creative Greece.



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H.F.A.C. - Creative Greece / DG Film / Hellas Film	Description
Promotion of Greek films for the International premiere	Supporting the international premiere of Greek films or Greek minority co-productions.
Distribution of Greek films in Greek cinema theatres	Supporting the distribution of Greek or Greek minority co-productions in cinemas in Greece in order to develop the engagement of the audience with Greek cinema.
Support to film festivals	Supports film festivals organised in Greece and film festivals abroad focused on Greek cinema.
Promotion of Greek films as Works in Progress	Supporting participation of Greek films in the Work in Progress stage at the major international film markets.

Table 4. Hellas Film Selective Schemes for Film Distribution and Promotion by H.F.A.C. - Creative Greece.

H.F.A.C. - Creative Greece / DG AV Technology & Creation / Creative Hub GR	Description
Networking and community development in the CCI's (gaming, digital media, animation, innovation technologies)	<i>Liaison</i> between Start-ups, CCI's players, young creators, media industry
Promotion of new talents in the CCI's through EU programmes and R&D to strengthen Greek human resources in the global film market	Up-skilling, reskilling in education, technology, innovation, capacity building
Developing media and digital literacy skills in school education and lifelong learning as life skills of the 21st citizen	educational programmes, open educational resources, school networks, projects and train the trainer programmes
Safeguarding and strengthening protection and preservation of cultural and audiovisual film heritage	digital repository of audiovisual creation, managing national greek film archive, exchange of hands on expertise and know-how on digitization and preservation of film memory

Table 5. Creative Hub GR programmes on film education, training, promotion and innovation by H.F.A.C. - Creative Greece



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6.4 Annex IV: Finland

Year	€ / FIM (Finnish mark)	share of the budget %
1999	FIM 1,344,121	N/A
2000	FIM 1,466,618	N/A
2001	€251,854	N/A
2002	€249,585	N/A
2003	€251,153	N/A
2004	€250,766	N/A
2005	€338,275	N/A
2006	€344,864	N/A
2007	€350,641	N/A
2008	€405,525	N/A
2009	€481,679	3
2010	€553,905	3
2011	€660,059	3
2012	€660,686	2
2013	€826,588	4
2014	€743,944	3
2015	€781,084	3
2016	€638,420	3
2017	€687,424	3
2018	€687,580	2,3



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2019	€564,678	2,7
2020	€771,249	2
2021	€685,581	1,9
2022	€697,700	2,8
2023	€579 925	2,5

Table 6. Support for international promotion granted by FFF. Source: FFF, Facts & Figures 1999–2023.

6.5 Annex V: Denmark

VoD platforms in Denmark: key regulations		
Streaming levy and investment obligation	Agreement with streaming platforms	Production rebate
Cultural Contribution Act, December 2023 establishes a levy (2% basic rate; can be increased to 5%) and investment obligation in new Danish content	Individual agreements with multiple platforms, the first of which was agreed with Netflix in late 2022, providing guaranteed rights remuneration, including a success-based bonus, based on shared data.	Reimbursement of 25% of production costs in Denmark (up to DKK 20 million; approx. €2.68 million per individual production). Applicable from 2026.

6.6 Annex VI: Sweden

VoD platforms in Sweden: key regulations	
Production reimbursement	Tax rebate
25% discount on production costs	30% rebate on eligible expenses



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PART B – T3.5: EU LAW AND GOVERNANCE AND THE PROMOTION OF THE EFI ON THE INTERNATIONAL SCENE

EXECUTIVE SUMMARY

This study focuses on EU law and policies governing the presence of European audiovisual works and film on the international scene. The European audiovisual sector, particularly the European film industry, has its own place in the external cultural and economic relations of the EU because of the multifaceted nature of audiovisual content. From a social and cultural perspective, audiovisual works express the unique features of European societies and cultures. From a market-oriented perspective, they constitute highly profitable export items. Consequently, maintaining the competitiveness of the European audiovisual and film sectors and ensuring the presence of European audiovisual works in international markets beyond the EU not only promise economic revenues, but is also an effective way to promote European cultures and identities and support cultural diversity at the international level.

The study examines and assesses whether—and, if so, how—EU law and policies promote European audiovisual works and film beyond the borders of the EU. It does so by mapping the policies and instruments in place, identifying their characteristics, complementarity, enablers and limitations in enhancing the internationalisation of the European audiovisual industry. It focuses on agreements the EU has negotiated with third countries and regions with regard to trade facilitation and cooperation in the audiovisual and film sectors. It also examines EU funding instruments for the audiovisual sector and external action. Methodologically, the research draws on extensive desk research and the analysis of a range of primary and secondary sources which include EU agreements with third countries, EU legal acts and instruments, official EU and international documents, as well as the broader scholarly literature. The findings are also informed by insights gathered through semi-structured interviews with EU officials and film stakeholders.

The study is structured as follows: Section 2 provides an overview of the milestones that have defined European external policies concerning the audiovisual and film sectors. Sections 3 and 4 examine the role of EU law, policies and governance in promoting European audiovisual works and film internationally. Section 3 in particular considers economic and other agreements the EU has negotiated with third countries, covering agreements with developing countries, developed countries, neighbourhood countries and enlargement countries. Section 4 investigates the ways in



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which EU funding instruments address audiovisual cooperation and exchanges between the EU and third countries. Section 5 compiles an inventory of the principal dimensions addressed through the aforementioned instruments which have the potential to enhance the presence of European audiovisual works worldwide. Section 6 assesses EU efforts to promote the internationalisation of European audiovisual works, and section 7 offers concluding remarks and policy recommendations.

Although they pursue different objectives, several EU policies can support the internationalisation of the European audiovisual industry. The analysis shows that EU agreements with third countries and audiovisual cooperation and external funding tools contain various elements that can boost the positioning of European films worldwide, although they do vary in terms of their scope and focus depending on the instrument and the country at issue. These are: a) capacity-building, exchanges and mobility for European audiovisual professionals in third countries; b) promotion of co-productions between the EU, its Member States, and third countries; c) incentives for the production, promotion and distribution of European audiovisual works in third countries; d) cooperation in international fora; e) regulatory cooperation and compliance with the EU audiovisual acquis; and f) policy dialogue on audiovisual issues.

However, the analysis also shows that there is untapped potential in terms of enhancing the internationalisation of the European audiovisual industry. While audiovisual cooperation is an element that has been integrated into the EU's external relations and the agreements entered into with third countries, the relevant provisions have remained dead letters for the most part. They have not garnered the support required for implementation and consolidation, and they have not been backed by adequately-supported implementation structures and resources. At the same time, the EU's flagship programme for the audiovisual sector, Creative Europe, has not sufficiently incorporated across its various actions an explicit international outlook.

The study concludes by advocating better use of the policy space the seminal “audiovisual exception” the EU typically follows in its trade relations in order to promote the internationalisation of the European audiovisual sector. This requires the devising of a comprehensive strategy that brings together in a coherent framework the different elements of the Union's audiovisual cooperation with third countries and funding tools, promoting the competitiveness of the European audiovisual sector while supporting cultural diversity. Proposing such a strategy should go hand in hand with institutionalisation in terms of establishing appropriate implementation and monitoring structures.



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LIST OF ABBREVIATIONS AND ACRONYMS

AA	Association Agreement
ACP	African, Caribbean and Pacific
ASEAN	Association of Southeast Asian Nations
ASEF	Asia-Europe Foundation
ASEM	Asia-Europe Meeting
AVMSD	Audiovisual Media Services Directive
CA	Central America
CEPA	Comprehensive and Enhanced Partnership Agreement
CETA	Comprehensive Economic and Trade Agreement
CoE	Council of Europe
CAI	Comprehensive Agreement on Investment
Cultural Agenda	European Agenda for Culture in a Globalizing World
CCA	Cultural Cooperation Agreement
DCFTA	Deep and Comprehensive Free Trade Area
DCI	Development Cooperation Instrument
DTA	Digital Trade Agreement
EaP	Eastern Partnership
EDF	European Development Fund
EEA	European Economic Area
EEC	European Economic Community
EFTA	European Free Trade Association
EMP	Euro-Mediterranean Partnership
ENP	European Neighbourhood Policy
EPA	Economic Partnership Agreement
EU	European Union
FTA	Free Trade Agreement
GATT	General Agreement on Tariffs and Trade



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GATS	General Agreement on Trade in Services
GSP	General Scheme of Preferences
IPA	Investment Protection Agreement
MFN	Most-Favoured-Nation principle
MIP	Multi-annual Indicative Programme
OCTs	Overseas Countries and Territories
PCC	Protocol on Cultural Cooperation
SADC	Southern African Development Community
SOEs	State-owned Enterprises
SPA	Strategic Partnership Agreement
SAA	Stabilisation and Association Agreement
SAP	Stabilisation and Association Process
TCA	Trade and Cooperation Agreement
TEU	Treaty on European Union
TFEU	Treaty on the Functioning of the European Union
TWFD	Television without Frontiers Directive
UfM	Union for the Mediterranean
UK	United Kingdom (UK)
UN	United Nations
UNESCO	United Nations Educational, Social and Cultural Organisation
UNESCO Declaration	UNESCO Universal Declaration on Cultural Diversity
CDCE, UNESCO Convention, 2005 UNESCO	UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions
US	United States
WIPO	World Intellectual Property Organisation
WTO	World Trade Organisation



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INTRODUCTION

The audiovisual sector, particularly the European film industry, has its own place in the external cultural and economic relations of the European Union (EU). The distinct position of the audiovisual and film sectors in the Union's external relations and policies stems from the multifaceted nature of audiovisual and cinematographic content. From a social and cultural perspective, audiovisual and cinematographic works serve as tools with the capacity to record and express histories, fundamental values, cultures, and unique features of European societies and countries.²¹ From a market-oriented perspective, audiovisual and cinematographic content constitutes a crucial and highly profitable export item (Vlassis, 2019). Consequently, maintaining the competitiveness of the European audiovisual and film sectors and ensuring the presence of European audiovisual works in international markets beyond the EU not only promise greater economic revenues, but is also an effective way to promote European cultures and identities beyond the borders of the EU and support cultural diversity at the international level.

The cultural and economic importance of audiovisual content has been posing complex challenges to several European states vis-à-vis their external relations and decisions in global trade negotiations since the early 1940s. After half a century of such complexities overhauling the norm-setting forums at the international level, the EU's commitment to pursuing a cultural and audiovisual policy that is compliant with European perceptions of culture and the Union's dedication to cultural diversity were consolidated in the Treaty of Lisbon, which was signed on 13 December 2007 and entered into force on 1 December 2009. The Treaty of Lisbon underlined respect for cultural (and linguistic) diversity, together with safeguarding and enhancing Europe's cultural heritage as a main EU objective in Article 3 of the Treaty on European Union (TEU). Moreover, it explicitly recognised that the Union shall respect the national identities of Member States in Article 4(2) TEU, and gave the EU Charter of Fundamental Rights binding legal force.²² The latter requires the EU institutions and bodies to respect cultural diversity in the exercise of their competences and also makes respect of cultural diversity a duty of the Member States when they implement EU law.²³

²¹ See indicatively Council Resolution 94/C 85/02 of 5 November 1993 on the first century of the cinema. <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=OJ:C:1994:085:FULL>; Commission Communication to the Council, the European Parliament, the Economic and Social Committee and the Committee of the Regions on certain legal aspects relating to cinematographic and other audiovisual works, COM(2001) 534 final, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52001DC0534>.

²² Art. 6(1) TEU.

²³ See Art. 22 CFR in conjunction with Art. 51(1) CFR.



This evolution of the EU's constitutional framework concerning culture has proceeded hand in hand with the Treaty of Lisbon stating, as its precursors, that the Union “shall contribute to the flowering of the cultures of the Member States, while respecting their national and regional diversity and at the same time bringing the common cultural heritage to the fore”.²⁴ Article 167 Treaty on the Functioning of the European Union, which is devoted to culture, recognises that the Union shall, in essence, assist in the development of Member States’ cultures and only support and supplement their action in specific areas, “if necessary”.²⁵ It also provides that the Union shall foster cooperation with third countries and competent international organisations in the sphere of culture, in particular the Council of Europe (CoE).²⁶ Article 167(4) TFEU brings cultural diversity to the centre stage by affirming that the Union shall take cultural aspects into account in its action under other provisions of the Treaties, “in particular in order to respect and to promote the diversity of its cultures”.²⁷ Enacted to facilitate the accommodation of cultural considerations in EU action *in general*, this provision, the seminal “cultural horizontal (or mainstreaming) clause”, turns cultural diversity into a cross-cutting, horizontal EU policy objective (Psychogiopoulou, 2008; 2014a; Psychogiopoulou and Schoenmaekers, 2024: 2-3). Thus, in exercising its external powers, the EU must consider cultural diversity.

This commitment also derives from the UNESCO Convention on the protection and promotion of the diversity of cultural expressions (the UNESCO Convention),²⁸ adopted on 20 October 2005 and approved by the Council, on behalf of the EU, on 18 December 2006. By approving the Convention, which became an integral part of EU law pursuant to Article 216(2) TFEU, the EU became duty-bound to respect and implement its provisions in both its internal and external policies. The Convention requires parties to endeavour to reinforce international cooperation for the promotion of the diversity of cultural expressions, among other issues. This created momentum for reviving EU action in support of cultural diversity through the exercise of the Union’s external competences. Following the Convention’s entry into force on 18 March 2007, the Commission’s Communication on a European Agenda for Culture in a Globalizing World (the Cultural Agenda), published in May 2007,²⁹ identified the promotion of culture as a vital element in the EU’s international relations and as a key objective that should guide EU cultural activity. In the

²⁴ See Art. 167(1) TFEU.

²⁵ Art. 167(2) TFEU.

²⁶ Art. 167(3) TFEU.

²⁷ Art. 167(4) TFEU.

²⁸ UNESCO Convention on the protection and promotion of the diversity of cultural expressions, <https://www.unesco.org/en/legal-affairs/convention-protection-and-promotion-diversity-cultural-expressions>, 20 October 2005.

²⁹ Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee, and the Committee of the Regions on a European agenda for culture in a globalizing world, COM(2007) 242.



Commission's view, the EU's external action should henceforth be based on the systematic integration of cultural considerations into all EU external policies, and on the provision of support for specific cultural actions and events strengthening access to culture. On this basis, four main policy axes for cultural action were identified: developing political dialogue and exchanges; promoting access for the cultural goods and services of developing countries to both European and other markets; using external policies to support cultural diversity; and strengthening EU involvement in the work of international organisations dealing with culture.

The years since have witnessed efforts at implementation. In 2016, the European Commission and the High Representative for Foreign Affairs and Security Policy issued their Joint Communication Towards an EU Strategy for International Cultural Relations in response to calls from the Council and the European Parliament to increase synergies, pool resources, and provide more visibility to cultural cooperation and exchanges.³⁰ This sought to establish a more coordinated EU approach to international cultural relations by creating a framework for cultural cooperation with partner countries. The 2019 Council Conclusions on an EU strategic approach to international cultural relations and a framework for action set forth the following key objectives for relevant EU action: improving the coherence of EU policies at a multilateral level; fostering mutual learning, cross-cultural understanding and trust between the EU and its partners in external relations; mutually reinforcing the external dimensions of the EU's cultural policies, programmes and projects as well as the cultural and creative dimension of the international relations of the Union and its Member States; and achieving synergies and complementarity between the activities undertaken by the EU and its Member States in third countries. Moreover, the New European Agenda for Culture, adopted in 2018, identified the strengthening of international cultural relations as a strategic objective.³¹ It also brought the digital dimension to the forefront as a transversal element that should imbue action in the field.

This study is devoted to EU law and policies governing the presence of European audiovisual works and film on the international scene. It examines and critically assesses whether—and, if so, how—EU law and policies promote European audiovisual works and film beyond the borders of the EU. In particular, the study maps and probes the distinct policies and instruments in place, exploring their characteristics, complementarity, enablers and limitations. By examining the

³⁰ Joint Communication to the European Parliament and the Council, Towards an EU strategy for international cultural relations, JOIN/2016/029.

³¹ Communication from the Commission to the European Parliament, the European Council, the Council, the European Economic and Social Committee and the Committee of the Regions, A New European Agenda for Culture, COM(2018) 267.



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existing regulatory toolkit and assessing its strengths and weaknesses, the study builds on—but also goes beyond—the existing literature, which has largely focused on EU law and policies aimed at promoting European audiovisual works and films *within* the EU. At the same time, works concerned with the external dimension have centred on isolated EU policies, such as those dealing with trade or development cooperation. This study engages in a comprehensive analysis of different EU policies and legal instruments and their contribution (or non-contribution) to the internationalisation of the EU audiovisual industry. This is essential for informing the current scholarly and policy debates on boosting EU competitiveness, including EU competitiveness in the audiovisual and film sectors, amidst technological developments and in a volatile international environment, while staying true to the EU's commitment to respect and promote cultural diversity.

Methodologically, the study draws on desk research and the analysis of a range of primary and secondary sources. These include agreements the EU has negotiated with third countries, EU legal acts and instruments, official documents produced by the EU and international organisations, international conventions, as well as the broader scholarly literature and research and policy reports.³² Moreover, the study's findings are informed by information and insights gathered through 10 semi-structured interviews with EU officials and film stakeholders ([see Annex, Table 1](#)). The interviews were conducted online between January and May 2025.³³

The study is structured as follows: Section 2 focuses on the international instruments that have influenced the EU's external cultural and audiovisual policies and agenda. It examines how cultural diversity considerations and the impact economic globalisation has had on the European audiovisual sector and film industry have shaped the Union's external policies and international position regarding the European audiovisual and film industry. It provides an overview of the milestones that have defined the genesis and evolution of European external policies concerning the audiovisual and film sectors in parallel with the establishment of the World Trade Organisation (WTO). Against this background, it presents key international instruments adopted by the United Nations (UN) and the CoE that have defined the Union's external policies regarding European audiovisual works and film.

Sections 3 and 4 examine the role of EU law, policies and governance in promoting European audiovisual works and film internationally. They identify the EU policies, tools and instruments available and assess the capabilities and limitations of this policy toolkit vis-a-vis the

³² For the full list of agreements and funding instruments analysed, see Annex, Table 2 and Table 3.

³³ Interviewees received participant information sheets and informed consent forms beforehand via e-mail and were digitally recorded with their permission.



internationalisation of the European film sector. Section 3 considers economic and other agreements the EU has negotiated with third countries and regions with regard to trade facilitation and cooperation in the audiovisual and film sectors as part of the Union exercising its external competences. It covers agreements with developing countries, developed countries, neighbourhood countries and enlargement countries. Section 4 delves into the ways in which EU funding instruments address audiovisual cooperation and exchanges between the EU and third countries, as well as the internationalisation of European audiovisual works and film.

Section 5 organises and categorises the findings of the study. An inventory is compiled of the principal dimensions addressed through agreements and funding instruments which have the potential to expand the reach, visibility, and global competitiveness of European audiovisual content and thus enhance its presence worldwide. Enablers are also identified, along with gaps in existing instruments and approaches vis-à-vis distinct third countries and regions. Section 6 assesses EU efforts to promote the internationalisation of European audiovisual works and films, focusing on three key components: the audiovisual exception in trade policy; audiovisual cooperation with third countries and regions; and audiovisual and external action funding tools. Section 7 offers concluding remarks and puts forward recommendations for a concerted EU approach to enhance the global positioning of European audiovisual works.



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1. THE INTERNATIONAL PROMOTION OF THE EUROPEAN FILM INDUSTRY AT THE GLOBAL LEVEL: EU RELATIONS WITH THE WTO, THE CoE AND UNESCO

1.1 Historical Background: The interplay between economic globalisation, European audiovisual and cinematographic content, and cultural diversity at the international trade norm-setting Forums (GATT/GATS and the WTO)

Cultural diversity is at the centre of the EU's cultural policies and agenda, especially those concerning the European audiovisual and film sectors. The introduction of cultural diversity into the EU's internal and external cultural goals and policies has historically led to the adoption of defensive measures seeking to preserve European identities and cultures, as well as positive measures aimed at promoting cultural diversity at the supranational and international levels.

Considering how deeply ingrained cultural diversity is in European cultural history and policies, any effort to fathom its gravity for the current EU policies and agenda on the internationalisation of the European cinematographic scene, as well as the motives driving the Union's external relations vis-à-vis the European film industry, necessitates a retrospective analysis of the cultural relations both of individual European states and of the EU (or, previously, the European Economic Community, EEC) in global norm-setting forums. This sub-section provides an overview of the milestones that have defined the genesis and evolution of European external audiovisual and film policies in parallel with the establishment of the WTO system to facilitate the trade liberalisation pillar of economic globalisation, and the—primarily defensive—measures taken to prevent the possible negative outcomes of such an endeavour.

Cultural policies in Europe have been influenced by political pressure from, and the economic interests of, the pro-liberalisation front, which paved the way for bilateral and multilateral trade negotiations aimed at liberalizing the global trade in goods and services, including those relating to audiovisual and cinematographic content. In light of clashing interests with regard to the cultural and economic dimensions of cultural goods and services, the integration of cultural aspects into global trade talks resulted in the emergence of “cultural diversity” as a legal concept which responded to the political tensions stemming from the multilateral trade agreements negotiated and concluded under the auspices of the WTO and its predecessors in the aftermath of World War II (Pauwels & Loisen, 2003; Graber, 2006; Hahn, 2006).



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The international political discourse on—and underlying political tensions concerning—European cinematography predate the foundation of the EU, or more precisely, the EEC, as they can be traced back to the international-trade-related negotiations of the 1940s. This period witnessed the peak of European preventive measures to protect European identity and defend European culture against the expansion of American cultural content and the export of American values in the form of cultural “products” (Pauwels & Loisen, 2003; Chiang, 2007; Formentini & Lapadre, n.d.). Many European states took drastic measures, such as “import quotas” restricting the flow of American products into European markets. These measures were coupled with screen quotas to safeguard screen time for national cultural content whilst limiting the distribution of American audiovisual content and films to European audiences (Pauwels & Loisen, 2003; Graber, 2006; Hahn, 2006; Chiang, 2007). Claiming that these measures constituted trade barriers, the United States (US) insisted on abolishing them in exchange for the Marshall Plan. Whereas the negotiations on this front failed to meet American expectations, European resistance to American cultural content set the tone for global trade talks in the following years at multilateral platforms (Pauwels & Loisen, 2003).

Having defined the spirit of the late 1940s, economic globalisation and international negotiations for trade liberalisation paved the way for the deregulation of international trade relations, mainly in response to the market’s needs vis-à-vis the advancement of technology and the facilitation of cross-border trade (Graber, 2006; Chiang, 2007). In this regard, 1948 marked the start of a new global trading system operationalised by the General Agreement on Tariffs and Trade (GATT),³⁴ which aimed to liberalise the trade in goods among the contracting parties.

As indicated in its preamble, the GATT was devised as a multilateral legal instrument for reducing tariffs and other barriers to the free flow of goods whilst eliminating the discriminatory practices stemming from the trade-related laws and regulations of states entering into bilateral or multilateral trade agreements. To do so, Article I of the Agreement introduced the Most-Favoured-Nation principle (MFN), whereas Article III introduced the principle of the national treatment of taxation and regulation.

In broad terms, the MFN principle sought to levy the customs duties and charges imposed on any goods imported and exported and on international money transfers, by ensuring that “any advantage, favour, privilege or immunity” granted by a contracting party to another would apply to

³⁴ GATT (1948), The General Agreement on Tariffs and Trade, Geneva, https://www.wto.org/english/docs_e/legal_e/gatt47_01_e.htm.



all GATT contracting parties within the GATT territory³⁵. To further promote the conditions for global trade, the national treatment principle provided that the imported goods of a contracting party shall not be treated less favourably than the domestic products.³⁶ Other provisions provided for the elimination of fees and formalities regarding the import and export of goods, as well as for the publication of national trade regulations to enhance transparency and to support the predictability of laws and regulations introduced by GATT-contracting parties to ease the transborder flow of goods.

As such, the GATT, and especially the MFN and national treatment principles, inevitably impacted the audiovisual and film sectors. Indeed, the Agreement was crucial for the governance of the international distribution of audiovisual and cinematographic content, mainly because it challenged the continuation of European import quotas for foreign films and television broadcasts—given that the tangible media through which audiovisual and cinematographic works are traded were considered “goods” in the context of the GATT. Such a purely economic approach to cultural content was advocated by the US. Nevertheless, this approach was contested by the members of the European Economic Community, especially France. Whereas a cohort of negotiators advocated the exclusion of cultural goods from the global trade negotiations, the tension over the inherent value of cinematographic works was settled with a compromise on the American side, with the inclusion of a legal provision in the GATT that allows the signatories to reserve screen time for national and other preferred cinematographic content (Pauwels & Loisen, 2003; Chiang, 2007).

Thus, Article III (10) of the GATT provides an exemption for cinematographic films by giving the contracting parties the discretion to establish or maintain “internal quantitative regulations” for cinematographic content if such regulations meet the requirements set by Article IV: namely, that they are introduced in the form of “screen quotas” to ensure that “a specified minimum proportion of the total screen time”³⁷ is allocated to films of national or other specified origin. However, Article IV also required that “screen quotas [...] be subject to negotiation for their limitation, liberalisation or elimination.”³⁸

Aside from being of a temporary nature, this manoeuvre was a partial solution to permitting the commodification of cultural goods and the free trade in audiovisual and cinematographic content.

³⁵ Ibid., Art. I.

³⁶ Ibid., Art. III.

³⁷ Ibid., Art. IV.

³⁸ Ibid.



The import quotas imposed on the American market actors would be challenged once again, this time in relation to the legal nature of television broadcasts and the applicability of GATT provisions to such content (Pauwels & Loisen, 2003).³⁹ While the US, to optimise the market return of American cultural content vis-à-vis the expansion of the trade in television broadcasts, advocated a limited interpretation of Article IV of the GATT by restricting its scope to films, the idea of subjecting broadcasts to the MFN and national treatment principles was resisted by the European Community members (De Witte, 2001). At the time, the European states managed to deflect the American market's interest in exporting American television programmes to the European audiovisual market by limiting the definition of cultural "goods" to the medium on which audiovisual and cinematographic content is fixed – thus, sidestepping the demands over the liberalisation of cultural "services" such as broadcasts through the GATT (Pauwels & Loisen, 2003). However, the debates over the commercialisation of cultural content, including audiovisual and cinematographic content, continued at various other forums, mainly at the Uruguay Round (1986-1994), which led to the establishment of the WTO in 1994 and the adoption of the General Agreement on Trade in Services (GATS)⁴⁰ in 1995 (De Witte, 2001; Pauwels & Loisen, 2003; Hahn, 2006; Neuwirth, 2006).

Political tensions between the US and European negotiators peaked during the last phase of the Uruguay Round with the re-opening of negotiations vis-à-vis the liberalisation of audiovisual services (De Witte, 2001; Pauwels & Loisen, 2003). The US approach and claims regarding the economic aspects of cultural "services" were resisted by the Europeans (Pauwels & Loisen, 2003; Vlassis, 2019). A single-sided economic approach to cultural content was deemed not only to facilitate the influx of American cultural services into the European audiovisual and film market, but also a threat to the plurality of cultures and cultural identities within Europe. The latter was flagged for creating a "uniform, commercial monoculture and a loss of social cohesion and national identity" (Chiang, 2007: 379).

The Uruguay Round coincided with Europe's re-evaluation of the economic implications of the operation of broadcasting as a public service and the possible economic returns from the privatisation of the television sector. In this regard, the Television without Frontiers Directive (TWFD) constituted the first step towards a more economic contemplation of television broadcasts,

³⁹ Communication from the United States, WTO S/C/W/78 (1998, December 8), https://docs.wto.org/dol2fe/Pages/FE_Search/FE_S_S009-DP.aspx?language=E&CatalogueIdList=68941,101492,81711,86402,70101,63088,1776,41894,32661,12526&CurrentCatalogueIdIndex=8&FullTextHash=&HasEnglishRecord=True&HasFrenchRecord=True&HasSpanishRecord=True.

⁴⁰ GATS (1995), The General Agreement on Trade in Services, WTO, https://www.wto.org/english/docs_e/legal_e/26-gats_01_e.htm.



in so far as it adopted pro-liberalisation measures (Pauwels & Loisen, 2003); however, it also preserved the screen quotas for European content, by closely following the letter of Article IV of the GATT, is well-known (De Witte, 2001).

Negotiated and adopted under the auspices of the WTO, the GATS sought to liberalise the trade in services, except for non-commercial services endorsed by governmental authority and air transport services, within the GATS territory. To achieve this goal, the GATS introduced the MFN and national treatment principles, along with a set of other arrangements facilitating the free trade in services. These measures resemble those of the GATT, and included—but were not limited to—the elimination of trade restrictions and quantitative quotas as well as the publication of trade-related laws and regulations.

The policy gap that remained for services was thus filled with the adoption of the GATS, which also applied to the broadcasting and theatrical screening of audiovisual and cinematographic content. Recognised as “services” under the terms of the GATS, the adoption of this agreement resolved the debate on whether the GATT provisions applied to television broadcasts (Pauwels & Loisen, 2003). Nevertheless, per contra the GATT, the GATS lacked a “cultural exception” that would exempt theatrical releases and television broadcasts from the MFN and national treatment principles (Pauwels & Loisen, 2003; Vlassis, 2019). To help introduce and maintain import quotas to protect and preserve the European cultural landscape, along with the audiovisual and film sectors, the European Community refrained from committing to those legal provisions within the GATS which promoted the MFN and national treatment clauses (De Witte, 2001; Pauwels & Loisen, 2003; Neuwirth, 2006; De Witte, 2001; Messerlin & Cocq, 2004).

The negotiation and implementation phases of the GATT and GATS proved the shortcomings of exemptions and reservations envisaged for cultural goods and services (Graber, 2006). It was from the lessons learned in this political and diplomatic climate that the notion of “cultural diversity” originated. The concept emerged as a response to the intensification of economic globalisation, attesting to the need for effective means to safeguard the diversity of different cultures. Its rationale was justified by the potential exposure of cultural goods and services, which are intertwined with communal identities and values, to market failures that might result in the underrepresentation of different cultures, especially historically marginalised and vulnerable ones, in an unregulated global market (Formentini & Iapadre, n.d.; Graber, 2006; Vlassis, 2019). Therefore, to combat the adverse impacts of globalisation and trade liberalisation on the cultural aspects of goods and services, as well as on the diversity of cultures, the idea of drafting an



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international instrument addressing the preservation of cultural diversity was born in the late 1990s.

1.2 EU external cultural and audiovisual policies and agenda: Revitalisation and promotion of the European audiovisual and film industry in the context of cultural diversity

The EU's approach to cinematography has been multifaceted, attributing cultural, educational, and social features to audiovisual and cinematographic content, in addition to its economic value (Psychogiopoulou et al., 2024). Documenting the earlier Union policies and agenda revolving around cinematography, the Council Resolution of 5 November 1993 acknowledged cinema as “a witness to the history of humankind”.⁴¹ The Recommendation of 16 November 2005, building upon this Resolution, spotlighted the “educative” potential of cinematographic content due to the opportunity it bestows upon society at large to critically reflect on European history.⁴² Along the same lines, the Commission Communication of 16 February 2002 created a direct link between cinema and communal identities and culture. It highlighted that “[a]udiovisual works, cinema in particular, play an important role in shaping European identities, both in common aspects shared across Europe and in the cultural diversity that characterises different [European] traditions and histories.”⁴³

These public policy references, on the one hand, justify the defensive measures that have been adopted by European states to preserve their national cultural identities and values, as presented and disseminated within audiovisual and cinematographic content. On the other hand, they point to European cultural priorities and the public policy rationale of distinguishing cultural content from ordinary commodities, which are subject to the GATT/WTO system.

Given the organisation, motivations and mandate of the GATT/WTO system, it became clear that global cultural policies concerning the audiovisual and film sectors required an alternative international norm-setting forum where the international policies and rules can be set on a clean slate and with a new perspective that can accommodate cultural aspects of audiovisual and cinematographic content in addition to its economic value. In this sense, the UN was

⁴¹ Council Resolution 94/C 85/02.

⁴² Recommendation 2005/865/CE of the European Parliament and of the Council on film heritage and the competitiveness of related industrial activities. <http://data.europa.eu/eli/reco/2005/865/oj>.

⁴³ Commission Communication, COM (2001) 534 final.



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foregrounded, due to its capacity and power to deviate from the market-oriented international legal discourse and negotiations supervised by the WTO, whilst introducing a cultural dimension therein (Chiang, 2007). Eventually, cultural diversity was consolidated into two international instruments negotiated within the UN system and adopted under the aegis of the United Nations Educational, Social and Cultural Organisation (UNESCO): the Universal Declaration on Cultural Diversity (UDCD or the UNESCO Declaration) adopted in 2001, and the Convention on the Protection and Promotion of the Diversity of Cultural Expressions (CDCE, the UNESCO Convention on Diversity of Expressions, or the UNESCO Convention) adopted in 2005.

1.2.1 Cultural norm-setting at the global level: European Union & United Nations

The legal instruments administered by the UN, specifically the UDCD and the UNESCO Convention adopted by UNESCO, are key both to the Union's external relations and to its policies and agenda concerning the cultural and audiovisual sectors. Although they are not dedicated to the internationalisation of the audiovisual and film sectors per se, these instruments are crucial for the European audiovisual and film sectors—in part, too, because they are the outcomes of European efforts to counterbalance the international trade agreements negotiated under the GATS/WTO system and their implications for the European cultural landscape.

Conceptualizing and embracing “cultural diversity” as a notion of political and legal importance, the UDCD and the UNESCO Convention in particular have influenced the Union's internal and external cultural and audiovisual policies in two major ways. First, in contrast to the GATT and GATS, these instruments acknowledge and cherish the social and cultural dimension of cultural content, including content that is considered to be “goods and services” in the context of the GATT and GATS. These instruments therefore established a common understanding of—and legal framework for—cultural content at the international level. Second, the ratification of the UNESCO Convention by the EU paved the way for the mainstreaming of culture and cultural aspects in EU legislation and external policies, including those concerning the audiovisual sector and the European film sector (Psychogiopoulou, 2014a).

Adopted by UNESCO at its 31st session on 2 November 2001, the UDCD emphasises culture's relevance to—and interrelation with—identity, social cohesion and knowledge-based economies. In this context, the UDCD broadly articulates culture as “the set of distinctive spiritual, material, intellectual and emotional features of society or a social group [which] encompasses, in addition to



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art and literature, lifestyles, ways of living together, value systems, traditions and beliefs”.⁴⁴ Based on these abundant intrinsic values of culture, the UNESCO Declaration promotes the diversity of cultures as a complement to tolerance, dialogue and cooperation as means for maintaining international peace and security, while acknowledging the risks that globalisation poses for cultural diversity. The UDCD therefore lays the foundations for “a renewed dialogue among cultures and civilisations”⁴⁵ and encourages cultural exchange across the globe by ensuring “the preservation and promotion of the fruitful diversity of cultures”.⁴⁶

Driven by these aspirations and principles, the UDCD integrates cultural diversity into the human rights discourse by associating it with human dignity and acknowledging human rights as a guarantee of cultural diversity.⁴⁷ Also in this context, the UNESCO Declaration creates a close link between cultural diversity and cultural rights.⁴⁸ It advocates for all cultures having the opportunity to be expressed and recognised.⁴⁹ This idea(l) supports the free flow of ideas, freedom of expression, and media pluralism. The UDCD also considers intercultural exchange and cultural diversity as means for fostering creativity, as well as increasing the variety of cultural goods and services in the market, and hence the options available to consumers of such content.⁵⁰

These provisions, while tackling the market-related aspects of cultural content, depart from the GATT/WTO’s single-sided approach to cultural content, and underline that “cultural goods and services, as vectors of identity, values and meaning, must not be treated as mere commodities or consumer goods”.⁵¹ Furthermore, contrary to the GATT/WTO system’s assertion of the liberalisation of trade in cultural goods and services, the UDCD recognises the sovereignty and discretionary power of each State to pursue its own national cultural policies.⁵²

In this regard, the UDCD responds to the political tensions that have arisen from the GATT and GATS negotiations. Yet, consolidated into a non-binding legal instrument. The UDCD lacks any legal enforcement mechanism. Therefore, to give the principles and ideals compiled therein a legally binding effect, UNESCO officially adopted the UNESCO Convention at its 33rd session on 20 October 2005 by 148 votes in favour, two against (the US and Israel) and four abstentions (Australia, Honduras, Nicaragua, and Liberia) (Hahn, 2006; Neuwirth, 2006). The Convention

⁴⁴ Universal Declaration on Cultural Diversity, 2001, Preamble.

⁴⁵ Ibid.

⁴⁶ Ibid, Art. 4.

⁴⁷ Ibid.

⁴⁸ Ibid, Art. 5.

⁴⁹ Ibid, Art. 6.

⁵⁰ Ibid, Art. 9.

⁵¹ Ibid, Art. 8.

⁵² Ibid, Art. 9.



entered into force on 18 March 2007 (Neuwirth, 2006). Building upon and incorporating the UDCD into its operational text, often verbatim, the UNESCO Convention provided an antidote to the GATT and GATS (Hahn, 2006).

The UNESCO Convention refers in its preamble to globalisation's interplay with communal identities, cultures and values, while also acknowledging that technological advances facilitate the free flow of ideas and expression and enable intercultural exchanges. However, it underlines that such an enhanced cultural interaction may risk deepening the social and cultural divide between the Global North and Global South by making it easier for the former to impose certain cultural values and expressions upon the latter, hence diminishing the diversity of cultures and cultural expressions.

In the context of the heated debates over the liberalisation of the trade in cultural goods and services in the context of the GATT and GATS, the UNESCO Convention established a balance between the economic and cultural aspects of such goods and services without necessarily imposing any obstacles to the global trade system and relations instituted by the WTO. Indeed, the UNESCO Convention, by taking into account the varying interests and approaches of the American and European negotiators of the GATT and GATS, recognises that “cultural activities, goods and services have both an economic and cultural nature because they convey identities, values and meanings.”⁵³ Given this dual nature, the Convention repeats that cultural goods and services “must (...) not be treated as solely having a commercial value.”⁵⁴ To draw attention to and to compensate for the adverse impacts of market failures on the representation of certain cultures and cultural expressions in the global market, the Convention further emphasises the importance of ensuring the “range of choices” in the market, while also taking the necessary measures to protect the diversity not only of cultural expressions but also of their content, in which cultural identities, values, imagery and memory are interwoven.⁵⁵

Based on these provisions, the UNESCO Convention acknowledges the significance of cultural diversity by elevating it to a defining characteristic of humanity, and advocates for the preservation of cultural diversity as a means of attaining “democracy, tolerance, social justice and mutual respect between peoples and cultures”,⁵⁶ as well as of sustaining progress in social and cultural life. As a prelude to its operational text, it acknowledges the dynamic character of “culture” by

⁵³ Convention on the Protection and Promotion of the Diversity of Cultural Expressions, 2005, Preamble.

⁵⁴ Ibid.

⁵⁵ Ibid, Preamble; Art. 2(7).

⁵⁶ Ibid, Preamble.



explicitly stating that culture “takes diverse forms across time and space.”⁵⁷ It is the plurality of these diverse forms, in which the unique identities and cultural expressions of disparate communities and peoples find representation, that the UNESCO Convention aspires to protect and promote.

Thus justified, the UNESCO Convention aims, in broad terms, to establish a solid foundation to enable “free cultural interactions in a mutually beneficial manner”⁵⁸ and to encourage “balanced cultural exchanges.”⁵⁹ To do so, it adopts a set of principles which include, but are not limited to, respect for human rights and fundamental freedoms, equal dignity and respect for all cultures, sustainable development and equitable access. In this context, it is imperative to refer to the principle of sovereignty, as it counterbalances the GATT and GATS provisions by recognizing the discretion states enjoy to adopt measures and policies to promote and protect cultural diversity within their territory.⁶⁰ These principles are envisaged as governing the legal rights granted to, as well as the positive and negative obligations imposed on, the signatory parties to promote and protect the diversity of cultural expressions at the international, regional and national levels. These provisions complement the economic dimension imputed to cultural goods and services during the WTO-administered negotiations by requiring the signatory parties to comply with the Charter of the United Nations, the general principles of international law, and internationally recognised human rights instruments.⁶¹ Accordingly, the UNESCO Convention encourages the signatory parties to adopt regulatory and policy measures, such as public funding schemes, to establish and support cultural institutions and artists or measures to enable the diversity of broadcasting and theatrical distribution of media.⁶²

As per the European audiovisual sector and the European film industry, Article 12 of the UNESCO Convention shall be given special attention. This provision is dedicated to promoting international cooperation to support the creative process and the sustainability of cultural production. Within this framework, Article 12(e) of the Convention encourages the signatory parties to consider bilateral, regional and international cooperation agreements specific to the co-production and co-distribution of cultural expressions. Shedding light upon another angle of international cooperation in this regard, Article 14 of the Convention encourages the signatory parties to adopt appropriate measures that facilitate collaboration between developed and developing countries to boost the

⁵⁷ Ibid.

⁵⁸ Ibid, Art. 1(a).

⁵⁹ Ibid, Art. 1(c).

⁶⁰ Ibid, Art. 1(h).

⁶¹ Ibid, Art. 2(2).

⁶² Ibid, Art. 2 paras (b), (c), (e).



music and film sectors in the latter territories. Article 16 of the Convention further encourages developed countries to engage in cultural exchanges with developing countries “by granting preferential treatment to artists and other cultural professionals and practitioners, as well as cultural goods and services from developing countries.”⁶³

As one of the major proponents for the adoption of this Convention (Psychogiopoulou, 2012), the Council of the EU approved the UNESCO Convention on behalf of the EU (or the European Community at the time) by dint of Council Decision 2006/515/EC of 18 May 2006.⁶⁴ Following the Council Decision, the Convention was ratified by a cohort of the EU Member States⁶⁵ through to December 2006. At the time of writing, the EU and all EU Member State⁶⁶ have ratified the Convention, which highlights its recognition and the universal principles and rights it encompasses at the Union level.

The values underpinning the UNESCO Convention are reflected in the EU’s policy and legislative framework regarding the European audiovisual sector. This is true of the Union’s flagship audiovisual policy instrument, Directive 2010/13/EU (Audiovisual Media Services Directive, AVMSD), which regulates audiovisual media services within the Union. The AVMSD, as amended, refers to the UNESCO Convention in its Recitals, while also enshrining the values of the Convention in its Recitals and operational text on several occasions. Indeed, Recital 7, while referring to the Union’s opposition to the liberalisation of audiovisual media services in the context of the GATT and GATS, also declares the EU’s commitment to the UNESCO Convention. Recital 5 of the AVMSD underlines the cultural dimension of audiovisual media services in addition to their economic dimension, emphasizing the relevance of audiovisual media services for “freedom of information, diversity of opinion and media pluralism”⁶⁷ in a democratic society. Furthermore, Recital 6 indicates cultural mainstreaming “to respect and to promote the diversity of [the EU’s] cultures”.

⁶³ Ibid, Art. 16.

⁶⁴ Council Decision 2006/515/EC of 18 May 2006 on the conclusion of the Convention on the Protection and Promotion of the Diversity of Cultural Expressions, <http://data.europa.eu/eli/dec/2006/515/oj>.

⁶⁵ The first cohort of EU Member States that ratified the Convention comprised France, Italy, Luxembourg, Denmark, Ireland, Greece, Spain, Austria, Finland, Sweden, Estonia, Cyprus, Latvia, Lithuania, Malta, Slovakia, and Slovenia. Bulgaria, Croatia and Romania also ratified the Convention in 2006, though they did not access to the EU until 2007 (Bulgaria, Romania) and 2013 (Croatia).

⁶⁶ Germany, Greece, Poland and Portugal became signatories of the Convention in 2007; Hungary and Switzerland ratified it in 2008; the Netherlands in 2009, Czechia in 2010 and, last but not least, Belgium in 2013.

⁶⁷ Directive 2010/13/EU of the European Parliament and of the Council of 10 March 2010 on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services (Audiovisual Media Services Directive), recital 5.



1.2.2 Cultural norm-setting at the regional level: European Union & Council of Europe

The UNESCO Convention, with its emphasis on cultural diversity and plurality, can be read in tandem with the experiences and well-established practices of the CoE (Palmer & Merkle, 2012). Cultural cooperation, as enshrined in the UNESCO Convention and including cinematographic co-productions, is a core component of the European Convention on Cinematographic Co-production (1992).

The European Convention on Cinematographic Co-production, adopted by the CoE on 2 October 1992, is an illustration of a first step towards a *positive* rather than a *defensive* construction of European audiovisual policies relevant to the internationalisation of European audiovisual works and film through the creation of a framework to support co-productions among CoE members, which include several non-EU states. Nevertheless, the social, economic and political circumstances that led to the adoption of the CoE Convention of 1992 suggest that this “positive” step was, in fact, an offshoot of the “defensive” mechanisms employed by European states since the 1940s.

As indicated in the Explanatory Report to the Convention, the European cultural scene experienced a decline in cinema attendance in the 1960s and 1970s across Europe, primarily due to the widespread availability of television and a shift in consumer behaviour away from cinema and towards television broadcasts (Council of Europe, 1992). This drop in box-office rates and revenues, which are the main sources of film production financing, was accompanied by an increase in production costs. Having developed as a national endeavour until then, film production could no longer survive by relying on national sources alone (Council of Europe, 1992). The co-production of films, which would allow producers to draw on a bundle of disparate national funding schemes, came to the forefront as a solution to the lack of national funding opportunities. Therefore, the CoE Convention of 1992 was a response to the post-World War II European audiovisual market's needs concerning the financial support envisaged for film production.

The concept of cinematographic co-production emerged in the post-World War II era. Although cinematographic co-productions appeared as an economic solution to an ostensibly economic problem, they were also deemed to be an effective tool for revitalizing European film production overall, given that, at that time, the vast majority of cultural content was being produced by three European countries with strong pre-war film industries: France, Italy and the United Kingdom (Mitric, 2018). Nevertheless, the contribution of these states to the European cinematographic



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scene was insufficient to counterbalance, let alone eradicate, the dominance of American cultural content in the European cultural market. The European states therefore considered intergovernmental cooperation as complementary to import and screen quotas as a means of promoting the European film industry (Mitric, 2018).

Bilateral or multilateral agreements at state level are a prerequisite for international cinematographic co-productions, as the funding states have to agree on the nationality of the cinematographic production. Consolidating the nationality of the production is essential if it is to benefit from tax incentives and national funding schemes, but also to exempt such cultural products from the import and screen quotas in the designated (or funding) states, as per the national treatment principle of the GATT and GATS (Mitric, 2018). Nevertheless, the terms and conditions of such agreements, which are drafted per the national legal framework of each state, risked generating disparate outcomes, including less favourable terms, for the co-producers involved. Following the foundation of Eurimages (the CoE fund for the co-production, distribution and exhibition of European cinematographic works), the standardisation of co-production agreements became essential, as the Eurimages support fund was envisaged for cooperations between at least three CoE members (Council of Europe, 1992; Council of Europe, 2017).

Reflecting on the adverse impacts of the fragmentation of state-funding schemes that could hamper regional cooperation in film production, the CoE Convention of 1992 sought to standardise the national legal frameworks of the CoE members vis-à-vis state support for film production, thereby making regional cooperation easier in the field. The preamble to the Convention justifies encouraging regional co-production in European cinematography on the basis of the European Cultural Convention and on the grounds of ideals concerning a common European cultural heritage, as well as cultural diversity. Acknowledging cinema as an effective tool which encapsulates intellectual “creation and expression of cultural diversity”, the Convention laid the foundations for a harmonised legal framework that would eliminate the legal hurdles hampering the progress of European cinematography.

Limiting its scope to cinematographic works, and thus excluding other audiovisual works, the Convention provides a common definition of “cinematographic works” and establishes a common legal framework to govern bilateral and multilateral co-production agreements entered into for the co-production of cinematographic works among CoE members. Article 3(a) of the Convention defines a cinematographic work as “a work of any length or medium, in particular, cinematographic



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works of fiction, cartoons and documentaries, which complies with the provisions governing the film industry in force in each of the Parties concerned and is intended to be shown in cinemas”.

Subsequently, the Convention **(1)** safeguards the equal treatment of international co-production with national production. Hence, it allows co-productions to benefit from the funding opportunities provided to national productions with national laws and regulations, **(2)** defines the criteria for acknowledging a cinematographic work as a co-production, **(3)** sets the minimum and maximum proportions for contributions from each co-producer, **(4)** identifies the rights of co-producers, **(5)** introduces measures to maintain the balance between the economic interests and investments of co-producing states, and **(6)** sets certain rules to safeguard the promotion of a common European identity (e.g. language of the cinematographic work, its exhibition at film festivals, the credits of co-producing states). For instance, Article 14 of the Convention entitles each co-funding state to request a final version of the work in one of the official languages of that state. Article 15, on the other hand, requires the exhibition of the co-produced cinematographic work at the international film festivals held in the country where the majority producer—or, in the case of equal contributions, the director—is based, unless otherwise agreed by the co-producers.

It is worth noting that, as enshrined in Article 2, the Convention was designed to apply to bilateral co-productions in cases where a co-production agreement has not been concluded between the states concerned, and unless the states have made any reservations to this rule. In other cases where states have entered into a bilateral agreement for this purpose, the terms and conditions of that agreement would take precedence and apply among the contracting parties; however, the Convention overrides multilateral agreements for cinematographic co-productions. All in all, the CoE Convention of 1992 not only provided a solution to the financial straits film producers found themselves in, but it also increased the predictability of the terms and conditions of foreign-state-funding schemes envisioned for cinematographic co-production, hence facilitating the whole financial planning process for film producers of diverse nationalities.

Given the transformation of the European cinematographic scene over time, the Convention of 1992 has since been revised and replaced by a newly adopted text in 2017. Reaffirming its commitment to promoting and protecting cultural diversity, particularly in the context of the role cinematographic works play in achieving such diversity, the Convention of 2017 underscores the significance of cinematography to freedom of expression and democratic values. Furthermore, with a paragraph newly added to Article 5, the 2017 Convention removes certain content from the scope of co-productions eligible for funding. This category comprises “projects of a blatantly



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pornographic nature or those that advocate discrimination, hate or violence or openly offend human dignity.”⁶⁸ Aside from these, the novelties of the revised text are mainly related to technical aspects of the Convention, such as opening accession to the Convention to non-members. Another important element of the CoE Convention of 2017 is its reference to the UNESCO Convention, which is historically tied and intricately related to the Union’s policies and agenda concerning the European audiovisual sector and the European film industry.

That the CoE Convention of 1992 was welcomed by the European Community at the time is clear from its ratification by all European Community Member States by 2003, along with the states that acceded to the EU in the years that followed. The revised text of the CoE Convention has also been broadly recognised and implemented across Europe, with 26 of the 27 EU Member States having signed or ratified the revised text by 2025.⁶⁹ While the revised text has yet to enter into force in Germany, France is the only EU Member State which ratified but denounced the CoE Convention of 1992 and has not signed or ratified the CoE Convention of 2017.

1.3 Conclusion

This section of the study was dedicated to mapping and analysing the global and regional norm-setting forums, specifically the UN and the CoE, which have been influential in, and contributed to, the EU’s legal and policy framework regarding the audiovisual and film sectors. The analysis focused on key international legal instruments—namely the UDCD, the UNESCO Convention and the CoE Conventions of 1992 and 2017—and the broader historical context and realities that led to their adoption.

The social and cultural values inherent in audiovisual and cinematographic content required the EU (in fact, the EEC) and its Member States to take up defensive measures early on in the form of screen quotas and preferential treatment designed to restrict the impact on the European cultural landscape and cinematographic scene of content that does not reflect the communal values and imagery of European societies. The market expectations associated with audiovisual content necessitated the striking of a delicate balance with cultural sensitivity and cultural diversity considerations. Fine-tuning eventually took place under the auspices of the UN and the CoE. Both served as platforms that enabled the negotiating and setting of norms that acknowledged the duality of cultural commodities against the rigidity of the GATT/WTO system and the purely

⁶⁸ CoE Convention of 2017, Art. 5(3).

⁶⁹ For details as of 1/6/2025, see Chart of signatures and ratifications of Treaty 220, <https://www.coe.int/en/web/conventions/full-list?module=signatures-by-treaty&treaty=220>.



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economic perception of audiovisual and cinematographic works. As will be shown in the following sections, such duality is a core element of the Union's approach to European audiovisual works and film in the context of its external policies and financial support schemes.

2. THE AUDIOVISUAL AND FILM IN ECONOMIC AND NON-ECONOMIC AGREEMENTS BETWEEN THE EU AND NON-EU COUNTRIES

This section examines how the audiovisual sector is addressed in international agreements between the EU and third countries, negotiated as part of the Union's exercise of its external competences. It provides a detailed mapping of the economic and non-economic agreements entered into by the Union between the EU and more than 70 countries on a bilateral or regional basis, identifying the chapters, provisions, protocols and annexes that pertain--directly or indirectly--to the audiovisual sector.

The review addresses the following types of economic agreements: (Free) Trade Agreements (FTAs), which may include every aspect related to trade;⁷⁰ Investment Protection Agreements (IPAs), which cover issues relevant to cross-border investments;⁷¹ as well as specific types of EU agreements with third countries in particular geographical areas. These are: Economic Partnership Agreements (EPAs), which are trade and development agreements negotiated between the EU and African, Caribbean and Pacific countries and regions;⁷² Partnership and Cooperation Agreements (PCAs) or Enhanced Partnership Agreements⁷³ with countries subject to the EU's eastern neighbourhood policy; Association Agreements (AAs)⁷⁴ with countries subject to the EU's southern neighbourhood policy and in the case of the "Association Trio", i.e. Ukraine, Moldova, Georgia (Van Elsuwege & Chamon, 2019), plus Türkiye; and the Stabilisation and Association Agreements (SSAs), which are concluded with candidate countries in the Western Balkans as part of the EU Stabilisation and Association Process (SAP) and include provisions for the future EU membership of the countries involved. The review also covers non-economic agreements the EU

⁷⁰ An FTA is a legally binding agreement where the parties agree on certain obligations that affect trade in goods and services with a view to reducing barriers to trade and promoting trade flows between the contracting parties.

⁷¹ An IPA is an agreement executed between two parties with the aim of promoting and protecting investments in the territory of one contracting party made by investors from the other contracting party while furthering the development of both parties.

⁷² EPAs are agreements that, in addition to facilitating trade, pursue a wider range of economic relations in various sectors.

⁷³ PCAs seek to encourage trade and investment while also providing a basis for political dialogue and cooperation between the EU and third countries.

⁷⁴ AAs are comprehensive agreements which establish a long-term legal and institutional framework for cooperation. They are flexible and typically contain three main components: political dialogue, trade liberalisation and sectoral cooperation.



has concluded with third countries, such as Framework Agreements which set the broader framework for bilateral cooperation between the EU and the country concerned and standalone agreements on Cultural Cooperation.

The analysis seeks to identify how the audiovisual sector is addressed in provisions regulating trade and investment, and in provisions making arrangements for cooperation between the EU and the countries or regions involved across the aforementioned agreements. Regarding trade-related provisions, the analysis is carried out by identifying relevant provisions in the EU's agreements against the backdrop of core WTO obligations and rules, especially under the GATS, such as the MFN principle, the NT obligation and Market Access in trade and services. As discussed in the previous section, the MFN principle requires parties not to discriminate among their trading partners,⁷⁵ while the principle of NT prohibits discrimination between domestic and foreign services or service suppliers.⁷⁶ Market Access entails a general prohibition restricting the delivery of foreign services and the entry of foreign service suppliers into one's own market, but is conditional on undertaking specific commitments in specific sectors with regard to four different modes of supply⁷⁷ and can also be subject to limitations.⁷⁸ As is well known, the EU has sought, within the WTO, to develop a liberalisation formula that respects Member States' freedom to implement cultural policies, and this has resulted in no commitments across all modes of supply of audiovisual services, along with certain MFN exemptions being tabled.⁷⁹ With respect to cooperation provisions, the review considers both general cultural cooperation clauses and those specifically addressing audiovisual cooperation, as well as other relevant provisions, especially in the field of information and communication.

2.1 Developing countries

This section identifies the provisions addressing the audiovisual that are included in EPAs, AAs, PCAs, IPAs and FTAs that have been negotiated between the EU and developing countries. In this context, it also examines the EU's efforts to address audiovisual cooperation through the inclusion of audiovisual cooperation provisions in protocols and self-standing agreements on "cultural cooperation" attached to—or negotiated in tandem with—trade and other economic agreements.

⁷⁵ GATS Art. II.

⁷⁶ GATS Art. XVII.

⁷⁷ These are: cross-border supply (mode 1); consumption abroad (mode 2); commercial presence (mode 3); presence of natural persons (mode 4).

⁷⁸ GATS Art XVI.

⁷⁹ For the EU List of MFN Exemptions regarding audiovisual services, see European Communities and the Member States, Final List of Article II (MFN) Exemptions, GATS/EL/31, 15 April 1994, <https://docs.wto.org/dol2fe/Pages/SS/directdoc.aspx?filename=Q:/SCHD/GATS-EL/EL31.pdf&Open=True>.



The analysis covers provisions on the audiovisual included in agreements concluded with the Cariforum (Caribbean) countries, member countries of the Andean Community, Central American countries and Vietnam in Asia. The focus is on provisions addressing the audiovisual either specifically or within the broader cultural sector. The analysis is structured per regional groupings and per country under study. A separate sub-section covers goods-only EPAs between the EU and the African, Caribbean and Pacific states.

2.1.1 Cariforum

The EU has a long-standing record of economic and cultural relations with developing countries of the African, Caribbean and Pacific (ACP) group of states. Trade relations with the ACP have occupied an important place on the EU trade agenda since the Treaty of Rome. This established close trade relations between the founding Member States of the EEC and their then and former colonies, also known as Overseas Countries and Territories (OCTs).⁸⁰ The Yaoundé conventions (1963, 1969) continued trade relations between the EEC and the African and Malagasy Associated Communities by granting the latter non-reciprocal trade preferences. Following the United Kingdom's accession to the EEC, the Lomé Convention (1975) included the (English-speaking) ACP countries in trade relations with the EEC. The unilateral preferential trade regime established towards the ACP countries changed to become WTO-compatible with the Cotonou agreement (2000).⁸¹ Under the new arrangement, the parties agreed to negotiate EPAs that would gradually liberalise trade in a reciprocal manner.⁸²

Since 2008, when the first regional EPA was signed between the EU and the Cariforum (Caribbean) states,⁸³ several regional and bilateral EPAs with ACP countries have been concluded.⁸⁴ In line with the EU's 'audiovisual exception' approach, none of these EPAs provide for the liberalisation of trade in audiovisual services between the respective parties. They do,

⁸⁰ Treaty Establishing the European Community, part IV, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A11957E%2FTXT>.

⁸¹ Partnership agreement between the members of the African, Caribbean and Pacific Group of States, of the one part, and the European Community and its Member States, of the other part, signed in Cotonou on 23 June 2000, OJ L 317, 15.12.2000, p. 3.

⁸² Cotonou Agreement, Art. 36(1). The least-developed ACP countries could, under certain conditions, still get preferential access to the EU market through the Generalised System of Preferences. See Regulation 978/2012 of the European Parliament and of the Council of 25 October 2012 applying a scheme of generalised tariff preferences and repealing Council Regulation (EC) No 732/2008, OJ L 303, 31.10.2012, p. 1.

⁸³ These are: Antigua and Barbuda, Bahamas, Barbados, Belize, the Dominican Republic, Grenada, Guyana, Haiti, Jamaica, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Suriname, Trinidad and Tobago.

⁸⁴ Note that, since the end of 2023, framework relations between the EU and the ACP have been governed by the OACPS-EU Partnership Agreement, also known as the Samoa Agreement. See Partnership Agreement between the European Union and its Member States, of the one part, and the Members of the Organisation of African, Caribbean and Pacific States, of the other part, OJ L 2862, 28.12.2023, p. 1.



however, provide for cultural cooperation between the EU and ACP countries, including in the audiovisual sector. The framework for such cooperation was established with the Cotonou Agreement, which took into account existing cultural ties and exchanges shaped by the colonial past, and was grounded in a development-oriented approach for the ACP countries.⁸⁵ However, the main impetus for the inclusion of provisions on cultural and audiovisual cooperation in the agreements concluded with the developing countries came from the European Commission, which sought to overcome the long-entrenched tension between culture and trade by implementing the 2005 UNESCO Convention (Richieri Hanania, 2012). One key provision in this respect is found in Article 16 of the UNESCO Convention, which considers imbalances in the circulation of cultural goods and services and calls on developed countries accordingly to “facilitate cultural exchanges with developing countries by granting [...] preferential treatment to artists and other cultural professionals and practitioners, as well as cultural goods and services from developing countries”.

The EPA between the EU and the Cariforum states was signed in October 2008 and entered into force in November of the same year.⁸⁶ The agreement covers trade in goods and includes commitments on trade in services, investment, and trade-related issues such as competition policy, government procurement and intellectual property rights, following the typical positive list approach. It foresees asymmetries in favour of the Cariforum countries,⁸⁷ and also covers sustainable development aspects.

The EU-Cariforum EPA adheres to the “audiovisual exception” regarding market access and NT in relation to the cross-border supply of services and commercial presence.⁸⁸ Thus, none of the parties undertake market access and NT commitments in the audiovisual sector. The former would entail that the parties would allow suppliers of audiovisual services or investors of the other party to have access to their domestic services market, without restrictions. The latter would entail that

⁸⁵ Art. 27 of the Cotonou agreement stipulated that cooperation in the area of culture shall aim at: (a) integrating the cultural dimension at all levels of development cooperation; (b) recognising, preserving and promoting cultural values and identities to enable intercultural dialogue; (c) recognising, preserving and promoting the value of cultural heritage; supporting the development of capacity in this sector; (d) developing cultural industries and enhancing market access opportunities for cultural goods and services; (e) recognising and supporting the role of cultural actors and cultural networks, and their contribution to sustainable development; and (f) promoting the cultural dimension in education and the participation of youth in cultural activities.

⁸⁶ Council Decision 2008/805/EC of 15 July 2008 on the signature and provisional application of the Economic Partnership Agreement between the Cariforum states, of the one part, and the European Community and its Member States, of the other part, OJ L 289, 30.10.2008, p. 1; Economic Partnership Agreement between the Cariforum states, of the one part, and the European Community and its Member States, of the other part, OJ L 289, 30.10.2008, p. 3.

⁸⁷ Such as the exclusion of sensitive products from liberalisation and long liberalisation periods.

⁸⁸ EU-Cariforum EPA, Art. 66. Note that commitments on commercial presence mean that a service is supplied through the establishment of a service provider in the country where the service is provided, while cross-border supply of services is defined as the supply of a service from the territory of a party into the territory of the other party (mode 1) and the supply of a service in the territory of a party to a service consumer of the other party (mode 2).



audiovisual services and the service suppliers of the other party would be granted treatment no less favourable than that accorded to like national services and service suppliers.

At the same time, non-reciprocal concessions are offered to cultural services of the Cariforum countries, excepting the audiovisual, with a development mindset. Several EU Member States make commitments granting market access to Cariforum providers of cultural services, such as libraries, archives and museums, through commercial presence and cross-border supply.⁸⁹ Similar commitments are made with regard to the provision of entertainment services other than broadcasting: namely, services like theatre, live bands, circus and discotheque.⁹⁰ Commitments are also made on behalf of EU Member States for the granting of quota-free temporary access to foreign entertainers, artists and other cultural practitioners to provide entertainment services as “contractual service suppliers”.⁹¹

Culture and the audiovisual are specifically dealt with under the Protocol on Cultural Cooperation (PCC) annexed to the EU-Cariforum EPA. A new instrument at the time of its adoption, the PCC was meant to promote the principles of the UNESCO Convention and to implement its provisions within the context of trade and economic agreements of a bilateral or regional nature, while strengthening the cultural dimension of the EU’s external relations (Souyri-Desrosier, 2014: 214). This was an approach aligned with the Commission’s Communication on an EU Cultural Agenda, which sought to strengthen the Union’s action in the field of culture, including as part of its international relations.⁹² The EU-Cariforum PCC was based on a draft model text prepared by the Commission shortly after the entry into force of the UNESCO Convention to serve as a basis for future and ongoing trade negotiations, while remaining flexible to take into account the level of cultural exchanges between the EU and the third countries concerned and other specificities (Psychogiopoulou, 2014b: 74). It set a framework for reinforcing and facilitating cultural cooperation, including in the audiovisual sector, without undermining the EU’s position on the exclusion of audiovisual services from the scope of the trade agreements concluded with third countries (Ibid: 72).

⁸⁹ EU-Cariforum EPA, Annex IV A and B.

⁹⁰ Ibid.

⁹¹ With the exception of Belgium. See EU-Cariforum EPA, Art. 83. These are employees of a Caribbean company which has no commercial presence or permanent office in the EU but does have a contract to supply services in an EU Member State, and which requires its employees to enter an EU country on a temporary basis to fulfil this contract. Although such access may be subject to qualification requirements and economic needs tests (ENTs), it marks an important step in the granting of EU access for the temporary entry of foreign cultural professionals (Burri, 2024: 252-253), and thus has a developmental potential for the Cariforum local cultural industries.

⁹² On the Protocols on Cultural Cooperation, see Richieri Hanania, 2012; Loisen, 2014; and Psychogiopoulou, 2014b, among others



The EU-Cariforum PCC opens by mentioning the intention of the parties to implement the UNESCO Convention effectively and to cooperate within the framework of its implementation. It also refers to the cultural, economic and social value of the cultural industries and their special role in fostering greater cultural diversity, exchange and dialogue between the two regions. A concrete expression of these principles in the PCC is the reference to Article 14 (cooperation for development) and Article 15 (modalities for partnerships) of the UNESCO Convention. Mention is also made of Article 27 (on culture and development) of the Cotonou Agreement. The reference made to Article 16 of the UNESCO Convention (preferential treatment for development countries) similarly reflects the link between cultural cooperation and development. Article 1 of the PCC cautiously states that the provisions of the PCC are “without prejudice to the other provisions of this agreement” and should thus not be seen as creating any trade commitments (Psychogiopoulou, 2014b: 73).

The EU-Cariforum PCC contains horizontal provisions on cultural cooperation in all cultural sectors⁹³ and sectoral provisions which address cooperation in specific sectors, including the audiovisual and cinematography.⁹⁴ The horizontal provisions cover several elements that could help enhance cultural cooperation, including audiovisual cooperation. They provide for the exchange of cultural goods and services, including through preferential treatment, and the exchange of information on cultural and audiovisual matters.⁹⁵ They also facilitate the entry and temporary stay of artists and cultural professionals and practitioners from the other party.⁹⁶ Horizontal provisions further foresee the provision of technical assistance to the Cariforum parties to support the development of their cultural industries,⁹⁷ in line with the objective of implementing Article 16 of the UNESCO Convention.

The sectoral provisions on the audiovisual address various forms of cooperation. They lay down the parties' commitment to encouraging the negotiation of new co-production agreements and the

⁹³ EU-Cariforum PCC, Arts 2-4.

⁹⁴ Ibid, Arts 5-9. Besides the audiovisual (Arts 5 and 6), sectoral provisions address performing arts (Art. 7), publications (Art. 8), and the protection of sites and historic monuments (Art. 9).

⁹⁵ EU-Cariforum PCC, Art. 2.

⁹⁶ Ibid, Art. 3. These are defined as natural persons that perform and manage cultural activities, produce cultural goods or supply cultural services and include (a) artists, actors, technicians and other cultural professionals and practitioners from the other party involved in the shooting of cinematographic films or television programmes, or (b) artists and other cultural professionals and practitioners such as visual, plastic and performing artists and instructors, composers, authors, providers of entertainment services and other similar professionals and practitioners from the other party involved in cultural activities such as, for example, the recording of music or contributing an active part to cultural events such as literary fairs, festivals, among other activities (Article 3(1a-b)). Article 3(3) specifies that entry into and temporary stay in the territories of the EC party or of the Signatory CARIFORUM states, shall be for a period of up to 90 days in any twelve-month period.

⁹⁷ Ibid, Art. 4. Such assistance may take, inter alia, the form of training, advice on the elaboration of policies and legislation, and the transfer of technologies.



implementation of existing ones,⁹⁸ and to facilitating the access of co-produced works to their respective markets. Among the means to be used for this purpose, the PCC lists the organisation of festivals and seminars, as well as the granting of preferential treatment.⁹⁹ A concrete implementation of such preferential treatment is foreseen in the form of access to the European audiovisual market for co-productions between the two regions that fulfil certain conditions, through the “European works” promotion and quota provisions established under the Audiovisual Media Services Directive (AVMSD).¹⁰⁰ At the time, the AVMSD required TV broadcasters to reserve a majority of their transmission time for European works.¹⁰¹ With the 2018 revision of the AVMSD, a mandatory 30% quota of European works was *inter alia* introduced for providers of non-linear audiovisual media services operating in the EU market.¹⁰² That access is granted through the PCC, and not through the EPA, is explained by the fact that not all Cariforum states could establish a preferential trade relation with the EU in the audiovisual, due to commitments undertaken under the GATS in this sector (Richieri Hanania, 2019: 575). By attaching the PCC to a regional trade agreement, it was made possible for those countries to enter into a preferential relationship through Article V of the GATS, according to which, under certain conditions, economic integration agreements may be withdrawn from MFN treatment obligations (Richieri Hanania, 2019: 575).

The PCC’s provisions on audiovisual cooperation are not limited to co-productions. They also provide other opportunities for collaboration, which include cooperation to ensure the interoperability of audiovisual technologies and the use of international and regional standards,¹⁰³ facilitating the rental and leasing of the material and equipment necessary for the shooting of audiovisual works,¹⁰⁴ and supporting the digitalisation of audiovisual archives in the participating Cariforum States.¹⁰⁵ Moreover, they establish that parties shall promote the EU and the Cariforum as locations for shooting cinematographic films and television programmes, and allow the

⁹⁸ Ibid, Art. 5(1).

⁹⁹ Ibid, Art. 5(2).

¹⁰⁰ Ibid, Article 5(2)(a). On European works and their promotion, see Arts 13, 16 and 17 of Directive 2010/13/EU of 10 March 2010 on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services (Audiovisual Media Services Directive) (codified version), OJ L 095, 15.4.2010, p. 1.

¹⁰¹ AVMSD, Art. 16.

¹⁰² Directive (EU) 2018/1808 of 14 November 2018 amending Directive 2010/13/EU on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services (Audiovisual Media Services Directive) in the light of changing market realities, OJ L 303, 28.11.2018, p. 69. Pursuant to Article 13(1) thereof, on-demand audiovisual service providers are also mandated to ensure the prominence of those works. For a discussion, see Farchy, Bideau and Tallec (2021).

¹⁰³ EU-Cariforum PCC, Art. 5(3).

¹⁰⁴ Ibid, Art. 5(4).

¹⁰⁵ Ibid, Art. 5(5).



temporary importation of technical material and equipment from the other party to carry out the shooting.¹⁰⁶

2.1.2 Colombia, Peru and Ecuador

The TA between the EU, Colombia and Peru was signed in 2012.¹⁰⁷ The TA, which entered into force on 1 November 2012, had been provisionally applied with Peru since March 2013 and with Colombia since August 2013. Ecuador joined the agreement in 2016.¹⁰⁸ This TA follows the positive list approach and typically also provides for the explicit exclusion of audiovisual services from trade commitments.¹⁰⁹ Measures affecting broadcasting services are also explicitly excluded from the scope of the section on telecommunication services.¹¹⁰ At the same time, concessions are made by all parties with regard to market access and the cross-border supply of services for entertainment services other than the audiovisual.¹¹¹

In tandem with the TA, the EU, Colombia and Peru negotiated a stand-alone agreement focused on cultural cooperation, which was signed in 2011.¹¹² The Commission's 2007 "argumentaire" on the negotiation of PCCs had suggested placing audiovisual cooperation provisions within specific titles of EU trade agreements with a view to ensuring that the audiovisual sector is not covered by the trade provisions in the services and establishment title of the agreements, while taking care to underline in the text of the PCCs that the parties "maintain their capacity to elaborate and further develop their public cultural policies with a view to protecting and promoting cultural diversity".¹¹³ Still, the EU-Colombia and Peru Cultural Cooperation Agreement (CCA) was not annexed to the TA, so as to more clearly establish its autonomy from trade issues—a position that was clearly influenced by a 2009 French Communication on EU foreign cultural policy (French Republic, 2009) which called for ensuring that the procedure and timetable for negotiating protocols is independent of the timetable governing the trade agreement (Souyri-Desrosier, 2014: 213). The CCA meant to

¹⁰⁶ Ibid, Art. 6(1)-(2).

¹⁰⁷ Council Decision (EU) 2012/735 of 31 May 2012 on the signing, on behalf of the Union, and provisional application of the Trade Agreement between the European Union and its Member States, of the one part, and Colombia and Peru, of the other part, OJ L 354, 21.12.2012, p. 1; Trade Agreement between the European Union and its Member States, of the one part, and Colombia and Peru, of the other part, OJ L 354, 21.12.2012, p. 3.

¹⁰⁸ Protocol of Accession to the Trade Agreement between the European Union and its Member States, of the one part, and Colombia and Peru, of the other part, to take account of the accession of Ecuador, OJ L 356, 24.12.2016, p. 3.

¹⁰⁹ EU-Colombia, Peru and Ecuador TA, Arts 111 and 118.

¹¹⁰ Ibid, Art. 139.

¹¹¹ Ibid, Annex VII.

¹¹² Agreement on cultural cooperation between the European Union and its Member States, of the one part, and Colombia and Peru, of the other part, available at: https://ec.europa.eu/assets/eac/culture/policy/strategic-framework/documents/agreement-cultural-colombia-peru_en.pdf.

¹¹³ European Commission, Argumentaire on the Title on Cultural Cooperation in future EU trade agreements, 11 May 2007 (on file with the authors).



implement the UNESCO Convention, and thus its entry into force was subject to the ratification of the UNESCO Convention by Colombia.¹¹⁴ Indeed, the Convention is mentioned in the CCA's preamble and constitutes the reference for all definitions and concepts used.¹¹⁵ Moreover, the preamble states the intention of the parties to cooperate within the framework of the implementation of the UNESCO Convention, particularly Articles 14, 15 and 16, while noting “the multi-faceted nature of cultural goods and services as activities of cultural, economic and social value.”

Like the EU-Cariforum PCC, the CCA with Peru and Colombia addresses cooperation aimed at facilitating exchanges of cultural activities, goods and services, including in the audiovisual sector.¹¹⁶ The CCA's horizontal provisions, which are applicable to all cultural sectors, are also quasi-identical to those laid down in the EU-Cariforum PCC. They state the parties' commitment to enhance exchange opportunities for their cultural goods and services, including through preferential treatment,¹¹⁷ to exchange information on intellectual property rights,¹¹⁸ and to facilitate the entry and temporary stay of artists and cultural professionals and practitioners under certain conditions.¹¹⁹

The CCA also establishes sectoral provisions for cooperation in the audiovisual sector, including cinematography.¹²⁰ In this case too, sectoral provisions stipulate that the parties shall endeavour to promote their respective territory as a shooting location¹²¹ and to exchange best practices in the preservation and digitalisation of audiovisual archives, including through cooperation between their cinemathèques.¹²² Co-productions between the parties are also covered. Parties state their commitment to promote the negotiation of new co-production agreements between them, to implement existing agreements,¹²³ and to facilitate access for such co-produced works to their respective markets, including through the organisation of festivals, seminars and other similar initiatives.¹²⁴ These provisions have the potential to enhance the visibility and presence of

¹¹⁴ Colombia acceded to the UNESCO Convention in October 2013.

¹¹⁵ EU-Colombia and Peru CCA, Art. 2(2).

¹¹⁶ Ibid, Art. 1.

¹¹⁷ Ibid, Art. 1.

¹¹⁸ Ibid, Art. 3(3).

¹¹⁹ Ibid, Art. 5. Compared with the EU-CARIFORUM PCC, the CCA contains a more extensive list of the types of artists and cultural practitioners that may benefit from such increased contacts; they include journalists specialised in cultural issues, personnel involved in the creative aspects of publishing, cultural managers, individuals engaging in the development of cultural policies, and cultural researchers.

¹²⁰ Ibid, Art. 7. The CCA also addresses cooperation in the performing arts (Art. 8), publishing (Art. 9) and the protection of cultural heritage (Art. 10).

¹²¹ Ibid, Art. 7(4).

¹²² Ibid, Art. 7(5).

¹²³ Ibid, Art. 7(1).

¹²⁴ Ibid, Art. 7(2).



European co-produced films in the Colombian and Peruvian markets and vice-versa. However, no preferential treatment by means of the AVMSD is provided for EU-Peruvian and EU-Colombian co-productions as European works. This absence reflects the EU's position, outlined in the 2007 "argumentaire", that preferential treatment should depend on the level of development of the audiovisual industries of the third countries involved.¹²⁵ Concerns that preferential treatment could have negative effects on European companies involved in the production of television programmes may also have played a role, given the strength of the Colombian industry in this field (Loisen & De Ville, 2011: 264).

Finally, the CCA provides for the establishment of a Committee on Cultural Cooperation, composed of experts from the administration, to oversee the implementation of the CCA.¹²⁶ This is another difference from the EU-Cariforum PCC, which does not explicitly differentiate cultural from trade disputes through different committee structures, and serves to make clear that the monitoring of CCA implementation is entrusted to a body with the appropriate expertise. The tasks of the committee shall range from evaluating the results of the application of the CCA, and in particular the development of economic relations between the parties, to facilitating the participation of, and consultation with regard to, cultural representatives in its implementation.

2.1.3 Central America

The AA between the EU and six countries of Central America (CA) (Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua and Panama) was signed in 2012 with the aim to establish the legal framework for EU-Central American relations.¹²⁷ It consists of three pillars: trade, political dialogue, and cooperation. The trade pillar has been provisionally applied since 2013, pending ratification by EU Member States. It entered into force in 2024.

The trade pillar replaces unilateral preferential access to the EU market, which was previously granted to the CA countries under the EU's General Scheme of Preferences (GSP).¹²⁸ It regulates

¹²⁵ This was another of the proposals made by France (French Republic, 2009). The position was reiterated in the Commission's concept paper concerning the EU-Korea cultural cooperation protocol (on file with the authors), on which see below.

¹²⁶ EU-Colombia and Peru CCA, Art. 4.

¹²⁷ Council Decision (EU) 2020/2234 of 25 June 2012 on the signing, on behalf of the European Union, of the Agreement establishing an Association between the European Union and its Member States, on the one hand, and Central America on the other, and the provisional application of Part IV thereof concerning trade matters, OJ L 346, 15.12.2012, p. 1; Agreement establishing an Association between the European Union and its Member States, on the one hand, and Central America on the other, OJ L 346, 15.12.2012, p.3. Part IV of the AA (on trade matters) has been applied on a provisional basis between the EU and Costa Rica and between the EU and El Salvador since 1.10.2013. It has been provisionally applied between the EU and Nicaragua; Honduras; and Panama since 1.8.2013.

¹²⁸ For a presentation of the EU General Scheme of Preferences, see UNCTAD (2022).



trade in goods, including through preferential tariffs and quotas addressing structural asymmetries between the two regions. It also covers intellectual property, government procurement and trade in services. Audiovisual services are customarily explicitly excluded from service liberalisation. More specifically, none of the parties undertake market access and national treatment commitments in the audiovisual sector in relation to the cross-border supply of services¹²⁹ and establishment.¹³⁰ Broadcasting is also explicitly excluded from the scope of the provisions on telecommunications.¹³¹ Some liberalisation is nonetheless foreseen for the supply of entertainment services other than the audiovisual, with concessions made by some EU Member States.¹³²

The audiovisual sector is exclusively addressed in the cooperation pillar of the AA through a specific article on “cultural and audiovisual cooperation”.¹³³ This states the commitment of the signatories to establish cooperation in the cultural field through balanced cultural exchanges and the circulation of cultural activities, goods and services as well as of artists and cultural professionals,¹³⁴ and to encourage intercultural dialogue between individuals, cultural institutions and civil society organisations.¹³⁵ Moreover, audiovisual cooperation shall be promoted through joint initiatives in training and audiovisual development, production and distribution activities,¹³⁶ also covering the media sector, including radio and the press.¹³⁷

The above provisions are complemented by a Protocol on “Cultural and Audiovisual Cooperation” that is attached to the cooperation pillar.¹³⁸ The entry into force of this Protocol is made subject to the ratification of the UNESCO Convention by the CA participating countries.¹³⁹ The preamble to the Protocol stipulates the intention of the parties to implement the Convention and to cooperate within the framework of its implementation by developing actions in line with its provisions, notably Articles 14, 15 and 16. The implementation of the Protocol is assigned to the “Cooperation Sub-committee”.¹⁴⁰ This is the body that is tasked with monitoring the entire cooperation section of the EU-CA AA and is independent from trade disputes.¹⁴¹

¹²⁹ EU-CA AA, Art. 169.

¹³⁰ Ibid, Art. 163.

¹³¹ Ibid, Art. 185.

¹³² Ibid, Annex X.

¹³³ Ibid, Art. 74.

¹³⁴ Ibid, Art. 74(1).

¹³⁵ Ibid, Art. 74(2).

¹³⁶ Ibid, Art. 74(4).

¹³⁷ Ibid, Art. 74(6).

¹³⁸ Ibid, Art. 74(7).

¹³⁹ EU-CA Protocol, Art. 9.

¹⁴⁰ Ibid, Art. 8(7).

¹⁴¹ EU-CA AA, Art. 8(7). When dealing with the implementation of the Protocol, the Cooperation Sub-Committee shall consist of officials with “competence in cultural matters and practices” (see the preamble to the EU-CA Protocol).



The EU-CA Protocol aims to facilitate exchanges in cultural activities, goods, and services. Similar to the EU-Cariforum PCC and the CCA with Colombia and Peru, it foresees both horizontal and sectoral provisions.¹⁴² Here, too, the horizontal provisions address cooperation through exchanges for cultural goods and services, including through preferential treatment, and through the mobility of artists and other cultural professionals and practitioners.¹⁴³ Additionally, the Protocol outlines the provision of technical assistance, such as training, to support the CA signatories in developing their cultural industries.¹⁴⁴ Regarding audiovisual and cinematographic cooperation, the sectoral provisions outline the parties' commitment to encourage the negotiation of new—and the implementation of existing—co-production agreements between one or several EU Member States and one or several of the signatory CA countries.¹⁴⁵ Additionally, the parties pledge to facilitate the access of co-produced works to their respective markets, including through the organisation of festivals, seminars, and similar initiatives.¹⁴⁶ Thus, the treatment of co-productions mirrors that in the CCA with Peru and Colombia, in so far as preferential treatment through market access for co-productions qualified as European works under the AVMSD is not foreseen. The Protocol's provisions on audiovisual cooperation further stipulate that the parties shall promote their respective territories as locations for the filming of audiovisual works¹⁴⁷ and shall facilitate the temporary importation or admission of the necessary technical material.¹⁴⁸

2.1.4 Vietnam

The EU-Vietnam Comprehensive PCA was signed in 2012 and entered into force in 2017.¹⁴⁹ Replacing a PCA signed in 1996,¹⁵⁰ it sets the framework of cooperation and legal relations between the two parties. The agreement is structured into titles, each addressing distinct areas of

¹⁴² Besides audiovisual cooperation, sectoral provisions address the performing arts (Art. 6), publications (Art. 7), and protection of sites and historic monuments (Art. 8).

¹⁴³ Art. 3 of the EU-CA Protocol states that parties shall facilitate, in conformity with their respective domestic legislations, the entry and temporary stay of artists and other cultural professionals and practitioners from the other party involved in the shooting of cinematographic films or TV programmes, without specifying the permissible length of the stay.

¹⁴⁴ EU-CA Protocol, Art. 4.

¹⁴⁵ Ibid, Art. 5(1).

¹⁴⁶ Ibid, Art. 5(2).

¹⁴⁷ Ibid, Art. 5(3).

¹⁴⁸ Ibid, Art. 5(4).

¹⁴⁹ Council Decision (EU) 2012/279 of 14 May 2012 on the signing, on behalf of the Union, of the Framework Agreement on Comprehensive Partnership and Cooperation between the European Union and its Member States, of the one part, and the Socialist Republic of Vietnam, of the other part, OJ L 137, 26.5.2012, p. 1; Framework Agreement on Comprehensive Partnership and Cooperation between the European Union and its Member States, of the one part, and the Socialist Republic of Vietnam, of the other part, OJ L 329, 3.12.2016, p. 8.

¹⁵⁰ Council Decision 96/351/EC of 14 May 1996 concerning the conclusion of the Cooperation Agreement between the European Community and the Socialist Republic of Vietnam, OJ L 136, 7.6.1996, p. 28.



cooperation: development cooperation; peace and security; trade and investment issues; justice and socio-economic development.

Culture and the audiovisual are identified as areas of cooperation within the title on socio-economic development.¹⁵¹ This title includes an article on “culture” which outlines the parties’ agreement to foster cultural cooperation aimed at enhancing mutual understanding and knowledge of their respective cultures.¹⁵² Moreover, the parties agree to collaborate in relevant international forums, such as UNESCO; to advance shared objectives; and to promote the ratification—and strengthen the implementation—of the UNESCO Convention.¹⁵³ Additionally, the article on “culture” stipulates that the parties shall promote cultural exchanges and joint initiatives and support cooperation activities between their cultural institutions.¹⁵⁴ The title on socio-economic development also encompasses an article on “cooperation on information and communication technologies”. This affirms that the parties shall exchange perspectives on their respective policies in this domain,¹⁵⁵ with emphasis on facilitating collaboration between their institutions and agents in the audiovisual and media sectors.

The EU-Vietnam FTA was signed in June 2019 and entered into force in August 2020.¹⁵⁶ It is accompanied by an IPA which, at the time of writing, is in the process of being ratified by the EU Member States.¹⁵⁷ The audiovisual exception is adhered to in this FTA, too. Audiovisual services are explicitly excluded from the scope of provisions on investment¹⁵⁸ and the cross-border supply of services.¹⁵⁹ However, the FTA goes on to provide specific exceptions on NT for investments in favour of Vietnam, allowing it to adopt or maintain measures with respect to the operation of enterprises in radio and television broadcasting as well as the production, distribution, and projection of television programmes and cinematographic works.¹⁶⁰ Since the audiovisual sector is

¹⁵¹ EU-Vietnam PCA, Title VI.

¹⁵² Ibid, Art. 38(1).

¹⁵³ Ibid, Art. 38(3).

¹⁵⁴ Ibid, Art. 38(2).

¹⁵⁵ Ibid, Art. 40(1)(i).

¹⁵⁶ Council Decision (EU) 2019/753 of 30 March 2020 on the conclusion of the Free Trade Agreement between the European Union and the Socialist Republic of Vietnam, OJ L 186, 12.6.2020, p. 1; Free Trade Agreement between the European Union and the Socialist Republic of Vietnam, OJ L 186, 12.6.2020, p. 3.

¹⁵⁷ Proposal for a Council Decision on the signing, on behalf of the European Union, of the Investment Protection Agreement between the European Union and its Member States, of the one part, and the Socialist Republic of Vietnam, of the other part, COM(2018) 694 final. Whereas the FTA covers exclusive EU competences, the IPA covers shared competences (such as investor-state dispute settlement mechanisms), and must thus also be ratified by the Member States.

¹⁵⁸ EU-Vietnam FTA, Art. 8.3(2)(a).

¹⁵⁹ Ibid, Art. 8.9(a).

¹⁶⁰ Ibid, Annex 8-C, Art.1 (a)(b) and (c).



excluded altogether from the scope of investment provisions, these reservations are devoid of meaning and redundant.

The FTA also contains rules on the commercial activity of “state-owned enterprises (SOEs), enterprises granted special rights or privileges, and designated monopolies” from the scope of which the audiovisual sector is not explicitly excluded.¹⁶¹ Yet, the sector is excluded from the provisions on non-discrimination requiring SOEs to make commercial purchases and sales on the basis of commercial considerations.¹⁶² At the same time, the rules on transparency, which aim at ensuring that the commercial activities of SOEs are conducted in an open and accountable manner, do apply to the audiovisual, but only to the EU party because Vietnam has a reservation.¹⁶³ Hence, Vietnamese SOEs, which play an important role in the domestic audiovisual market, given that private broadcasters are not permitted to operate (Mendel, 2010), are not affected by these provisions.

Considering the above, it is evident that the EU-Vietnam FTA keeps the audiovisual sector firmly away from trade liberalisation. It attests to the specific nature of audiovisual services, with matters pertaining to the audiovisual being addressed exclusively within the framework PCA between the two parties. At the same time, cultural considerations are present in the subsidy provisions of the FTA's chapter on competition policy. Specifically, these foresee that subsidies shall only be permitted where they are necessary to achieve a public policy objective, with the promotion of culture listed as such an objective. Reproducing verbatim Article 107(3)(d) TFEU concerning state aid to promote culture, this provision emphasises the potential for intervention in favour of cultural diversity (Chochorelou, 2019: 243).

2.1.5 Goods-only economic partnership agreements between the EU and the ACP

In addition to the aforementioned EPAs, TAs and FTAs covering trade in services, the EU has also concluded goods-only EPAs with the ACP group of states. EPAs with African countries include the EPA between the EU and the Southern African Development Community (SADC) group of

¹⁶¹ Ibid, Chapter 11.

¹⁶² Ibid, Art 11.4.4.

¹⁶³ Vietnam's state-owned enterprises which engage in the sale and purchase of audiovisual productions and distribution services, as well as those which engage in printing, publishing and mass-communication activities, are excluded from the scope of the provisions on SOEs. Ibid, Art. 11.2 and Annex 11, Art. 5.7.



countries;¹⁶⁴ the interim EPA between the EU and six countries in Eastern and Southern Africa;¹⁶⁵ and the Stepping Stone EPAs between the EU and Côte d'Ivoire¹⁶⁶ and between the EU and Ghana,¹⁶⁷ which are intended to provide an initial basis for a regional EPA between the EU and West Africa. In the Pacific, the EU has concluded an Interim EPA with Fiji, Papua New Guinea, Samoa and the Solomon Islands.¹⁶⁸ These EPAs provide inter alia for the elimination of tariffs and quotas on imports of goods from the African and Pacific countries into the EU and for the gradual liberalisation of EU exports. While the agreements provide for the gradual liberalisation of EU exports of specific cultural goods--such as printed books, newspapers and jewellery--there are no dedicated provisions for audiovisual goods. Only the EU-SADC includes a provision concerning the audiovisual sector; it allows the parties to introduce or maintain screen quotas.¹⁶⁹

2.2 Developed countries

Over the last twenty years, the EU's trade policy towards industrialised countries has changed considerably. From a historical perspective, the change is evident in the main documents that have guided the EU's trade policy with developed countries, such as the 2006 Global Europe strategy,¹⁷⁰

¹⁶⁴ Council Decision 2016/1623/EC of 1 June 2016 on the signing and provisional application of the Economic Partnership Agreement between the European Union and its Member States, of the one part, and the SADC EPA states, of the other part, OJ L 250, 16.9.2016, p. 1; Economic Partnership Agreement between the European Union and its Member States, of the one part, and the SADC EPA States, of the other part, OJ L 250, 16.9.2016, p. 3. The SADC group comprises Botswana, Lesotho, Mozambique, Namibia, South Africa and Eswatini.

¹⁶⁵ Council Decision 2012/196/EC of 13 July 2009 on the signing and provisional application of the Interim Agreement establishing a framework for an Economic Partnership Agreement between the Eastern and Southern Africa States, on the one part, and the European Community and its Member States, on the other part, OJ L 111, 24.4.2012, p. 1; Interim Agreement establishing a framework for an Economic Partnership Agreement between the Eastern and Southern Africa States, on the one part, and the European Community and its Member States, on the other part, OJ L 111, 24.4.2012, p. 3. Madagascar, Mauritius, Seychelles and Zimbabwe signed the agreement in August 2009 and have applied it provisionally since 14 May 2012, while Comoros signed it in July 2017 and has applied it since February 2019.

¹⁶⁶ Council Decision 2009/156/EC of 21 November 2008 on the signature and provisional application of the stepping stone Economic Partnership Agreement between Côte d'Ivoire, of the one part, and the European Community and its Member States, of the other part, OJ L 59, 3.3.2009, p. 1; Stepping stone Economic Partnership Agreement between Côte d'Ivoire, of the one part, and the European Community and its Member States, of the other part – Protocol, OJ L 59, 3.3.2009, p. 3. The agreement has been provisionally applied since September 2016.

¹⁶⁷ Council Decision (EU) 2016/1850 of 21 November 2008 on the signature and provisional application of the stepping stone Economic Partnership Agreement with Ghana, OJ L 287, 21.10.2016, p. 1; Stepping stone Economic Partnership Agreement between Ghana, of the one part, and the European Community and its Member States, of the other part, OJ L 287, 21.10.2016, p. 3. The agreement has been provisionally applied since December 2016.

¹⁶⁸ Council Decision 2009/729/EC of 13 July 2009 on the signature and provisional application of the Interim Partnership Agreement between the European Community, of the one part, and the Pacific States, of the other part, OJ L 272, 16.10.2009, p. 1; Interim Partnership Agreement between the European Community, of the one part, and the Pacific States, of the other part, OJ L 272, 16.10.2009, p. 2; Council Decision (EU) 2020/409 of 17 February 2020 on the accession of Solomon Islands to the Interim Partnership Agreement between the European Community, of the one part, and the Pacific States, of the other part, OJ L 85 p. 1.

¹⁶⁹ EU-SADC EPA, Art. 40(9).

¹⁷⁰ Communication from the Commission to the Council, the European Parliament, the European Economic and Social Committee and the Committee of the Regions of 4 October 2006, Global Europe: Competing in the world, COM(2006) 567 final.



the 2010 Trade Growth and World Affairs strategy,¹⁷¹ the 2015 Trade for All strategy,¹⁷² the 2017 Reflection Paper on “A balanced and progressive trade policy to harness globalisation”,¹⁷³ the 2021 Trade Policy Review,¹⁷⁴ and more recently the 2023 Economic Security strategy.¹⁷⁵ Overall, these documents show a progression in the EU’s trade stance from unqualified openness and the desire to capitalise on the benefits from globalisation to the progressive realisation that some countries are not abiding by the multilateral trade rules, and the drive towards strategic autonomy to cope with an imbalanced playing field and unfair competition.

At the same time, cultural relations between the EU and developed countries involve cooperation in several sectors, with a strong emphasis on soft power and cultural diplomacy (Jones, 2010; Triandafyllidou & Szucs, 2017).¹⁷⁶ Specifically, the EU engages in cultural diplomacy and promotes European culture and cultural exchanges, including joint initiatives such as the EU-Japan Fest,¹⁷⁷ the Europe Day celebrations in Australia,¹⁷⁸ and the EU-China Year of Intercultural Dialogue.¹⁷⁹

As regards the audiovisual, the economic and other agreements the EU has concluded with developed countries include provisions on audiovisual cooperation and cultural exchanges. Relevant agreements also establish the conditions under which European audiovisual works and films may access developed markets and vice-versa. The following sections examine the agreements the EU has negotiated with non-European developed countries, reviewing how the agreements consider and treat the audiovisual industry and how they structure audiovisual cooperation with the EU. The agreements covered are those negotiated with Canada, Australia, China, Japan, South Korea, and Singapore. The Trade and Cooperation Agreement (TCA) between the EU and the United Kingdom (UK) is also examined in this section with a view to

¹⁷¹ Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, Trade, Growth and World Affairs Trade Policy as a core component of the EU’s 2020 strategy, COM(2010) 612 final.

¹⁷² Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions Trade for all: Towards a more responsible trade and investment policy, COM(2015) 497 final.

¹⁷³ Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, A balanced and progressive trade policy to harness globalisation, COM(2017) 492 final.

¹⁷⁴ Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, Trade Policy Review – An Open, Sustainable and Assertive Trade Policy, COM(2021) 66 final.

¹⁷⁵ Joint Communication to the European Parliament, the European Council and the Council, European Economic Security Strategy, JOIN(2023) 20 final.

¹⁷⁶ See also, European Commission, Joint communication to the European Parliament and the Council – Towards an EU strategy for international cultural relations, JOIN/2016/029 final.

¹⁷⁷ For details, see <https://www.eu-japanfest.org/en/>.

¹⁷⁸ For details, see https://www.eeas.europa.eu/delegations/australia/europe-day-2024-australia_en?s=163.

¹⁷⁹ For details, see https://ec.europa.eu/commission/presscorner/detail/en/ip_12_91.



identifying whether it considers—and seeks to deal with—the consequences of Brexit on (pre-existing) trade relations and audiovisual cooperation between the two parties.

2.2.1 United Kingdom

The TCA between the EU and the United Kingdom¹⁸⁰ was signed in December 2020 and entered into force in May 2021. Provisions related to the audiovisual sector are found in the section dealing with intellectual property rights and aim to “facilitate the production, provision and commercialisation of innovative and creative products and services”.¹⁸¹ The section includes clauses on the term of protection for the rights of authors, performers, producers, and broadcasting organisations.¹⁸² Moreover, the Parties agree to ratify or accede to the Beijing Treaty on Audiovisual Performances¹⁸³ which regulates copyright in internationally distributed audiovisual works.¹⁸⁴

Other than that, the audiovisual industry is excluded from the agreement’s basic market access and investment protection commitments (including MFN, NT or so-called “performance requirements”¹⁸⁵), as well as from the titles on services and investment¹⁸⁶ and the chapter on SOEs, enterprises granted special rights or privileges, and designated monopolies.¹⁸⁷ The title on digital trade,¹⁸⁸ which includes commitments vis-à-vis the liberalisation of trade by electronic means and outlines the parties’ agreement to cooperate at the global level on digitalisation,¹⁸⁹ does not apply to audiovisual services, either.¹⁹⁰ In short, the audiovisual sector is treated as it is in any other trade agreement with third countries.

¹⁸⁰ Council Decision (EU) 2021/689 of 29 April 2021 on the conclusion, on behalf of the Union, of the Trade and Cooperation Agreement between the European Union and the European Atomic Energy Community, of the one part, and the United Kingdom of Great Britain and Northern Ireland, of the other part, and of the Agreement between the European Union and the United Kingdom of Great Britain and Northern Ireland concerning security procedures for exchanging and protecting classified information, OJ L 149, 30.4.2021, p. 2; Trade and Cooperation Agreement between the European Union and the European Atomic Energy Community, of the one part, and the United Kingdom of Great Britain and Northern Ireland, of the other part, OJ L 149, 30.4.2021, p. 10.

¹⁸¹ EU-UK TCA Art. 219.

¹⁸² Ibid, Art. 230. The dispute settlement mechanism established by the agreement is applicable to disputes that may arise from the protection of intellectual property rights and copyright, including audiovisual-related disputes.

¹⁸³ Beijing Treaty on Audiovisual Performances, available: <https://www.wipo.int/wipolex/en/text/295838>.

¹⁸⁴ EU-UK Trade and Cooperation Agreement, Art. 222(2).

¹⁸⁵ Performance requirements are regulatory conditions imposed by host states requiring investors to achieve certain economic and social goals in relation to the establishment or operation of their investments. For details, see <https://jusmundi.com/en/document/publication/en-performance-requirements>.

¹⁸⁶ EU-UK TCA, Title II.

¹⁸⁷ Ibid, Title XI, Chapter 4.

¹⁸⁸ Ibid, Title III.

¹⁸⁹ Ibid, Art. 770(2).

¹⁹⁰ Ibid, Art. 197(2).



2.2.2 Australia

Trade relations between the EU and Australia are governed by the EU-Australia Framework Agreement, signed in September 2016 and in force since October 2022.¹⁹¹ The agreement aims to reduce technical barriers to trade and improve trade conditions in the EU and Australian markets. It also includes provisions on political dialogue and cooperation.

The title on cooperation in the area of education and culture includes a specific article on cultural, audiovisual and media cooperation.¹⁹² The parties commit to promote closer cooperation in order to enhance knowledge of their respective cultures, strengthen cultural exchanges, and carry out joint initiatives in cultural areas using available cooperation instruments and frameworks such as the Erasmus+ programme, Europe Centres¹⁹³ and the EUNIC network.¹⁹⁴ They also commit to promote the mobility of culture professionals, encourage intercultural dialogue between civil society organisations and individuals, and engage in policy dialogue in relevant international fora, especially UNESCO, with a view to pursuing common objectives and fostering cultural diversity, including through the implementation of the UNESCO Convention.¹⁹⁵ The parties shall also support cultural cooperation within the framework of the Asia-Europe Meeting (ASEM)—a forum for dialogue and cooperation that brings together European and Asian partners, particularly through the Asia-Europe Foundation (ASEF)¹⁹⁶—and coordinate positions within regional and international organisations.¹⁹⁷ Regarding the audiovisual sector in particular, the parties have agreed to encourage, support and facilitate exchanges, cooperation and dialogue between institutions and professionals in the audiovisual and media field.¹⁹⁸

¹⁹¹ Council Decision (EU) 2022/1664 of 20 September 2022 on the conclusion on behalf of the Union of the Framework Agreement between the European Union and its Member States, of the one part, and Australia, of the other part, OJ L 255, 03/10/2022, p. 1; Framework Agreement between the European Union and its Member States, of the one part, and Australia, of the other part, OJ L 237, 15.9.2017, p. 7.

¹⁹² EU-Australia Framework Agreement, Art. 44.

¹⁹³ The EU Centres are an initiative set up in Australia to provide information about the EU and encourage greater understanding of the EU and its policies, including cultural policy and initiatives. See https://www.eeas.europa.eu/sites/default/files/partnership_framework2009eu_en.pdf.

¹⁹⁴ The European Union National Institutes for Culture (EUNIC) is the European network of organisations engaging in cultural relations. Supported by Creative Europe since 2014, EUNIC advocates a prominent role for culture in international relations and is actively involved in the definition of European cultural policy. See <https://www.eunicglobal.eu/>.

¹⁹⁵ EU-Australia Framework Agreement, Art. 44(1) to (5).

¹⁹⁶ The Asia-Europe Foundation is an intergovernmental not-for-profit organisation that acts as the civil society outreach of the Asia-Europe Meeting (ASEM) and serves as a platform for Asia-Europe dialogues to stimulate permanent networks that reinforce Asia-Europe bilateral relations. One of its five departments is its Culture Department, through which ASEM aims to promote cultural relations by connecting artists, cultural professionals, arts organisations, public institutions, networks and museums in Asia and Europe. More info at <https://asef.org/themes/culture/>.

¹⁹⁷ EU-Australia Framework Agreement, Arts 10, 44.

¹⁹⁸ Ibid, Art. 44(6).



The EU and Australia are currently in the process of negotiating an FTA, following the EU Council's authorisation to open negotiations on 22 May 2018. Given Australian sensitivity towards the audiovisual sector, an audiovisual exclusion is unlikely to prove contentious between Australia and the EU (Mishra, 2022). The EU's proposed draft chapter on digital trade also excludes audiovisual services and underlines the right to regulate in favour of legitimate public policy objectives, including the promotion and protection of cultural diversity (Vlassis et al., 2021).

2.2.3 Canada

EU-Canada relations have undergone a significant update over the last decade. In September 2011, negotiations were launched for the Comprehensive Economic and Trade Agreement (CETA)¹⁹⁹ and Strategic Partnership Agreement (SPA)²⁰⁰ to replace the outdated 1976 Framework Agreement for Commercial and Economic Cooperation and build upon the 2004 EU-Canada Partnership Agenda.²⁰¹ While both agreements provisionally entered into force in April 2017, they are still awaiting the ratification of all EU Member States.

It was already evident from the 2004 Partnership Agenda that the EU and Canada share similar cultural values, since both “attach particular importance to cultural diversity”, “have a shared interest in promoting cultural pluralism”, and “a shared need to ensure the promotion of recognition of cultural diversity multilaterally.”²⁰² According to the Partnership Agenda, they agreed to “examine ways to deepen their cooperation on cultural matters in international fora”, including “the development of a UNESCO Convention on Cultural Diversity”,²⁰³ this materialised with the conclusion of the UNESCO Convention, in which both parties played an important role. Similarly, the SPA expresses the EU and Canada's shared commitment to the protection and promotion of the diversity of cultural expressions,²⁰⁴ which they aim to further by seeking new ways to foster relationships through people-to-people contacts, exchanges through NGOs and think tanks, youth and other economic and social partners; promoting the 2005 UNESCO Convention; and facilitating

¹⁹⁹ Council Decision (EU) 2017/37 of 28 October 2016 on the signing on behalf of the European Union of the Comprehensive Economic and Trade Agreement (CETA) between Canada, of the one part, and the European Union and its Member States, of the other part, OJ L 11, 14.1.2017, p. 1; Comprehensive Economic and Trade Agreement (CETA) between Canada, of the one part, and the European Union and its Member States, of the other part, OJ L 11, 14.1.2017, p. 23.

²⁰⁰ Council Decision (EU) 2016/2118 of 28 October 2016 on the signing, on behalf of the Union, and provisional application of the Strategic Partnership Agreement between the European Union and its Member States, of the one part, and Canada, of the other part, OJ L 329, 3.12.2016, p. 43; Strategic Partnership Agreement between the European Union and its Member States, of the one part, and Canada, of the other part, OJ L 329, 3.12.2016, p. 45.

²⁰¹ European Union–Canada Partnership Agenda, adopted at the EU-Canada Summit, Ottawa, 18 March 2004, p. 10, https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=genpub:PUB_NF0104004.

²⁰² Ibid, p 6.

²⁰³ Ibid.

²⁰⁴ EU-Canada SPA, Preamble, entry 9.



institutional cooperation and dialogue between professionals in this sector.²⁰⁵ The audiovisual and film industries are not specifically mentioned in the SPA.

As in the CETA, the preamble affirms the parties' commitment to the 2005 UNESCO Convention and recognises the states' right to regulate on cultural matters.²⁰⁶ The agreement includes an asymmetric cultural exception (Maltais, 2014): while for the EU, the exception applies to audiovisual services, for Canada it applies to the cultural industries²⁰⁷ more broadly.²⁰⁸ The exception applies to the chapters on investment,²⁰⁹ subsidies and government support,²¹⁰ domestic regulation²¹¹ and cross-border trade in services.²¹² Regarding investment, the Canadian side included a reservation stating that the Canada Business Corporations Regulations (2001) requires a simple majority of resident Canadian directors for corporations in the film or video distribution sector.²¹³ The list of reservations further specifies that the chapter on government procurement does not apply to either the acquisition, development, production or co-production of programme material by broadcasters, or to contracts for broadcasting time.²¹⁴

2.2.4 China

The Comprehensive Agreement on Investment (CAI) between the EU and China was agreed in principle in 30 December 2020²¹⁵ but has not been formally concluded, as the European Parliament has not given its consent. Neither an FTA nor an IPA, the agreement falls in between as an Investment Liberalisation Agreement, since the parties could not agree on a full-fledged IPA (Comerma, 2024).²¹⁶

²⁰⁵ Ibid, Art. 16.

²⁰⁶ CETA, Preamble, Recital 7.

²⁰⁷ Cultural industries are defined as "persons engaged in: (a) the publication, distribution or sale of books, magazines, periodicals or newspapers in print or machine-readable form, except when printing or typesetting any of the foregoing is the only activity; (b) the production, distribution, sale or exhibition of film or video recordings; (c) the production, distribution, sale or exhibition of audio or video music recordings; (d) the publication, distribution or sale of music in print or machine-readable form; or (e) radio-communications in which the transmissions are intended for direct reception by the general public, and all radio, television and cable broadcasting undertakings and all satellite programming and broadcast network services" (see Ibid, Ch.1, Section A, Art.1.1).

²⁰⁸ This is a combination of the Canadian and EU approaches to culture and the audiovisual in a trade context (García-Leiva, 2015). See Ibid, Arts 7.7, 8.2, 9.2.2 and 12.2.2.

²⁰⁹ Ibid, Art. 8(2).

²¹⁰ Ibid, Art. 7(7).

²¹¹ Ibid, Art. 12(2).

²¹² Ibid, Art. 9(2).

²¹³ Ibid, Annex (I-C-4).

²¹⁴ Ibid, Annex 19-7.

²¹⁵ EU-China Comprehensive Agreement on Investment. Agreement in principle, available at https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/china/eu-china-agreement/eu-china-agreement-principle_en.

²¹⁶ While an FTA is an agreement between two or more parties who agree on certain obligations that affect trade in goods and services with a view to reducing barriers to trade to promote trade flows between the contracting parties, an IPA aims to promote and protect investments in the territory of one contracting party (the "host state") made by investors from the other contracting party, while furthering the development of both parties.



The text of the agreement in principle²¹⁷ reflects the EU's 'audiovisual exception' rationale and also shows China's protectionist approach to the audiovisual services and film industry. Audiovisual services are excluded from both the chapter on investment liberalisation²¹⁸ and from commitments vis-à-vis the transparency of subsidies.²¹⁹ Still, audiovisual services are included on China's negative list with respect to NT and Performance Requirements, establishing that "foreign investors may not invest in audiovisual services [...]; and that the yearly aggregate volume of overseas films and television series introduced to be exclusively used for information network shall not exceed 30% of the aggregate volume of domestically produced films and television series used for information network in the previous year."²²⁰ The latter effectively introduces a quota on the entry of European films into China. This is to the benefit of the domestic film industry, which is considered one of the most tightly controlled and isolated sectors in the Chinese economy; it also reflects China's oversight policy over the digital sector (Zhao and Schiller, 2001). Therefore, it is clear that the audiovisual and film industry sectors are excluded from the provisions included in the investment agreement with regard to the protection of foreign investment in the other party and ensuring that it stays limited and under domestic control.

2.2.5 Japan

The trade relationship between the EU and Japan is governed by the EU-Japan EPA, which was signed in 2018 and has been in force since 2019.²²¹ Audiovisual services are explicitly excluded from the sections on investment liberalisation,²²² cross-border trade in services²²³ and electronic commerce,²²⁴ as well as from the chapter on subsidies.²²⁵ The parties also agree to "make all reasonable efforts to ratify or accede to [...] the Beijing Treaty on Audiovisual Performances".²²⁶

²¹⁷ EU-China CAI, Agreement in principle.

²¹⁸ Ibid, Section II, Art. 1.

²¹⁹ Ibid, Section III, Art. 8(3).

²²⁰ Ibid, Annex I, Entry 25. Note that although after its WTO accession in 2001, China committed to increase the number of imported films (Vlassis, 2015), the WTO condemned China in 2009 for its trade practices in the cultural sector, following a 2007 US complaint. This resulted in the US and China signing a memorandum of understanding on WTO-related problems in the film industry, by which China gave increased market access to US films (Vlassis, 2012).

²²¹ Council Decision (EU) 2018/1907 of 20 December 2018 on the conclusion of the Agreement between the European Union and Japan for an Economic Partnership, OJ L 330, 27.12.2018, p.1; Agreement between the European Union and Japan for an Economic Partnership, OJ L 330, 27.12.2018, p.3

²²² EU-Japan EPA, Section B.

²²³ Ibid, Section C.

²²⁴ Ibid, Section F.

²²⁵ Ibid, Chapter 12.

²²⁶ Ibid, Art. 14(3).



The other major agreement that frames EU-Japan relations is their SPA.²²⁷ Signed in July 2018, the Agreement addresses both political and sectoral cooperation in issues of common interest and vis-à-vis regional and global challenges. Culture is one such sector, including cooperation in audiovisual works and films.²²⁸ Specifically, the EU and Japan commit to enhance the exchange of persons engaging in cultural activities and to carry out joint initiatives in various cultural areas, including audiovisual works such as films. This might be interpreted as including co-productions. The parties also agree to encourage dialogue and cooperation between their respective civil societies and institutions in cultural sectors with a view to enhancing mutual awareness and understanding, and to cooperate at the level of UNESCO to pursue common objectives in the area of culture and to promote cultural diversity.²²⁹

2.2.6 Korea

Trade relations between the EU and the Republic of Korea are governed by an FTA signed in October 2009 and in force since July 2011.²³⁰ Audiovisual services are excluded from the chapter on trade in services, investment and electronic commerce.²³¹ This means that they do not benefit from the liberalisation and market access commitments made in the agreement.²³²

In March 2025, the EU and Korea concluded negotiations on the Digital Trade Agreement (DTA).²³³ Once signed and entered into force, the Agreement shall complement the EU-Korea FTA and cover inter-alia cross-border data flows, privacy and personal data protection, customs duties on electronic transmissions, electronic contracts, and regulatory cooperation on digital trade.²³⁴ It shall not apply to the audiovisual sector.²³⁵

²²⁷ Council Decision (EU) 2024/1394 of 22 April 2024 on the conclusion, on behalf of the European Union, of the Strategic Partnership Agreement between the European Union and its Member States, of the one part, and Japan, of the other part, OJ L 1394, 21.5.2024, p.1; Strategic Partnership Agreement between the European Union and its Member States, of the one part, and Japan, of the other part, OJ L 2016, 24.8.2018, p. 4.

²²⁸ EU-Japan SPA, Art. 41.

²²⁹ Ibid, Art. 41.

²³⁰ Decision (EU) 2015/2169 of 1 October 2015 on the conclusion of the Free Trade Agreement between the EU and the EU Member States, of the one part, and South Korea, of the other part, OJ L 307, 25.11.2015, p. 2; Free trade Agreement between the European Union and its Member States, of the one part, and the Republic of Korea, of the other part, OJ L 127, 14.5.2011, p. 6.

²³¹ EU-Korea FTA, Arts 7(4), 7(10).

²³² Ibid. The parties establish that this exclusion is without prejudice to the rights and obligations derived from the EU-Korea Protocol on Cultural Cooperation (PCC).

²³³ See https://ec.europa.eu/commission/presscorner/detail/en/ip_25_732.

²³⁴ Agreement on Digital Trade between the EU and the Republic of Korea, Agreement in principle, <https://circabc.europa.eu/ui/group/09242a36-a438-40fd-a7af-fe32e36cbd0e/library/1bddb97a-c02e-41e6-95d1-6e41029c880f/details?download=true>.

²³⁵ Ibid.



The PCC was negotiated in parallel to the FTA and is annexed to it, without being attached to any particular section. The text starts off by recognising the importance of the culture and creative industries, as well as the “multi-faceted nature of cultural goods and services as cultural, economic and social value” in line with the UNESCO Convention.²³⁶ The Protocol adopts the exact same definition of cultural diversity, cultural expressions, cultural activities and cultural industries as the UNESCO Convention.²³⁷ It aims to reinforce the capacities and independence of the EU and Korea’s cultural industries, setting out procedures to allow cooperation between the parties on cultural issues (Brown, 2011).²³⁸ In its preamble, the Protocol states its aim to promote and protect cultural diversity and dialogue.²³⁹ This shall be achieved via the development of cultural policies, cooperation and exchange between the cultural industries of both parties, taking three factors into account on a case-by-case basis: the degree of development of their cultural industries, the level and structural imbalances of cultural exchanges, and the existence of schemes for the promotion of local/regional cultural content.²⁴⁰

The Protocol contains both horizontal and sectoral provisions. Its horizontal provisions, which apply to all cultural sectors, provide that the EU and Korea shall aim at fostering “their capacities to determine and develop their cultural policies, developing their cultural industries and enhancing exchange opportunities for cultural goods and services [...], including through entitlement to benefit from schemes for the promotion of local/regional cultural content.”²⁴¹ This includes exchange of information on cultural and audiovisual matters through dialogue and exchange of good practices in the field of intellectual property rights protection, within the framework of a Committee on Cultural Cooperation²⁴² and other relevant fora.²⁴³ This Committee is also responsible for the settlement of disputes, as provided for by the PCC.²⁴⁴ Specifically, the Protocol establishes that the consultation procedure set up by the FTA as a dispute settlement mechanism²⁴⁵ is applicable to disputes arising from the Protocol;²⁴⁶ the key difference is that they are to be settled by the special Committee on Cultural Cooperation, which comprises senior officials from within the administration of each party who have expertise and experience in cultural

²³⁶ EU-Korea PCC, Preamble.

²³⁷ Ibid, Art. 1(4).

²³⁸ Ibid, Preamble.

²³⁹ Ibid.

²⁴⁰ Ibid.

²⁴¹ Ibid, Section A, Art. 2(1).

²⁴² Ibid, Section A, Art. 3.

²⁴³ Ibid, Section A, Art. 2.2.

²⁴⁴ Ibid, Art. 3bis.

²⁴⁵ Ibid, Chapter 14.

²⁴⁶ Ibid, Section A, Art. 3bis.



matters and practices.²⁴⁷ It is thus made clear that the Trade Committee established by the FTA has no jurisdiction over disputes under the PCC provisions.²⁴⁸

The PCC pays particular attention to the audiovisual sector, defining the rights and obligations that apply to this sector in the light of its exclusion from the commitments of the FTA.²⁴⁹ The sectoral provisions on the audiovisual focus on co-productions,²⁵⁰ but also cover other types of cooperation such as festivals, seminars, cooperation and exchange between the broadcasting industries and of audiovisual works,²⁵¹ the promotion of each party's territory as a location for the shooting of films and TV programmes, the rental and leasing of the technical material and equipment necessary to create and record audiovisual works, and the temporary importation of material and equipment for the purpose of shooting audiovisual works.²⁵² They also provide that the parties shall facilitate the use of international and regional standards in order to ensure the compatibility and interoperability of audiovisual technologies.²⁵³

Concerning audiovisual co-productions in particular, the parties agree that they may grant financial benefits to co-produced audiovisual works between one or more EU Member States and Korea.²⁵⁴ Crucially, they also allow such works to benefit from respective schemes for the promotion of local/regional cultural content.²⁵⁵ Indeed, both parties commit to entitle co-productions that meet certain conditions²⁵⁶ to the same treatment as national works in their respective markets. EU-Korea co-productions shall qualify as "Korean works" in the Korean market,²⁵⁷ thus lifting the pre-existing domestic screen quota and facilitating the promotion of EU films in the Korean

²⁴⁷ Ibid, Section A, Art. 3.

²⁴⁸ Ibid, Section A, art. 3bis.

²⁴⁹ Ibid, Art. 1(2) and Section B.

²⁵⁰ Art. 5(1)) of the PCC defines a film co-production "an audiovisual work produced by producers of both Korea and the EU Party into which those producers have invested in accordance with the terms of the Protocol".

²⁵¹ Ibid, Art. 6.

²⁵² Ibid, Arts 6 and 7.

²⁵³ Ibid, Art. 6 (2).

²⁵⁴ Ibid, Art. 5(2).

²⁵⁵ Ibid, Art. 5(3).

²⁵⁶ Ibid, Art. 5(6). Art. 5(6) specifies the conditions whereby co-productions are entitled to benefit from the respective schemes for the promotion of local/regional cultural content as follows: (a) the co-produced audiovisual works are realised between undertakings which are owned directly or by a majority participation by an EU Member State or Korea respectively, and/or by nationals of a Member State of the European Union or nationals of Korea respectively; (b) the directors or managers have European or Korean nationality and can prove they live there; (c) participation of producers from two EU Member States (except for animation works, which require three Member States) which contribute no less than 10 percent of the budget; and (d) the minimum respective financial contributions to a co-produced audiovisual work of the producers of the EU Party (taken together) and the producers of Korea (taken together) may not be less than 30 percent of the total production cost of the audiovisual work (with the exception of animation works, where this contribution may not be less than 35 percent of the total production cost); (e) the contribution of each party's producer includes effective technical and artistic participation; and (f) the participation of a third country that has ratified the UNESCO Convention is accepted to a maximum of 20 percent of the total costs and/or technical and artistic contribution.

²⁵⁷ Ibid, Art. 5(5).



market.²⁵⁸ These co-productions also qualify as “European works”, eligible to be included in the European content promotion and quota provisions foreseen in the AVMSD. This entitlement was established for a period of three years.²⁵⁹ Pursuant to Article 5(8)(b) of the Protocol, “[t]he entitlement will be renewed for a duration of three years and shall thereafter be automatically renewed for further successive periods of the same duration, unless a Party terminates the entitlement [...]”.²⁶⁰

2.2.7 Singapore

The EU’s trade relations with Singapore are framed by the EU-Singapore FTA.²⁶¹ This agreement was significant both for the EU, whose visibility it helped raise in South-East Asia (Sanderson, 2015),²⁶² and for Singapore, which became the first country of the Association of Southeast Asian Nations (ASEAN) to sign an FTA with the EU as an individual country. Here, too, the EU was successful in excluding audiovisual services from the investment liberalisation and protection commitments made both in the FTA and the IPA. The FTA customarily excludes audiovisual services from the commitments on the cross-border supply of services²⁶³ and the section on the establishment of economic activities.²⁶⁴ In July 2024, the EU and Singapore concluded negotiations for a DTA, which was signed in April 2025.²⁶⁵ This is a self-standing agreement that complements the EU-Singapore FTA of 2018 and applies to all types of trade enabled by electronic means, with the exception of audiovisual and broadcasting services.²⁶⁶ The EU and Singapore have also signed an IPA,²⁶⁷ which will enter into force once it has been ratified by all EU

²⁵⁸ Ibid, Art. 5(1).

²⁵⁹ From 1 July 2011 until 30 June 2014.

²⁶⁰ In accordance with this provision, the entitlement was renewed three times for another three years. The most recent renewal ran until 30 June 2023. See Council Decision 2023/412 of 21 February 2023 as regards the extension of the period of entitlement for audiovisual co-productions as provided for in Article 5 of the Protocol on Cultural Cooperation to the Free Trade Agreement between the European Union and its Member States, of the one part, and the Republic of Korea, of the other part, OJ L 59, 24.2.2023, p. 11–12, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32023D0412>.

²⁶¹ Council Decision (EU) 2019/1875 of 8 November 2019 on the conclusion of the Free Trade Agreement between the European Union and the Republic of Singapore, OJ L 294, 14.11.2019, p. 1; Free trade Agreement between the European Union and the Republic of Singapore, OJ L 294, 14.11.2019, p. 3.

²⁶² For the EU today, Singapore represents a gateway to the Asia-Pacific and a bridge between the markets and institutions of these two giant regions (Sanderson, 2015).

²⁶³ EU-Singapore FTA, Art. 8(3).

²⁶⁴ Ibid, Arts. 8(3) and 8(9).

²⁶⁵ Council Decision (EU) 2025/798 of 14 April 2025 on the signing, on behalf of the Union, of the Agreement on Digital Trade between the European Union and the Republic of Singapore, OJ L, 2025/798, 25.4.2025.

²⁶⁶ EU-Singapore DTA, Art. 2(a) and (b).

²⁶⁷ Council Decision (EU) 2018/1676 of 15 October 2018 on the signing, on behalf of the European Union, of the Investment Protection Agreement between the European Union and its Member States, of the one part, and the Republic of Singapore, of the other part, OJ L 279, 9.11.2018, p. 1. EU-Singapore Investment Protection Agreement, Agreement in Principle, available at: https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/singapore/eu-singapore-agreements/texts-agreements_en.



Member States according to their own national procedures. The IPA sets out rules that give EU investors and their investments in Singapore a high level of protection, excluding audiovisual services from the application of the NT principle.²⁶⁸

2.3 Neighbourhood countries

Relations between the EU and its neighbourhood countries, both to the east and the south, are structured within the cooperation that takes place under the European Neighbourhood Policy (ENP) and, in the case of the southern neighbourhood, the Euro-Med Partnership (EMP),²⁶⁹ now renamed the Union for the Mediterranean (UfM).²⁷⁰ In the case of the eastern neighbourhood, the ENP evolved into the Eastern Partnership (EaP) programme,²⁷¹ which is aimed at enhancing the EU's bilateral relations with six Eastern European and South Caucasus partner countries (Armenia, Azerbaijan and Belarus, along with Georgia, Moldova and Ukraine, which have gained candidate status) beyond the existing ENP platform and creating a regular formula for multilateral cooperation, including cultural cooperation. The Southern dimension of the ENP is focused on Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine, Syria and Tunisia. It was further detailed by the EU in its "Renewed partnership with the southern neighbourhood – A new Agenda for the Mediterranean".²⁷² Enhancing cooperation on culture is one of the key action points in this agenda, which the EU seeks to accomplish by supporting the capacity of cultural ministries in southern neighbourhood countries. It also aims to deepen intercultural dialogue and to boost the digital transformation by encouraging digital access to culture and cultural heritage.

2.3.1 Eastern neighbourhood

Cooperation between the EU and the countries in its eastern neighbourhood is framed mainly within the ENP, and by the EaP programme in particular, as mentioned above. The EaP is specifically committed to developing trade, cultural cooperation and contacts between citizens with

²⁶⁸ EU-Singapore IPA.

²⁶⁹ Council of the European Union, Joint Declaration of the Paris Summit for the Mediterranean Brussels, 15 July 2008. https://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/er/101847.pdf.

²⁷⁰ The Union for the Mediterranean is an international organisation which seeks to enhance regional cooperation (<https://ufmsecretariat.org/>). It also addresses cultural cooperation between the EU and its southern neighbourhood through initiatives such as the Mediterranean Capitals of Culture and Dialogue. For more information, see <https://medculturecapital.com/>.

²⁷¹ Joint Communication to the European Parliament, the European Council, the Council, the European Economic and Social Committee and the Committee of the Regions, 'Eastern Partnership policy beyond 2020: Reinforcing Resilience – an Eastern Partnership that delivers for all', JOIN(2020) 7 final, https://www.eeas.europa.eu/sites/default/files/1_en_act_part1_v6.pdf.

²⁷² European Commission (2021), Renewed partnership with the Southern Neighbourhood – A new Agenda for the Mediterranean, SWD(2021) 23 final, https://www.eeas.europa.eu/sites/default/files/joint_communication_renewed_partnership_southern_neighbourhood.pdf.



a view to supporting rapprochement with the member countries and the EU (Schäffer, 2010). Through trade agreements, the EU aims to develop market opportunities, stability and prosperity in its eastern neighbourhood region, along with its objectives of sustainable growth defined by the European Green Deal and the European Digital Strategy.²⁷³ Yet, free trade as an objective is less advanced with the current eastern neighbourhood as compared to the three countries that have moved forward with a candidate status (namely, Ukraine, Moldova and Georgia—see section 3.4.2), whereas with Armenia and Azerbaijan, the EU relies mostly on its Partnership Agreements. In the field of culture, cooperation with the Eastern Partnership countries centres around promoting cultural cooperation through cultural diplomacy and intercultural dialogue, including through participation in the EU's flagship cultural programme, Creative Europe.

Belarus is the only eastern neighbour country that does not have a bilateral Partnership and Cooperation Agreement with the EU, as the one concluded in 1995 has not been ratified by the EU, due to Belarus' democratic deficit and its violations of political and civil rights.²⁷⁴ Bilateral relations with Belarus therefore remain covered by the TCA signed between the European Community and the Soviet Union in 1989.²⁷⁵ This agreement does not cover the audiovisual sector and does not contain any provisions on cultural and audiovisual cooperation.

Armenia

The EU-Armenia Comprehensive and Enhanced Partnership Agreement (CEPA) was signed in November 2017 and entered into force in March 2021.²⁷⁶ The agreement includes provisions on trade and cooperation between the parties, as well as mechanisms of legislative approximation to EU norms in the rule of law and respect for human rights.

The audiovisual sector is excluded from trade liberalisation regarding establishment and the cross-border supply of services.²⁷⁷ The agreement also states that the rights and obligations

²⁷³ EEAS, European Neighbourhood Policy, 2021, https://www.eeas.europa.eu/eeas/european-neighbourhood-policy_en#7132.

²⁷⁴ European Commission, Belarus, https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/belarus_en.

²⁷⁵ Council Decision of 26 February 1990 on the conclusion by the European Economic Community of an Agreement between the European Economic Community and the European Atomic Energy Community and the Union of Soviet Socialist Republics on trade and commercial and economic cooperation, OJ L 68, 15.3.1990, p. 1.

²⁷⁶ Council Decision (EU) 2018/104 of 20 November 2017 on the signing, on behalf of the Union, and provisional application of the Comprehensive and Enhanced Partnership Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and the Republic of Armenia, of the other part, OJ L 23, 26.1.2018, p. 1; Comprehensive and enhanced Partnership Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and the Republic of Armenia, of the other part, OJ L 23, 26.1.2018, p. 4.

²⁷⁷ EU-Armenia CEPA, Arts 143, 148 and 151.



arising from it are without prejudice to the 1989 European Convention on Transfrontier Television and the 1992 European Convention on Cinematographic Co-Production.²⁷⁸ With respect to copyright, the agreement regulates the terms and length of protection accorded to copyright for audiovisual works²⁷⁹ and states that both parties should make all reasonable efforts to accede to the Beijing Treaty on Audiovisual Performances.²⁸⁰

The agreement foresees “cooperation in the audiovisual and media fields” through a specific article.²⁸¹ Cooperation shall aim at strengthening the parties’ audiovisual industries, in particular through the training of professionals and the exchange of information.²⁸² It shall focus on policy dialogue on audiovisual and media policies, cooperation in international fora (UNESCO, WTO), and audiovisual and media cooperation, including in the field of cinema.²⁸³ The agreement stipulates in particular that the parties shall develop a regular dialogue on audiovisual and media policies to reinforce the independence and professionalism of the media, as well as compliance with European standards, including those of the Council of Europe and the UNESCO Convention.²⁸⁴ The agreement further includes an article on cultural cooperation covering cultural exchanges, art and artists mobility, intercultural dialogue, cultural policy dialogue, and cooperation in international fora.²⁸⁵

Azerbaijan

Cultural issues are an important aspect of the cooperation between the EU and Azerbaijan, although they usually take a secondary position behind issues such as energy, connectivity and economic interests (Shirinov, 2011). The EU-Azerbaijan PCA has been in force since 1999,²⁸⁶ however, negotiations on a new and upgraded framework agreement are at an advanced stage.²⁸⁷

The EU-Azerbaijan PCA does not address the liberalisation of trade in services. It does, however, include provisions on business and establishment, where the EU and the Member States grant

²⁷⁸ Ibid, Art. 151(2).

²⁷⁹ Ibid, Art. 218(7).

²⁸⁰ Ibid, Art. 212.

²⁸¹ Ibid, Chapter 19.

²⁸² Ibid, Art. 98.

²⁸³ Ibid, Art. 100.

²⁸⁴ Ibid, Art. 99(1).

²⁸⁵ Ibid, Chapter 18.

²⁸⁶ 99/614/EC, ECSC, Euratom: Council and Commission Decision of 31 May 1999 on the conclusion of the Partnership and Cooperation Agreement between the European Communities and their Member States, of the one part, and the Republic of Azerbaijan, of the other part, OJ L 246, 17.9.1999, p. 1; Partnership and Cooperation Agreement between the European Communities and their Member States, of the one part, and the Republic of Azerbaijan, of the other part, OJ L 246, 17.9.1999, p. 3.

²⁸⁷ For more information, see <https://www.consilium.europa.eu/en/policies/eastern-partnership/azerbaijan/>.



treatment no less favourable than that accorded to any third country for the establishment of Azerbaijani companies.²⁸⁸ They also commit to treat subsidiaries of Azerbaijani companies established on their territories in a manner no less favourable than that granted to any EU companies.²⁸⁹ However, Annex IV establishes a reservation that, in the EU, national treatment vis-à-vis production and distribution, including broadcasting and other forms of transmission, may be reserved to audiovisual works meeting certain origin criteria.²⁹⁰ The agreement includes provisions on cultural cooperation. However, the audiovisual is not explicitly addressed. The relevant provisions outline the parties' commitment to promote, encourage and facilitate cultural cooperation, including by considering Azerbaijan's participation in the EU's cultural cooperation programmes or those of the Member States.²⁹¹ Cultural cooperation can also involve cultural exchange between institutions and artists and other cultural professionals.²⁹²

2.3.2 Southern neighbourhood

The EU has had the long-standing objective of promoting economic integration in the Euro-Mediterranean area by removing barriers to trade and investment with its southern neighbourhood. In 1995, it launched the Euro-Mediterranean Partnership at the Barcelona Conference. The Partnership sought to establish an area of stability and economic prosperity, and was later expanded by means of the UfM. To this end, the agreements subsequently concluded between the EU and its southern neighbours (except Syria and Libya) sought to create the conditions for the progressive liberalisation of trade in goods, services and capital. The AAs signed between the EU and the countries in the southern neighbourhood (Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine, Syria and Tunisia) are very similar, especially those signed in 1995-1997, with minor modifications in each case. The AAs created asymmetric free trade areas for manufactured goods by removing custom duties on many tariff lines under the EU's Generalised System of Preferences²⁹³ and Global Mediterranean Policy²⁹⁴ (Micallef, 2025), with some concessions on agricultural products and fisheries.

²⁸⁸ EU-Azerbaijan PCA, Art. 23(1).

²⁸⁹ Ibid, Art. 23(2).

²⁹⁰ What this origin criteria might be is not specified in the text. Note that the agreement's dispute settlement mechanism is applicable to this provision.

²⁹¹ EU-Azerbaijan PCA, Art. 73. The cooperation may include the exchange of information and experience in the sphere of architectural legacy, and cultural exchanges between institutions, artists and other people working in the broadly defined art sector.

²⁹² Ibid.

²⁹³ For details on the EU's Generalised System of Preferences, see: https://policy.trade.ec.europa.eu/development-and-sustainability/generalised-scheme-preferences_en.

²⁹⁴ For more details on the Global Mediterranean Policy, launched in 1972, see Pierros, Meunier and Abrams (1999).



The AAs with southern neighbours (except Palestine) also touch upon trade in services. However, the relevant provisions are very limited in scope and more about “restating existing WTO commitments and laying the ground for future initiatives, rather than advancing new or binding commitments” (Micallef, 2025: 10). Thus, none of the AAs explicitly and specifically excludes the audiovisual industry from its trade provisions. Rather, the text specifies that the commitments apply as specified in the schedule of commitments undertaken by the parties under the GATS. The EU's commitments under the GATS exclude the audiovisual sector. As for the other parties, none of the southern neighbourhood countries, except Israel and Jordan, have made specific commitments in this sector.²⁹⁵

Algeria

The EU-Algeria AA was signed in April 2002 and entered into force in September 2005.²⁹⁶ The agreement sets out a framework for the relations between the EU and Algeria and establishes cooperation through regular dialogue across several issues, including the audiovisual.²⁹⁷ Audiovisual cooperation is framed within cooperation in the fields of education and culture,²⁹⁸ also taking account of Algeria's bilateral schemes with the Member States.²⁹⁹ The parties agree to encourage audiovisual cooperation, particularly through training and co-production, and to promote joint activities, including in the fields of cinema and television.³⁰⁰ Concerning trade in services, the audiovisual sector is tactfully kept out of the trade-related provisions.³⁰¹

²⁹⁵ The list of WTO members that have undertaken specific commitments vis-à-vis audiovisual services is available at: https://www.wto.org/english/tratop_e/serv_e/audiovisual_e/members_av_commitments.pdf.

²⁹⁶ Council Decision 2005/690/EC of 18 July 2005 on the conclusion of the Euro-Mediterranean Agreement establishing an Association between the European Community and its Member States, of the one part, and the People's Democratic Republic of Algeria, of the other part, OJ L 265, 10.10.2005, p. 1; Euro-Mediterranean Agreement establishing an Association between the European Community and its Member States, of the one part, and the People's Democratic Republic of Algeria, of the other part, OJ L 265, 10.10.2005, p. 2.

²⁹⁷ EU-Algeria AA, Recital 11.

²⁹⁸ Ibid, Chapter 4.

²⁹⁹ Ibid, Art. 77.

³⁰⁰ Ibid, Art. 77.

³⁰¹ This is done by reference to the non-application of the MFN principle and NT obligations regarding advantages accorded by the parties under an economic integration agreement as defined in Article V of the GATS and measures taken on their basis, as well as advantages deriving from the list of MFN exemptions annexed to the GATS by the EU and its Member States. Ibid, Art. 30(3).



Egypt

The AA between Egypt and the EU entered into force in 2004.³⁰² It includes an entire chapter on “cooperation in cultural matters, audiovisual media and information”,³⁰³ which addresses cultural cooperation through sustainable cultural dialogue³⁰⁴ and cooperation specifically on audiovisual issues. The EU shall encourage co-production and training, while the parties also commit themselves to encourage Egyptian participation in EU initiatives in this sector.³⁰⁵ Considering the social impact of such cooperation, the agreement establishes that in identifying cooperation projects, programmes and joint activities, the parties shall afford special attention to young people, self-expression, the dissemination of culture, and communication skills using written and audiovisual media.³⁰⁶ Interestingly, the agreement also foresees cooperation of a ‘commercial nature’, specifically through joint projects (production, investment and marketing), training and exchange of information.³⁰⁷ Cooperation shall be implemented through regular dialogue and the exchange of information between officials and experts; training and expertise transfer; joint actions; technical, administrative and regulatory assistance; and cooperation initiatives aimed at disseminating information.³⁰⁸ These provisions fall under the scope of the Association Council: i.e. the dispute settlement mechanism devised by the agreement.³⁰⁹ However, since they do not extend beyond cooperation commitments, the probability of such disputes arising is rather small. The audiovisual sector is left out of the parties’ respective commitments under the terms of the GATS, and in particular the MFN obligation in trade in services.³¹⁰

Israel

The EU-Israel AA, which was signed in June 2000, aims to provide the legal and institutional framework for political dialogue and economic cooperation between the EU and Israel.³¹¹ The

³⁰² Council Decision 2004/635/EC of 21 April 2004 concerning the conclusion of a Euro-Mediterranean Agreement establishing an Association between the European Communities and their Member States, of the one part, and the Arab Republic of Egypt, of the other part, OJ L 304, 30.9.2004, p. 38; Euro-Mediterranean Agreement establishing an Association between the European Communities and their Member States, of the one part, and the Arab Republic of Egypt, of the other part, OJ L 304, 30.9.2004, p. 39.

³⁰³ EU-Egypt AA, Chapter 3.

³⁰⁴ Ibid, Art. 71(1).

³⁰⁵ Ibid, Art. 71(2).

³⁰⁶ Ibid, Art. 71(5).

³⁰⁷ Ibid, Art. 71(4).

³⁰⁸ Ibid, Art. 71(6).

³⁰⁹ Ibid, Art. 74.

³¹⁰ This is done by means of provisions that safeguard advantages granted by the parties, either through economic integration agreements (as defined in Article V of the GATS) and measures adopted on their basis, or pursuant to the MFN exemptions annexed by the parties to the GATS and thus covering the EU MFN exemptions regarding the audiovisual. Ibid, Art. 29.

³¹¹ 2000/384/EC, ECSC: Decision of the Council and the Commission of 19 April 2000 on the conclusion of a Euro-Mediterranean Agreement establishing an association between the European Communities and their Member



agreement proclaims the desire of the parties to maintain and intensify dialogue in several areas, including audiovisual matters.³¹² A dedicated title is devoted to cooperation in “audiovisual and cultural matters, information and communication”.³¹³ In particular, the parties undertake to promote cooperation in the audiovisual sector to their mutual benefit,³¹⁴ and to seek ways of associating Israel with EU initiatives in the audiovisual sector, thus enabling cooperation in areas such as co-production, training, development and distribution.³¹⁵ Cooperation between the parties shall also include education, training and youth exchanges,³¹⁶ while culture cooperation shall encompass activities such as translation and art-work and artist exchanges.³¹⁷

The EU-Israel AA includes limited provisions on the right of establishment and services, which refer to the parties’ agreement to widen the scope of the agreement to cover the right of establishment of firms from the one party in the territory of the other party, along with the liberalisation of the terms governing the provision of services by one party’s firms to consumers of services in the other.³¹⁸ An Association Council, established at ministerial level to examine any major issues arising out of the AA and any other issues of mutual interest,³¹⁹ shall issue recommendations to that end.³²⁰ The parties further reaffirm their obligations under the GATS,³²¹ and in particular the obligation to grant reciprocal MFN treatment in the services sectors.³²² However, this does not apply to advantages granted in accordance with the list of MFN exemptions annexed by either party to the GATS,³²³ and thus to the EU exemptions with reference to the audiovisual sector. Similarly, advantages accorded under the terms of an economic integration agreement concluded by the parties in line with Article V of the GATS, or any measures taken on the basis of such an agreement, do not come within the scope of the obligation for reciprocal MFN treatment.³²⁴

States, of the one part, and the State of Israel, of the other part, OJ L 147, 21.6.2000, p. 1; Euro-Mediterranean Agreement establishing an association between the European Communities and their Member States, of the one part, and the State of Israel, of the other part, OJ L 147, 21.6.2000, p. 3.

³¹² EU-Israel AA, Recital 6.

³¹³ Ibid, Title VII.

³¹⁴ Ibid, Art. 58(1).

³¹⁵ Ibid, Art. 58(2).

³¹⁶ Ibid, Art. 59.

³¹⁷ Ibid, Art. 62.

³¹⁸ Ibid, Art. 29.

³¹⁹ Ibid, Art. 67.

³²⁰ Ibid, Art. 29(2).

³²¹ Israel’s schedule of specific commitments for trade in services under GATS includes commitments vis-a-vis audiovisual services.

³²² Ibid, Art. 30(1).

³²³ Ibid, Art. 30(2)(b).

³²⁴ Ibid, Art. 30(2)(a).



Jordan

The EU-Jordan AA was signed in 1997 and entered into force in May 2002.³²⁵ It aims to establish cooperation, supported by a regular dialogue, in audiovisual matters with a view to improving mutual knowledge and understanding.³²⁶ The agreement features a chapter on cultural cooperation and exchange of information,³²⁷ according to which the parties agree to establish ongoing cultural dialogue and promote long-term cultural cooperation in any appropriate field of activity, thus also potentially addressing the audiovisual.³²⁸ In identifying cooperation projects, the parties shall accord special attention to young people, to self-expression and communication skills using written and audiovisual media. Moreover, the EU agrees to extend its existing cultural cooperation programmes to Jordan.³²⁹

The EU-Jordan AA does not include a specific title on services. However, the agreement contains provisions on the right of establishment, while Annex V registers the EU's reservation whereby "national treatment concerning production and distribution, including broadcasting and other forms of transmission to the public, may be reserved to audiovisual works meeting certain origin criteria".³³⁰ In any case, the agreement applies the audiovisual exclusion through reference to the GATS commitments which, rather than being made in the title on services, is made under its general provisions.³³¹ Overall, this means that audiovisual services are not granted MFN or national treatment, and may only be granted right of establishment in the EU depending on "origin criteria" which are not, however, laid out in the agreement.

Lebanon

The EU-Lebanon AA was signed in June 2002 and entered into force in April 2006.³³² Aiming to establish, maintain and intensify cooperation, sustained by regular dialogue, on cultural and

³²⁵ 2002/357/EC, ECSC: Council and Commission Decision of 26 March 2002 on the conclusion of the Euro-Mediterranean Agreement establishing an Association between the European Communities and their Member States, of the one part, and the Hashemite Kingdom of Jordan, of the other part, OJ L 129, 15.5.2002, p. 1; Euro-Mediterranean Agreement establishing an Association between the European Communities and their Member States, of the one part, and the Hashemite Kingdom of Jordan, of the other part, OJ L 129, 15/05/2002, p. 3.

³²⁶ EU-Jordan AA, Preamble, Recital 9.

³²⁷ Ibid, Chapter 3.

³²⁸ Ibid, Art. 85(1).

³²⁹ Ibid, Art. 85.

³³⁰ Ibid, Annex V.

³³¹ Ibid, Arts. 40, 44 and 45.

³³² 2006/356/EC: Council Decision of 14 February 2006 concerning the conclusion of the Euro-Mediterranean Agreement establishing an association between the European Community and its Member States, of the one part, and the Republic of Lebanon, of the other part, OJ L 143, 30.5.2006, p. 1; Euro-Mediterranean Agreement establishing an Association between the European Community and its Member States, of the one part, and the Republic of Lebanon, of the other part, OJ L 143, 30.5.2006, p. 2.



audiovisual issues in order to achieve better mutual understanding,³³³ it devotes a chapter to cultural matters, audiovisual media and information.³³⁴ On cultural cooperation more broadly, the parties agree to promote cultural cooperation in fields of mutual interest and in a spirit of respect for each other's cultures, establishing a sustainable cultural dialogue.³³⁵ As far as audiovisual cooperation is concerned, the parties pledge to promote co-productions and training activities, and to encourage Lebanese participation in EU initiatives in the audiovisual sector.³³⁶ Cooperation of a commercial nature is also foreseen, particularly through joint projects, training, and the exchange of information aimed at promoting the marketing of the parties' audiovisual works and attracting investment in this sector.³³⁷ In identifying cooperation projects and initiatives, special attention is to be accorded to young people, self-expression, heritage conservation issues—which can encompass audiovisual heritage issues, the dissemination of culture, and communication skills using written and audiovisual media.³³⁸ Here, as with Jordan, the EU agrees to extend existing cultural programmes and activities of interest to Lebanon.³³⁹ The audiovisual sector is left out from the provisions on the right of establishment and the supply of services.³⁴⁰

The EU and Lebanon adopted their Partnership Priorities at the EU-Lebanon Association Council on 11 November 2016;³⁴¹ these now serve as the political framework for their relationship. In these priorities, the EU commits to provide relevant technical assistance and capacity-building to Lebanon to further develop its services sector, including in the creative and audiovisual industries, in line with Lebanon's priorities. It also commits to provide support to civil society by funding NGOs for projects focused on cultural development.

³³³ EU-Lebanon AA, Recital 12.

³³⁴ Ibid, Chapter 2.

³³⁵ Ibid, Art. 67(1).

³³⁶ Ibid, Art. 67(2).

³³⁷ Ibid, Art. 67(4).

³³⁸ Ibid, Art. 67(5).

³³⁹ Ibid, Art. 67(3).

³⁴⁰ This is achieved by cross-referring to any commitments and other obligations undertaken under the GATS, with relevant provisions taking effect from Lebanon's accession to the WTO. Ibid, Art. 30(1). The parties also undertake to consider the establishment of an economic integration agreement, as defined in Article V of the GATS. Ibid, Art. 30(3).

³⁴¹ Decision No 1/2016 of the EU-Lebanon Association Council of 11 November 2016 agreeing on EU-Lebanon Partnership Priorities, OJ L 350, 22.12.2016, p. 114.



Morocco & Tunisia

The AA between the EU and Morocco was signed in 2002 and entered into force the same year.³⁴² The EU and Tunisia signed an AA in July 1995 and this entered into force in March 1998.³⁴³ The two AAs are presented here together, as the provisions that outline audiovisual cooperation in each agreement is textually identical. Specifically, in their chapter on cooperation on cultural matters,³⁴⁴ the parties commit to boost mutual knowledge and understanding, taking account of activities already carried out while respecting each other's culture in order to provide a firmer footing for lasting cultural dialogue, and to promote continuous cultural cooperation between them, without ruling out any field of activity a priori.³⁴⁵ They also aim to place special emphasis on young people, written and audiovisual means of expression and communication, the protection of their heritage, and the dissemination of culture.³⁴⁶ Finally, the EU also agrees here to extend cultural cooperation programmes already under way in the EU or one or more of its Member States to Morocco and Tunisia, respectively.³⁴⁷

The provisions of the AAs refer, as does the EU-Israel AA whose signing followed the EU-Tunisia AA, to the parties' agreement to widen the scope of the agreements to cover the right of establishment of firms of one party in the territory of the other party and the liberalisation of the provision of services by one party's firms to consumers of services in the other.³⁴⁸ Here too, Association Councils should issue recommendations to that purpose.³⁴⁹ The parties also reaffirm their obligations under the GATS, with emphasis on their obligations to grant reciprocal MFN treatment in the services sectors,³⁵⁰ but state that this does not apply to advantages granted in accordance with the list of their MFN exemptions annexed to the GATS,³⁵¹ as well as advantages

³⁴² 2000/204/EC, ECSC: Council and Commission Decision of 24 January 2000 on the conclusion of the Euro-Mediterranean Agreement establishing an association between the European Communities and their Member States, of the one part, and the Kingdom of Morocco, of the other part, OJ L 70, 18.3.2000, p. 1; Euro-Mediterranean Agreement establishing an association between the European Communities and their Member States, of the one part, and the Kingdom of Morocco, of the other part, OJ L 70, 18.3.2000, p. 2.

³⁴³ 98/238/EC, ECSC: Decision of the Council and the Commission of 26 January 1998 on the conclusion of a Euro-Mediterranean Agreement establishing an association between the European Communities and their Member States, of the one part, and the Republic of Tunisia, of the other part, OJ EC L 97, 30.03.1998, p. 2; Euro-Mediterranean Agreement establishing an association between the European Communities and their Member States, of the one part, and the Republic of Tunisia, of the other part, OJ EC L 97, 30.03.1998, p. 2.

³⁴⁴ EU-Morocco AA Chapter IV; EU-Tunisia AA, Chapter IV.

³⁴⁵ EU-Morocco AA, Art. 74(1); EU-Tunisia AA, Art. 74(1).

³⁴⁶ EU-Morocco AA, Art. 74(1); EU-Tunisia AA, Art. 74(2).

³⁴⁷ EU-Morocco AA, Art. 74(3); EU-Tunisia AA, Art. 74(3).

³⁴⁸ EU-Morocco AA, Art. 31(1); EU-Tunisia AA, Art. 31(1).

³⁴⁹ EU-Morocco AA, Art. 31(2); EU-Tunisia AA, Art. 31(2).

³⁵⁰ EU-Morocco AA, Art. 32(1); EU-Tunisia AA, Art. 32(1).

³⁵¹ EU-Morocco AA, Art. 32(1)(a); EU-Tunisia AA, Art. 32(1)(a).



accorded under the terms of an economic integration agreement concluded between them in line with Article V of the GATS or any measures taken on the basis of such agreements.³⁵²

In the EU-Morocco Association Council meeting of June 2019, the EU and the Kingdom of Morocco adopted a Joint Declaration in which four structural areas or priorities are defined. One of these is knowledge-sharing, and the priority is focused on inter alia intercultural promotion, strengthening exchanges on cultural policies and industries, training in the artistic sectors, the organisation of cultural and artistic events, and cooperation in the audiovisual and cinema fields. In 2021, at the Trade Policy Review, the EU expressed its commitment to the Deep and Comprehensive Free Trade Area (DCFTA) negotiations with Morocco and Tunisia that have been underway for several years.³⁵³

Palestine

The Interim AA with the Palestinian Authority was concluded in February 1997 and has been in force since July 1997.³⁵⁴ The agreement covers audiovisual and cultural cooperation issues under its title on cooperation on audiovisual and cultural matters, information and communication.³⁵⁵ The parties agree to promote cooperation in the audiovisual sector to their mutual benefit, seeking ways of associating the Palestinian Authority with Union initiatives in this sector, thus enabling cooperation in areas such as co-production, training, development and distribution.³⁵⁶ More generally, wishing to broaden their cultural cooperation, the parties agree to promote activities concerning inter alia translation, art-work and artist exchanges, the training of persons working in the cultural field, and the organisation of European-oriented cultural events.³⁵⁷ The agreement does not provide for the right of establishment or supply of services.

³⁵² EU-Morocco AA, Art. 32(1)(b); EU-Tunisia AA, Art. 32(1)(b).

³⁵³ See: Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, 'Trade Policy Review – An Open, Sustainable and Assertive trade Policy', COM/2021/66 final, <https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=COM:2021:66:FIN>

³⁵⁴ 97/430/EC: Council Decision of 2 June 1997 concerning the conclusion of the Euro-Mediterranean Interim Association Agreement on trade and cooperation between the European Community, of the one part, and the Palestine Liberation Organization (PLO) for the benefit of the Palestinian Authority of the West Bank and the Gaza Strip, of the other part, OJ L 187, 16.7.1997, p. 1; Euro-Mediterranean Interim Association Agreement on trade and cooperation between the European Community, of the one part, and the Palestine Liberation Organization (PLO) for the benefit of the Palestinian Authority of the West Bank and the Gaza Strip, of the other part, OJ L 187, 16.7.1997, p. 3.

³⁵⁵ EU-Palestinian Authority Interim AA, Title VI.

³⁵⁶ Ibid, Art. 56.

³⁵⁷ Ibid, Art. 57.



2.4 Enlargement countries

The EU strategy for enlargement policy, which is increasingly important in geostrategic terms, stands as a pivotal investment in fostering peace, stability, security and prosperity. This approach hinges on equitable and stringent criteria which emphasise “fair and rigorous conditionality”,³⁵⁸ the “principle of own merits”³⁵⁹ and “reversibility”³⁶⁰—the latter being a new notion in the accession process.³⁶¹ During the 2004 and 2007 enlargements, the EU applied significant pressure on candidate countries to meet its accession criteria through a framework of conditionality. Nowadays, the EU appears to have strengthened its oversight and verification mechanisms still more vis-à-vis candidate (and potential candidate) countries (Papakostas, 2012).

Candidate countries must undertake comprehensive reforms across various domains. In this context, an AA between the EU (and its Member States) and the third candidate country provides the framework for initiating and progressing through the accession journey. EU agreements with the Western Balkan countries are specifically termed SAAs.³⁶² EU enlargement into the Western Balkans is considered a very high priority for the Union on the basis of the so-called 2020 “revised enlargement methodology” for the accession negotiations,³⁶³ whereby the Commission and the candidate country work together on a “screening” process that reviews several chapters of the EU acquis. These chapters are grouped into thematic clusters³⁶⁴ and the candidate countries must reform their national laws to match EU rules, including in areas such as electronic communications, information society services and audiovisual services.³⁶⁵ The 2020 revised

³⁵⁸ Conditionality refers to the practice of linking specific conditions or requirements to benefits or incentives, which is often used by the EU to ensure that candidate and potential candidate countries implement necessary reforms in areas such as governance, the rule of law, and human rights, thus achieving full alignment with the EU acquis.

³⁵⁹ In the context of EU enlargement, the principle of own merits refers to the idea that each candidate or potential candidate country's progress toward EU accession is assessed individually on the basis of its unique achievements in meeting the required criteria. This principle ensures that countries are evaluated on their specific reforms and efforts, rather than being compared to or influenced by the progress of others, promoting fairness and encouraging genuine compliance with EU standards.

³⁶⁰ This refers to the possibility that a candidate country's progress toward accession can be reversed or slowed down if it fails to meet the required criteria, or backslides on reforms. This concept means that the EU can suspend or withdraw benefits, such as financial assistance, if a country regresses in areas such as the rule of law, democratic governance, etc., ensuring that progress is sustained and not merely superficial.

³⁶¹ See Council conclusions on enlargement, 12.12.2023, 16707/23, Annex, para. 2.

³⁶² For more information on the EU's Stabilisation and Association Process (SAP) towards the Western Balkans, see: https://neighbourhood-enlargement.ec.europa.eu/enlargement-policy/glossary/stabilisation-and-association-process_en.

³⁶³ Remarks by Commissioner Olivér Várhelyi at the press conference on the revised enlargement methodology, 5.2.2020, https://ec.europa.eu/commission/presscorner/detail/en/statement_20_208.

³⁶⁴ Negotiating chapters are divided into six thematic clusters: fundamentals; the internal market; competitiveness and inclusive growth; the green agenda and sustainable connectivity; resources, agriculture and cohesion; external relations. For more information on the negotiating chapters, see: https://neighbourhood-enlargement.ec.europa.eu/enlargement-policy/glossary/chapters-acquis-negotiating-chapters_en.

³⁶⁵ See Chapter 10 on digital transformation and media at: https://neighbourhood-enlargement.ec.europa.eu/enlargement-policy/conditions-membership/chapters-acquis_en.



methodology introduced the new notion of “gradual integration”, allowing closer cooperation in key areas before full membership, along with stronger partnerships in shared sectors of interest.³⁶⁶ These sectors include culture and the audiovisual.

2.4.1 Western Balkans

All SAAs concluded with the Western Balkans—Albania,³⁶⁷ Bosnia and Herzegovina,³⁶⁸ Kosovo,³⁶⁹ Montenegro,³⁷⁰ North Macedonia,³⁷¹ and Serbia³⁷²—establish frameworks for political dialogue and emphasise regional cooperation across sectors, with a view to fostering stability within both the individual countries and the wider region. The SAAs between the EU and Western Balkan countries share common objectives, such as strengthening democratic institutions, reinforcing the rule of law, and enhancing political, economic and institutional stability. They aim to align national

³⁶⁶ See 2023 Council conclusions on enlargement, para. 14.

³⁶⁷ Council and Commission Decision 2009/332/EC, Euratom of 26 February 2009 concerning the conclusion of the Stabilisation and Association Agreement between the European Communities and their Member States, of the one part, and the Republic of Albania, of the other part, OJ L 107, 28.4.2009, p. 165; Stabilisation and Association Agreement between the European Communities and their Member States, of the one part, and the Republic of Albania, of the other part – Protocols – Declarations, OJ L 107, 28.4.2009, p. 166. Decision 2009/332 came into effect on 26 February 2009 and the SAA has applied since 1 April 2009.

³⁶⁸ Council and Commission Decision (EU, Euratom) 2015/998 of 21 April 2015 on the conclusion of the Stabilisation and Association Agreement between the European Communities and their Member States, of the one part, and Bosnia and Herzegovina, of the other part, OJ L 164, 30.6.2015, p. 548; Stabilisation and Association Agreement between the European Communities and their Member States, of the one part, and Bosnia and Herzegovina, of the other part, OJ L 164, 30.6.2015, p. 2. Decision 2015/998 came into effect on 21 April 2015 and the SAA has applied since 1 June 2015.

³⁶⁹ Council Decision (EU) 2016/342 of 12 February 2016 on the conclusion, on behalf of the Union, of the Stabilisation and Association Agreement between the European Union and the European Atomic Energy Community, of the one part, and Kosovo, of the other part, OJ L 71, 16.3.2016, p. 1; Stabilisation and Association Agreement between the European Union and the European Atomic Energy Community, of the one part, and Kosovo (this designation is without prejudice to positions on status and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence), of the other part, OJ L 71, 16.3.2016, p. 3. Decision 2016/342 came into force on 12 February 2016 and the SAA has been applied since 1 April 2016.

³⁷⁰ Council and Commission Decision 2010/224 (EU/Euratom) of 29 March 2010 on the conclusion of the Stabilisation and Association Agreement between the European Communities and their Member States, of the one part, and the Republic of Montenegro, of the other part, OJ L 108, 29.4.2010, p. 1; Stabilisation and Association Agreement between the European Communities and their Member States, of the one part, and the Republic of Montenegro, of the other part, OJ L 108, 29.4.2010, p. 3. The SAA has applied since 1 May 2010.

³⁷¹ Council and Commission Decision 2004/239/EC, Euratom of 23 February 2004 concerning the conclusion of the Stabilisation and Association Agreement between the European Communities and their Member States, of the one part, and the former Yugoslav Republic of Macedonia, of the other part, OJ L 84, 20.3.2004, p. 1; Stabilisation and Association Agreement between the European Communities and their Member States, of the one part, and the former Yugoslav Republic of Macedonia, of the other part, OJ L 84, 20.3.2004, p. 13. The SAA took effect on 1 April 2004. More than a decade later, Decision 1/2018 marked the transition to the second stage of the SAA (see Decision No 1/2018 of the Stabilisation and Association Council of 4 December 2018 concerning the transition to the second stage of the Association between the European Communities and their Member States, of the one part, and the former Yugoslav Republic of Macedonia, of the other part, pursuant to Article 5(3) of the Stabilisation and Association Agreement [2019/83], OJ L 18, 21.1.2019, p. 51).

³⁷² Council and Commission Decision 2013/490/EU, Euratom of 22 July 2013 on the conclusion of the Stabilisation and Association Agreement between the European Communities and their Member States, of the one part, and the Republic of Serbia, of the other part, OJ L 278, 18.10.2013, p. 14; Stabilisation and Association Agreement between the European Communities and their Member States, of the one part, and the Republic of Serbia, of the other part, OJ L 278, 18.10.2013, p. 16. The SAA has applied since 1 September 2013.



laws with EU standards, support the transition to functional market economies, and promote harmonious economic relations, ultimately leading to the creation of free trade areas with the EU.

Overall, while the goals are similar, there are distinct nuances in each country's EU path. For example, Albania has focused on extensive reforms. Since the 1990s, Albania's political landscape has consistently prioritised integration into the EU. This effort has been viewed not only as a pathway to joining a unified Europe, but also as a crucial driver for fostering domestic stability, promoting economic growth, and reinforcing democratic governance (Nexhipi & Nexhipi, 2019; Kuko, 2004). Albania's reform agenda under the SAA is comprehensive, addressing a wide range of areas from robust political dialogue to the free movement of goods, services, workers and capital, along with joint efforts in the fields of justice and internal affairs (Zahariadis, 2007).

For its part, Montenegro has identified EU membership as its primary strategic and foreign policy objective, and over the years, it has demonstrated notable advancement in meeting the Copenhagen criteria and aligning its legislation with the EU acquis. Consequently, it has emerged as a leading contender in the EU accession process, setting itself apart as the regional forerunner (Vučković, 2021).

Meanwhile, Bosnia and Herzegovina, along with Kosovo, have faced challenges in terms of political stability, with Kosovo's status not recognised by all EU Member States. The issue of standards and status has been a central theme in the EU's relationship with Kosovo since 1999, shaping their interactions in various ways along a challenging path (Economides, 2020).

North Macedonia and Serbia have also navigated complex political landscapes but remain committed to alignment with EU standards. It is noteworthy that efforts were set in motion to normalise relations, restore political dialogue, and foster cooperation between Serbia and the EU in the early 2000s (Acin Cingulinski & Acin, 2009), even though Serbia faced many challenges at that time in establishing its position within Europe (Stahl, 2011).

The SAAs between the EU and the Western Balkan countries share a largely uniform structure, with Title VIII focusing on cultural cooperation, the audiovisual field, and the information society. While the numbers of the specific articles may differ between SAAs, the provisions reflect a common framework aimed at promoting cultural exchange, strengthening the audiovisual sector of the (potential) candidates, and advancing integration with EU digital standards. However, some specific provisions are also worth highlighting.



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All the SAAs emphasise cultural cooperation as a key element of the partnership between the EU and the respective states. In the SAAs with Albania,³⁷³ Bosnia and Herzegovina,³⁷⁴ Montenegro,³⁷⁵ North Macedonia³⁷⁶ and Serbia,³⁷⁷ the provisions highlight the mutual dedication of the parties to enhancing cultural collaboration with a view to deepening mutual understanding and appreciation among people and communities. The parties also agree to cooperate to promote cultural diversity, specifically within the framework of the UNESCO Convention.

A notable difference appears in the EU-Kosovo SAA, which also stipulates that cultural collaboration seeks to strengthen the capacity of cultural operators and deepen mutual understanding among “individuals, minorities, and peoples”.³⁷⁸ Including “minorities” in this provision (and not only “individuals, communities and peoples”, as in other SAAs) is important, given that minorities often have distinct cultural identities, traditions, and practices. Ensuring that all cultural voices are heard is thus shown to be valued and acquires particular significance. Moreover, cultural cooperation in this context also means supporting institutional reforms to encourage cultural diversity, drawing inspiration from the principles outlined in the UNESCO Convention.³⁷⁹

Legal provisions concerning the audiovisual sector are largely consistent across the SAAs. In Albania,³⁸⁰ Bosnia and Herzegovina,³⁸¹ Kosovo,³⁸² Montenegro,³⁸³ North Macedonia,³⁸⁴ and Serbia,³⁸⁵ the parties commit to advancing the European audiovisual landscape and promoting joint productions in cinema and TV.³⁸⁶ This collaboration extends to training initiatives for media professionals and technical support for both public and private media outlets.³⁸⁷ Additionally, the countries have to adjust the regulation of content aspects of cross-border broadcasting to meet EU standards and harmonise their national law with the EU *acquis*.³⁸⁸ Matters relating to the acquisition

³⁷³ EU-Albania SAA, Art. 101.

³⁷⁴ EU-Bosnia and Herzegovina SAA, Art. 101.

³⁷⁵ EU-Montenegro SAA, Art. 103.

³⁷⁶ EU-North Macedonia SAA, Art. 92.

³⁷⁷ EU-Serbia SAA, Art. 103.

³⁷⁸ EU-Kosovo SAA, Art. 108.

³⁷⁹ *Ibid.*

³⁸⁰ EU-Albania SAA, Art. 102.

³⁸¹ EU-Bosnia and Herzegovina SAA, Art. 102.

³⁸² EU-Kosovo SAA, Art. 109.

³⁸³ EU-Montenegro SAA, Art. 104.

³⁸⁴ EU-North Macedonia SAA, Art. 94.

³⁸⁵ EU-Serbia SAA, Art. 104.

³⁸⁶ EU-Albania SAA, Art. 102; Bosnia and Herzegovina SAA, Art. 102; EU-Kosovo SAA, Art. 109; EU-Montenegro SAA, Art. 104; EU-North Macedonia SAA, Art. 94; EU-Serbia SAA, Art. 104.

³⁸⁷ *Ibid.*

³⁸⁸ *Ibid.*



of intellectual property rights for programmes and broadcasts by various means are also singled out.³⁸⁹

Moreover, in all the SAAs, the development of the information society is seen as a critical component of the broader digital integration of the Western Balkans into the EU. The relevant articles—in the case of Albania,³⁹⁰ Bosnia and Herzegovina,³⁹¹ Kosovo,³⁹² Montenegro,³⁹³ North Macedonia,³⁹⁴ and Serbia³⁹⁵—focus on cooperation to strengthen digital infrastructure and align national policies and laws with the EU acquis. This alignment is aimed at attracting investment, modernising networks and services, fostering innovation, and ensuring that these countries can participate fully in the EU's digital single market, which is of considerable importance for the audiovisual and film industries. From this point of view, one could argue that the SAAs' emphasis on digital transformation and alignment with the EU acquis also enhances the accessibility of European audiovisual works in the Western Balkans.

Overall, all these—for the most part, general—provisions in the SAAs with the Western Balkan countries reflect a cohesive approach on the part of the EU to promoting cultural cooperation, audiovisual integration, and the development of the information society in the region. This is reasonable to the extent that the SAAs seek to prepare candidate countries and potential candidates for eventual EU membership by aligning their policies and legal frameworks with EU standards, such as the AVMSD.

2.4.2 The "Association Trio"

The AAs between the EU and Georgia, Moldova, and Ukraine serve as key frameworks for enhancing political association and economic integration. Each AA reflects the specific challenges and aspirations of the respective countries, while pursuing shared goals of democracy, stability and cooperation. The AA with Georgia³⁹⁶ emphasises strengthening political ties, promoting democracy, and fostering economic potential through legislative alignment with EU standards,

³⁸⁹ Ibid.

³⁹⁰ EU-Albania SAA, Art. 103.

³⁹¹ EU-Bosnia and Herzegovina SAA, Art. 103.

³⁹² EU-Kosovo SAA, Art. 110.

³⁹³ EU-Montenegro SAA, Art. 105.

³⁹⁴ EU-North Macedonia SAA, Art. 96.

³⁹⁵ EU-Serbia SAA, Art. 105.

³⁹⁶ Council Decision 2014/494/EU of 16 June 2014 on the signing, on behalf of the European Union, and provisional application of the Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and Georgia, of the other part, OJ L 261, 30.8.2014, p. 1; Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and Georgia, of the other part, OJ L 261, 30.8.2014, p. 4.



alongside the establishment of a DCFTA³⁹⁷ to facilitate incremental integration into the EU's internal market. Similarly, Moldova's AA³⁹⁸ targets the rule of law while reinforcing political stability and engagement with EU initiatives, aiming for close legislative alignment and economic integration—also through a DCFTA. As for the AA with Ukraine,³⁹⁹ this signifies a pivotal phase in Ukraine's relationship with the EU. Replacing the earlier PCA,⁴⁰⁰ its focus on political association and economic collaboration amidst geopolitical shifts shaped the framework for future EU-Ukraine relations.⁴⁰¹ While all three countries share the overarching objectives of promoting freedom, security, and human rights, their distinct political contexts and readiness for EU accession are reflected in their respective agreements.

Georgia

The EU-Georgia AA was signed in June 2014.⁴⁰² Parts of it have been provisionally applied since September 2014, and the AA came into full force in July 2016. The EU-Georgia AA, under Title VI on “other cooperation policies”, includes a chapter on cooperation in the field of information society,⁴⁰³ a chapter on cooperation in the cultural field,⁴⁰⁴ and a chapter on cooperation in the audiovisual and media fields.⁴⁰⁵ The latter stipulates that the parties, among other things, will

³⁹⁷ The DCFTA is central to this AA. Not only does it reduce tariffs for European exporters to Georgia, it also streamlines customs processes, enhancing trade flows. In addition, it paves the way for Georgia to align its legislation, regulations, and standards more closely with EU norms, fostering a more integrated trade relationship over time.

³⁹⁸ Council Decision 2014/492/EU of 16 June 2014 on the signing, on behalf of the European Union, and provisional application of the Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and the Republic of Moldova, of the other part, OJ L 260, 30.8.2014, p. 1; Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and the Republic of Moldova, of the other part, OJ L 260, 30.8.2014, p. 4.

³⁹⁹ Council Decision 2014/295/EU of 17 March 2014 on the signing, on behalf of the European Union, and provisional application of the Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and Ukraine, of the other part, as regards the Preamble, Article 1, and Titles I, II and VII thereof, OJ L 161, 29.5.2014, p. 1; Association Agreement between the European Union and its Member States, of the one part, and Ukraine, of the other part, OJ L 161, 29.5.2014, p. 3.

⁴⁰⁰ Council and Commission Decision 98/149/EC, ECSC, Euratom of 26 January 1998 on the conclusion of the Partnership and Cooperation Agreement between the European Communities and their Member States, of the one part, and Ukraine, of the other part, OJ L 49, 19.2.1998, p. 1; Partnership and Cooperation Agreement between the European Communities and their Member States, and Ukraine, OJ L 49, 19.2.1998, p. 3.

⁴⁰¹ In response to Russia's aggression against Ukraine, on 25 May 2023, the European Parliament and the Council of the European Union adopted Regulation (EU) 2023/1077, which introduced temporary trade liberalisation measures, complementing the trade benefits outlined in the AA, and temporarily suspended existing trade defence measures for a duration of one year. These measures became effective on 6 June 2023, succeeding Regulation (EU) 2022/870. For more information, see <https://eur-lex.europa.eu/EN/legal-content/summary/association-agreement-with-ukraine.html>. Ukraine submitted its application for EU membership in February 2022 and had received EU candidate status by June of the same year. By December 2023, EU leaders had chosen to commence accession negotiations.

⁴⁰² Council Decision 2014/495/Euratom of 16 June 2014 approving the conclusion, by the European Commission, on behalf of the European Atomic Energy Community, of the Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and Georgia, of the other part, OJ L 261, 30.8.2014, p. 744; Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and Georgia, of the other part, OJ L 261, 30.8.2014, p. 4.

⁴⁰³ EU-Georgia AA, Arts 324 to 327.

⁴⁰⁴ Ibid, Arts 362 and 363.

⁴⁰⁵ Ibid, Arts 364 to 367.



encourage co-productions in the domains of cinema and TV as a means to strengthen the audiovisual industries in the EU and Georgia.⁴⁰⁶ Georgia and the EU shall maintain a consistent dialogue in the area of audiovisual and media policies,⁴⁰⁷ and the parties shall concentrate their cooperation on the field of cinema⁴⁰⁸ and dialogue in international fora such as UNESCO and the WTO.⁴⁰⁹ The agreement states that Georgia shall align its legislation with the EU laws and international instruments listed in Annex XXXIII to the AA (namely the AVMSD).⁴¹⁰ However, the audiovisual is excluded from the AA's trade provisions concerning the establishment in economic activities⁴¹¹ and the cross-border supply of services.⁴¹²

Moldova

The AA with Moldova was signed in June 2014.⁴¹³ It came into full force in July 2016. The parts related to the establishment of a DCFTA with the EU have been applied provisionally since September 2014.⁴¹⁴

The EU-Moldova AA, under the title on “economic and other sectoral cooperation”,⁴¹⁵ includes a chapter on cooperation on culture, audiovisual policy and media.⁴¹⁶ This stipulates that the EU and Moldova will establish consistent dialogue and collaborate to enhance the European audiovisual industry, fostering co-production in both cinema and television.⁴¹⁷ In addition, the need for cooperation is stressed in relation to dialogue on cultural and audiovisual policies⁴¹⁸ and dialogue in international fora such as UNESCO and the Council of Europe.⁴¹⁹ The agreement states that Moldova shall align its legislation with EU law and the international agreements listed in Annex XIV (namely the AVMSD and the 2005 UNESCO Convention).⁴²⁰ Cooperation on the development of

⁴⁰⁶ Ibid, Art. 364.

⁴⁰⁷ Ibid, Art. 365(1) and 366(a).

⁴⁰⁸ Ibid, Art. 366(c).

⁴⁰⁹ Ibid, Art. 366(b).

⁴¹⁰ Ibid, Art. 367.

⁴¹¹ Ibid, Art. 78(c).

⁴¹² Ibid, Art. 83(a).

⁴¹³ Council Decision (EU) 2016/839 of 23 May 2016 on the conclusion, on behalf of the European Union, of the Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and the Republic of Moldova, of the other part, OJ L 141, 28.5.2016, p. 28; Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and the Republic of Moldova, of the other part, OJ L 260, 30.8.2014, p. 4.

⁴¹⁴ The preferential trade system has enabled Moldova to enjoy lowered or waived tariffs on its products, expanded access to the EU services market, and improved investment conditions.

⁴¹⁵ EU-Moldova AA, Title IV.

⁴¹⁶ Ibid, Arts 130 to 133.

⁴¹⁷ Ibid, Art. 131(1).

⁴¹⁸ Ibid, Art. 132(c).

⁴¹⁹ Ibid, Art. 132(d).

⁴²⁰ Ibid, Art. 133.



the information society is also stipulated.⁴²¹ At the same time, the audiovisual is excluded from the AA's trade provisions on the establishment of economic activities⁴²² and the cross-border supply of services.⁴²³

Ukraine

The EU and Ukraine share a common border, strong trade ties, and a rich cultural and historical connection (Spiliopoulos, 2014). The AA with Ukraine broadens the application of the EU acquis, incorporating strengthened conditionalities to safeguard the EU's interests (Dimitrova & Dragneva, 2023). Together with the EU's AAs with Moldova and Georgia, it stands out in the Union's practice for its emphasis on comprehensiveness and conditionality (Van der Loo, Van Elsuwege, & Petrov, 2014). The integration framework established by the AA ensures a balanced relationship between the two parties, while setting a new standard for integration agreements. The AA was concluded in July 2017.⁴²⁴ Several of its key components were provisionally implemented starting 1 November 2014,⁴²⁵ and the DCFTA has been in provisional effect since January 2016. The AA entered into full force in September 2017.

The EU-Ukraine AA, under the title on "economic and sector cooperation",⁴²⁶ includes a chapter on audiovisual policy.⁴²⁷ Its provisions emphasise the parties' commitment to collaborating in advancing the audiovisual industry in Europe and fostering co-production in cinema and TV.⁴²⁸ The gradual alignment with EU laws, regulations and the international framework related to audiovisual policies (i.e. the AVMSD and the European Convention on Transfrontier Television of 1989) is outlined,⁴²⁹ with specific details provided in an annex.⁴³⁰ The need for regular dialogue on the issues covered by the audiovisual policy chapter is underscored.⁴³¹ Furthermore, other chapters

⁴²¹ Ibid, Arts 98 to 102.

⁴²² Ibid, Art. 204(c).

⁴²³ Ibid, Art. 209(a). See also Art. 212(2).

⁴²⁴ Council Decision (EU) 2017/1247 of 11 July 2017 on the conclusion, on behalf of the European Union, of the Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and Ukraine, of the other part, with the exception of the provisions relating to the treatment of third-country nationals legally employed as workers in the territory of the other party, OJ L 181, 12.7.2017, p. 1; Association Agreement between the European Union and its Member States, of the one part, and Ukraine, of the other part, OJ L 161, 29.5.2014, p. 3.

⁴²⁵ For instance, provisions on upholding human rights, fundamental freedoms, and the rule of law; engaging in political dialogue and initiating reforms; ensuring justice, freedom, and security; promoting economic and sectoral cooperation, such as in energy, environment, climate action, transport, agriculture, rural development, consumer protection, and fisheries, along with financial cooperation, including measures against fraud.

⁴²⁶ EU-Ukraine AA, Title V.

⁴²⁷ Ibid, Arts 396 to 398.

⁴²⁸ Ibid, Art. 396(1).

⁴²⁹ Ibid, Art. 397.

⁴³⁰ Ibid, Annex XXXVII.

⁴³¹ Ibid, Art. 398.



address cultural cooperation⁴³² and cooperation on the information society.⁴³³ The audiovisual is also addressed in the provisions on intellectual property, where the duration of the protection afforded to cinematographic or audiovisual works⁴³⁴ and of related rights (for producers, etc.)⁴³⁵ is outlined. The audiovisual is excluded from the AA's trade provisions on the establishment in economic activities⁴³⁶ and cross-border supply of services.⁴³⁷

In June 2022, the EU granted Ukraine candidate status, just months after its application. While EU integration typically demands lengthy institutional reforms, enlargement remains a key instrument for driving these changes (Darvas et al., 2024).⁴³⁸

2.4.3 Türkiye

Given the preceding analysis, Türkiye's situation presents a distinctive case, appearing somewhat misaligned with broader collaborative efforts in the European audiovisual sector. The EEC-Türkiye AA of 1963 (the so-called "Ankara Agreement")⁴³⁹ is a long-standing agreement and contains no reference to cultural, film or audiovisual cooperation. The final phase in the development of the parties' relations on its basis was the achieving of a "Customs Union", which is crucial for enhancing trade, promoting economic growth, and fostering closer ties between Türkiye and the EU. Overall, aid to promote culture is considered to be compatible with the Customs Union.⁴⁴⁰

3. EU FUNDING INSTRUMENTS AND THE INTERNATIONAL PROMOTION OF EUROPEAN FILM

The preceding section examined the ways in which the EU has addressed the audiovisual sector in economic and other agreements concluded or under negotiation with third countries as part of the exercise of its external competences. It has done so by identifying the provisions regarding audiovisual cooperation and the provisions that reflect the position of the audiovisual sector in

⁴³² Ibid, Arts 437 to 440.

⁴³³ Ibid, Arts 389 to 395.

⁴³⁴ Ibid, Art. 163.

⁴³⁵ Ibid., Art. 164.

⁴³⁶ Ibid., Art. 87(c).

⁴³⁷ Ibid., Arts 92(a) and 95(2).

⁴³⁸ European Council conclusions, 23-24 June 2022,

<https://www.consilium.europa.eu/en/press/press-releases/2022/06/24/european-council-conclusions-23-24-june-2022/>.

⁴³⁹ 64/732/EEC: Council Decision of 23 December 1963 on the conclusion of the Agreement establishing an Association between the European Economic Community and Turkey, OJ 217, 29.12.1964, p. 3685; Agreement establishing an Association between the European Economic Community and Türkiye, OJ L 361, 31.12.1977, p. 29.

⁴⁴⁰ Decision No 1/95 of the EC-Turkey Association Council of 22 December 1995 on implementing the final phase of the Customs Union, OJ L 13, 17.01.2014, p. 74, Art. 34(3).



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trade facilitation agreements. This section complements this analysis by studying the way EU funding instruments address audiovisual cooperation between the EU and third countries and the internationalisation of the European film industry.

The analysis focuses on two types of EU framework funding schemes. It begins with the EU's funding instrument for the cultural and creative sectors, including the audiovisual industries, which is currently Creative Europe (2021-2027),⁴⁴¹ with emphasis on its Media strand. Initially designed to strengthen the competitiveness of the EU's audiovisual market internally and create a "European audiovisual space" (Crusafon, 2015a) through support for audiovisual projects and activities across and between the Member States, this scheme has evolved to focus directly and explicitly on the internationalisation of European film. The next sub-section traces this evolution, starting with early initiatives in the 1990s and continuing to the present Creative Europe and its Media strand. It highlights the policy objectives and priorities outlined in the respective legislative frameworks that are directly concerned with facilitating access for, and enhancing the presence of, European content in non-EU markets, including through the participation of non-EU countries in Creative Europe, subject to specific conditions for inclusion in the programme.

The analysis then turns to EU external action funding. Addressing regions and countries outside the EU, such funding serves the EU's external policies. Studying the ways in which the EU's external funding instruments address the audiovisual and EU-third-country audiovisual cooperation within their objectives and priorities is key to identifying the role that external action funding plays, if any, in supporting the internationalisation of the EU's audiovisual and film industry. The analysis focuses on the EU's key external action funding instruments covering international cooperation, including development cooperation, and enlargement.⁴⁴² The former includes the NDICI-Global Europe programme⁴⁴³ and its main predecessors, namely the European Development Fund (EDF)⁴⁴⁴ and the Development Cooperation Instrument (DCI),⁴⁴⁵ while the latter

⁴⁴¹ Regulation (EU) 2021/818 of the European Parliament and of the Council of 20 May 2021 establishing the Creative Europe Programme (2021 to 2027), OJ L 189, 28.5.2021, p. 34.

⁴⁴² The analysis does not cover ad hoc funding programmes addressing culture and the audiovisual in individual regions outside these instruments.

⁴⁴³ Regulation 2021/947 of the European Parliament and of the Council of 9 June 2021 establishing the Neighbourhood, Development and International Cooperation Instrument – Global Europe, amending and repealing Decision No 466/2014/EU of the European Parliament and of the Council and repealing Regulation 2017/1601 of the European Parliament and of the Council and Council Regulation 480/2009, OJ L 209, 14.6.2021, p. 1.

⁴⁴⁴ Council Regulation (EU) 2015/322 of 2 March 2015 on the implementation of the 11th European Development Fund, OJ L 58, 3.3.2015, p. 1.

⁴⁴⁵ Regulation 1905/2006 of the European Parliament and of the Council of 18 December 2006 establishing a financing instrument for development cooperation, OJ L 378, 27.12.2006, p. 41.



covers the Instrument for Pre-Accession Assistance (IPA)⁴⁴⁶ addressing acceding countries, candidate countries and potential candidates.

3.1 Funding instruments for the European audiovisual and film industry

Historically, the EU's flagship funding programme for the audiovisual sector has been MEDIA and, subsequently, Creative Europe. The first MEDIA programme,⁴⁴⁷ created in 1990, was primarily an inward-looking programme aimed at funding the domestic audiovisual industry in the Member States in the context of creating the EU's single market and, thereupon, an audiovisual single market. It focused on setting up "intra-European exchanges of films and audiovisual programmes".⁴⁴⁸ Yet, increasing "European production and distribution companies' share of world markets" was also among its aims,⁴⁴⁹ while its list of measures included promotion of "European films outside the Community" through offices for their promotion, films and festivals.⁴⁵⁰

The MEDIA II programme, active between 1996 and 2000, was divided between two strands: one focused on development and distribution,⁴⁵¹ and one on training.⁴⁵² The development and distribution strand was very much concerned with enhancing the single audiovisual market. However, it also sought to directly support the promotion of European programmes and films abroad. More specifically, it aimed to "promote the circulation, in the European Union and outside it, of European television programmes capable of appealing to a European and world audience and to encourage independent European producers and European broadcasters to cooperate in the production of such programmes".⁴⁵³ In addition, it sought "to facilitate the promotion of independent European production and its access to the market by the implementation of promotion services and actions".⁴⁵⁴ To do so, it focused on supporting actions that improve "access for independent producers and distributors to the European and world market through promotion, assistance and bringing enterprises together at commercial events, organised at European and

⁴⁴⁶ Regulation (EU) 2021/1529 of the European Parliament and of the Council of 15 September 2021 establishing the Instrument for Pre-Accession assistance (IPA III), OJ L 330, 20.9.2021, p. 1.

⁴⁴⁷ Council Decision 90/685/EEC of 21 December 1990, concerning the implementation of an action programme to promote the development of the European audiovisual industry (MEDIA, 1991 to 1995), OJ L 380, p. 37.

⁴⁴⁸ MEDIA I, Art. 2.

⁴⁴⁹ Ibid, Art. 2.

⁴⁵⁰ Ibid, Annex 1, measures 1.1.

⁴⁵¹ Council Decision 95/563/EC of 10 July 1995 on the implementation of a programme encouraging the development and distribution of European audiovisual works (MEDIA II - Development and distribution) (1996 to 2000), OJ L 321, 30.12.1995, p. 25.

⁴⁵² Council Decision of 22 December 1995 on the implementation of a training programme for professionals in the European audiovisual programme industry (Media II - Training), OJ L 321, 30.12.1995, p. 33.

⁴⁵³ MEDIA II (Development and distribution), Art. 2.2.

⁴⁵⁴ Ibid.



world level.”⁴⁵⁵ The training strand of MEDIA II did not keep this double national-international perspective, however; it only supported actions that should help “people in the industry adapt to the [...] European dimension of the market”.⁴⁵⁶

The MEDIA Plus Programme (2001-2006) was divided among a “development, distribution and promotion” strand⁴⁵⁷ and a “training” strand.⁴⁵⁸ The former was focused on encouraging “the development, distribution and promotion of European audiovisual works within and outside the [EU]”.⁴⁵⁹ Its objectives featured, in particular, “improvement in the competitiveness of the European audiovisual sector—including small and medium-sized enterprises—on the European and international markets”, with due account taken of the development of new technologies.⁴⁶⁰ Significantly, all three of the programme’s fields—development, distribution and promotion—incorporated objectives with an external dimension. Thus, in the field of development, the programme sought to promote the development of production projects submitted by independent enterprises and aimed at international markets,⁴⁶¹ whereas in the field of distribution, the programme sought, firstly, to foster a wider transnational dissemination of European films on international markets through initiatives to stimulate their distribution and their screening in cinemas, inter alia by encouraging coordinated marketing strategies; and, secondly, to promote, outside the Union, European television programmes produced by independent companies through cooperation between broadcasters and independent European distributors and producers.⁴⁶² In the field of promotion and market access, the programme sought to facilitate the promotion of European audiovisual and cinematographic works at trade shows, fairs and audiovisual festivals around the globe,⁴⁶³ and to encourage the networking of European operators by supporting joint activities on the international markets by national public or private promotion bodies.⁴⁶⁴ Significantly, regarding cooperation with non-European third countries, the programme brought up the concept of “added value”. Cooperation with non-European third countries should not be promoted per se. Rather it should target the enhanced promotion, market access, distribution,

⁴⁵⁵ Ibid, Annex 1.2.3.

⁴⁵⁶ MEDIA II (Training), Annex 1.

⁴⁵⁷ Council Decision 2000/821/EC of 20 December 2000 on the implementation of a programme to encourage the development, distribution and promotion of European audiovisual works (MEDIA Plus - Development, Distribution and Promotion) (2001-2005), OJ L 336, 30.12.2000, p. 82.

⁴⁵⁸ Decision No 163/2001/EC of the European Parliament and of the Council of 19 January 2001 on the implementation of a training programme for professionals in the European audiovisual programme industry (MEDIA-Training) (2001-2005), OJ L 26, 27.1.2001, p. 1.

⁴⁵⁹ Media Plus (Development, Distribution and Promotion), Art. 1(1).

⁴⁶⁰ Ibid, Art. 1(2)(a).

⁴⁶¹ Ibid, Art. 2(a).

⁴⁶² Ibid, Art. 3(b) and (d).

⁴⁶³ Ibid, Art. 4(a).

⁴⁶⁴ Ibid, Art. 4(b).



dissemination and exploitation of European works in third countries⁴⁶⁵ and should develop on the basis of “mutual and balanced interests” including increasing awareness of the cultural diversity of Europe, and promote the spread of common democratic values.⁴⁶⁶ Meanwhile, the “training” strand sought to “give professionals in the European audiovisual programme industry, mainly through continuous vocational training, the necessary skills to allow them to take full advantage of the European and international dimension of the market and of the use of new technologies”.⁴⁶⁷ In this context, particular attention was channelled into providing professionals with “the know-how and skills needed to create competitive products on the European and other markets”.⁴⁶⁸

The MEDIA 2007 programme⁴⁶⁹ (operational until 2013) also had an explicitly international outlook. The programme sought to “strengthen the competitiveness of the European audiovisual sector” and “increase the circulation and viewership of European audiovisual works inside and outside the European Union, including through greater cooperation between players”.⁴⁷⁰ In the development sector, the programme sought in particular to “support the development of production projects intended for the European and international market, submitted by independent production companies”.⁴⁷¹ In the field of distribution, efforts were focused on improving “the circulation of [...] European films on the [...] international markets by incentive measures for export, distribution on any medium and cinema exhibition”.⁴⁷² In the field of promotion, the programme committed to improve “the circulation of European audiovisual works by ensuring that the European audiovisual sector has access to [...] international professional markets”, to improve the “international public's access to European audiovisual works”, and to “encourage the promotion of Europe's cinematographic and audiovisual heritage and the improvement of the public's access to it at [...] [the] international level.”⁴⁷³ To achieve these objectives, the programme defined several specific measures and actions. These included encouraging “cooperation between distributors, producers and sales agents in order to set up international marketing strategies for European films right from the development phase”⁴⁷⁴ and supporting “the side costs (such as financial expenses and insurance) connected with distribution and international sales activities”.⁴⁷⁵ Moreover, it defined

⁴⁶⁵ Ibid.

⁴⁶⁶ Ibid, Recital 38.

⁴⁶⁷ Media Plus (Training), Art. 1.

⁴⁶⁸ Ibid, Art. 2(1)(a).

⁴⁶⁹ Decision 1718/2006/EC of the European Parliament and of the Council of 15 November 2006 concerning the implementation of a programme of support for the European audiovisual sector (MEDIA 2007), OJ L 327, 24.11.2006, p. 12.

⁴⁷⁰ Media 2007, Art. 1(2)(b)-(c).

⁴⁷¹ Ibid, Art. 4(1)(a).

⁴⁷² Ibid, Art. 5(b).

⁴⁷³ Ibid, Art. 6(b)-(d).

⁴⁷⁴ Ibid, Annex, chapter 1, 3.1, operational objective no. 3.

⁴⁷⁵ Ibid, Annex, chapter 1, 3.1, operational objective no. 4.



specific incentive measures to improve the circulation of European films on international markets, such as establishing “a support system for European companies distributing cinema films internationally (sales agents) according to their performance on the market over a given period”.⁴⁷⁶

In addition, in 2009 the MEDIA Mundus⁴⁷⁷ programme was launched with the aim of increasing the competitiveness of the European audiovisual industry, improving access to third-country markets, and building trust and long-term working relationships.⁴⁷⁸ The guiding principle for the international promotion of European films stressed by the programme (operational until 2013) was that of “mutual benefit”⁴⁷⁹ centred on enhanced market access and distribution potential and taking into account the structure and fragmentation of the European market, compared to European film’s large vertically-integrated competitors in international markets. The programme was therefore addressed at European and third-country professionals and aimed to “improve the distribution, circulation and exhibition of European works in third countries and those of third countries within Europe”.⁴⁸⁰ To ensure this mutual benefit, the programme encouraged joint participation by professionals from the EU and third countries, international networking, and the simplification of administrative procedures;⁴⁸¹ supported the organisation of co-production markets and partner search events; and encouraged international sales and the promotion of European works in third-country markets and of audiovisual works from third countries in Europe.⁴⁸² Media Mundus had three specific objectives: strengthening the skills of European and third-country professionals, including through networking;⁴⁸³ enhancing the competitiveness of the European audiovisual industry and the distribution of European works outside Europe;⁴⁸⁴ and improving the circulation and visibility of European works in third countries and those of third countries within Europe.⁴⁸⁵

Since 2014, support for the audiovisual sector has been part of the Creative Europe programmes. The first Creative Europe programme 2014-2020⁴⁸⁶ pooled and replaced the previous Media,

⁴⁷⁶ Ibid, Annex, chapter 1, 3.2, operational objective no. 3.

⁴⁷⁷ Decision 1041/2009/EC of the European Parliament and of the Council of 21 October 2009 establishing an audiovisual cooperation programme with professionals from third countries (MEDIA Mundus), OJ L 288, 4.11.2009, p. 10.

⁴⁷⁸ Media Mundus, Art. 1(2).

⁴⁷⁹ Ibid, Preamble, Recital 13, 15 and 20.

⁴⁸⁰ Ibid, Preamble, Recital 18.

⁴⁸¹ Ibid, Preamble, Recital 20.

⁴⁸² Ibid, Art. 6.

⁴⁸³ Ibid, Art. 5.

⁴⁸⁴ Ibid, Art. 6.

⁴⁸⁵ Ibid, Art. 7.

⁴⁸⁶ Regulation (EU) 1295/2013 of the European Parliament and of the Council of 11 December 2013 establishing the Creative Europe Programme (2014 to 2020) and repealing Decisions No 1718/2006/EC, No 1855/2006/EC and No 1041/2009/EC, OJ L 327, 20.12.2013, p. 221.



Media Mundus and Culture programmes.⁴⁸⁷ Creative Europe was situated within the framework of the 2005 UNESCO Convention and stressed cooperation with international organisations active in the cultural and creative sectors, like UNESCO, the Council of Europe, the OECD and World Intellectual Property Organisation (WIPO).⁴⁸⁸ It was structured around two subprogrammes: a Culture sub-programme that addressed the cultural and creative sectors, and a Media sub-programme supporting the European audiovisual sector. It also included a Cross-sectoral strand which supported transnational policy cooperation between EU Member States.

Recognising that the transnational and international character of the programme is key to strengthening the competitiveness of Europe's cultural and creative sectors, and in particular of its audiovisual sector,⁴⁸⁹ the main priorities of the Media sub-programme included reinforcing the audiovisual sector's capacity to operate transnationally and promoting transnational circulation.⁴⁹⁰ While the main focus was on the EU audiovisual market, the programme also had an explicit international orientation. For instance, it aimed at increasing "the capacity of audiovisual operators to develop European audiovisual works with a potential to circulate in the Union and beyond and to facilitate European and international co-production, including with television broadcasters".⁴⁹¹ It also sought to encourage "business-to-business exchanges by facilitating access to markets and business tools enabling audiovisual operators to increase the visibility of their projects on Union and international markets".⁴⁹²

Thus, the Media sub-programme sought to facilitate European and international co-productions of audiovisual works, to finance activities helping European and international co-production partners come together, and to support international co-productions.⁴⁹³ It also sought to establish systems of support for international sales activities (subtitling, dubbing, and audio description), and to facilitate the circulation of European films on all distribution platforms via international cooperation projects, participation in festivals and other promotional events, and networking.⁴⁹⁴

Currently in force in this programme lineage is the Creative Europe programme 2021-2027.⁴⁹⁵ The programme has two main objectives: to safeguard, develop and promote European cultural and

⁴⁸⁷ EU support for cultural projects and activities has been administered through a single instrument since 2000: Culture 2000 (operational until 2006) and then Culture 2007-2013.

⁴⁸⁸ Creative Europe 2014-2020, Art. 8.

⁴⁸⁹ Ibid, Preamble, Recital 36.

⁴⁹⁰ Ibid, Art. (9).

⁴⁹¹ Ibid, Art. 9(1).

⁴⁹² Ibid.

⁴⁹³ Ibid, Art. 10.

⁴⁹⁴ Ibid.

⁴⁹⁵ Regulation (EU) 2021/818 of the European Parliament and of the Council of 20 May 2021 establishing the Creative Europe Programme (2021 to 2027) and repealing Regulation (EU) No 1295/2013, OJ L 189, 28.5.2021, p. 34.



linguistic diversity and heritage; and to increase the competitiveness and economic potential of the cultural and creative sectors, and in particular the audiovisual sector.⁴⁹⁶ To meet these objectives, the programme also foresees additional financial contributions through the Global Europe programme and the Instrument for Pre-accession Assistance (IPA III) with a view to promoting its international dimension.⁴⁹⁷ Moreover, the programme pledges to foster cooperation between the Union and international organisations and bodies such as UNESCO, the CoE, and the European Audiovisual Observatory.⁴⁹⁸

The programme's Media strand (which replaced the Media sub-programme) acknowledges the importance of a "vibrant European audiovisual industry", and the fact that "competition in global audiovisual markets has been [...] intensified by the deepening digital shift".⁴⁹⁹ It purports to increase collaboration among Member States with different audiovisual capacities and to support European talent, wherever it be located, operating across borders and internationally. Its priorities include enhancing "the circulation, promotion, online distribution and theatrical distribution of European audiovisual works within the Union and internationally in the new digital environment"⁵⁰⁰ and supporting "the engagement and development of audiences of all ages, in particular young audiences, across Europe and beyond".⁵⁰¹ Thus, besides the development, promotion and circulation of European audiovisual works within the Union, the Media strand directly addresses the internationalisation of the European film and audiovisual industry. For instance, the actions supported shall include international sales and the circulation of European works on all platforms, support for networking activities for audiovisual professionals to facilitate the development and distribution of European and international co-creations and co-productions, plus film awards and industry events and fairs in Europe and abroad.⁵⁰²

It is important to note that, much like its predecessors, the Media strand of Creative Europe 2021-2027 is open to non-EU countries. The participation of non-EU third countries was first introduced in the MEDIA II programme and has since become a staple of the EU's audiovisual support programmes. The MEDIA Plus programme was the first to elaborate on the benefits of the participation of non-EU third countries, noting that through the collaboration between Member States and non-EU countries, new European works would be developed that would advance the

⁴⁹⁶ Creative Europe 2021-2027, Art. 3(1).

⁴⁹⁷ Ibid, Art. 8(6).

⁴⁹⁸ Ibid, Recital 35.

⁴⁹⁹ Ibid, Recital 9.

⁵⁰⁰ Ibid, Art. 6(b).

⁵⁰¹ Ibid, Art. 6(c).

⁵⁰² Ibid, Annex I, Section 2.



REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.



emergence of a European audiovisual market.⁵⁰³ It also stressed the benefits of cooperation with non-European third countries “in terms of the promotion, market access, distribution, dissemination and exploitation of European works in those countries”.⁵⁰⁴

Creative Europe 2021-2027 did not modify the standards for the participation of non-EU countries established by its predecessors. It is open to the following third countries, provided that they contribute financially to the Programme: Members of the European Free Trade Association (EFTA) which are members of the European Economic Area (EEA); acceding countries, candidate countries and potential candidates based on their respective framework agreements and Association Council decisions; European Neighbourhood Policy countries based on their respective framework agreements and Association Council decisions; and other third countries.⁵⁰⁵ Participation of the latter is subject to the third countries having a specific agreement with the EU that covers their participation in Union programmes and ensures a fair balance of contributions and benefits, including financial contributions; guarantees the rights of the EU to ensure sound financial management; and does not confer any decision-making power on the third country with respect to the programme.⁵⁰⁶ To participate in the Media strand and Cross-sectoral strand,⁵⁰⁷ the above mentioned countries should also fulfil the conditions set out in the AVMSD.⁵⁰⁸ Moreover, the Programme may support cooperation with third countries other than those listed above with regard to actions financed through additional financial contributions from the external financing instruments, provided this is in the Union’s interest.⁵⁰⁹ At the time of writing, the list of non-EU countries participating in the Media strand are the EFTA countries (Iceland, Norway, Lichtenstein) and most candidate countries (Albania, Bosnia and Herzegovina, Montenegro, North Macedonia

⁵⁰³ Media Plus - Development, Distribution and Promotion, Preamble, Recital 19.

⁵⁰⁴ Ibid, Recital 38.

⁵⁰⁵ Creative Europe 2021-2017, Art. 9(1).

⁵⁰⁶ Ibid, Art. 9(1)(d).

⁵⁰⁷ This mostly supports cross-sectoral transnational policy cooperation; innovative approaches to the creation, distribution and promotion of—and access to—content across cultural and creative sectors and other sectors; cross-sectoral activities aimed at adjusting to the structural and technological changes faced by the media and enhancing a free, diverse, and pluralistic media environment; Programme desks and their activities that stimulate cross-border cooperation and the exchange of best practices within the cultural and creative sectors. See Ibid, Art. 7.

⁵⁰⁸ Ibid, Art. 9(2). Recital 34 specifies that “derogations from the obligation to fulfil the conditions set out in Directive 2010/13/EU should be subject to scrutiny and granted to European Neighbourhood Policy countries in duly justified cases, taking into account the specific situation of the audiovisual market in the country concerned and the level of integration in the European audiovisual policy framework. Progress towards the achievement of the objectives set out in Directive 2010/13/EU should be monitored on a regular basis. Moreover, participation in actions funded by the Media strand should be set out on a case-by-case basis in the relevant work programmes”. Moreover, Art. 9(4) stipulates that members of the EFTA which are members of the European Economic Area, as well as acceding countries, candidate countries and potential candidates “that fully participated in the 2014-2020 Programme may fully participate in the Programme on a provisional basis if they can show that they have taken tangible steps to align their national law to Directive 2010/13/EU, as amended by Directive (EU) 2018/1808.”

⁵⁰⁹ Ibid, Art. 10.



and Serbia).⁵¹⁰ Georgia and Ukraine are participating in specific actions within the Media strand, such as ‘Talent & Skills’,⁵¹¹ ‘European Festivals and Festival Networks’ and ‘Audience Development and Film Education’.⁵¹² Non-EU countries that are neither members of the EFTA nor part of the EEA have had to sign new agreements to participate in the current programme.⁵¹³ These were signed in late 2021 or early 2022, with the agreements entering into force on January 1, 2021.⁵¹⁴

3.2 Funding instruments for external action

3.2.1 International cooperation funding

The NDICI-Global Europe,⁵¹⁵ established in 2021, is the EU’s main instrument for funding EU cooperation with third countries and implementing its external action policies. It brings together and replaces the previous separate funding instruments addressing neighbourhood policies, humanitarian and development cooperation.

Global Europe is based on Article 209 TFEU on development cooperation and Article 212 TFEU on economic, financial and technical cooperation with third countries (other than developing ones), along with Article 322(1) TFEU concerning the adoption of the Union’s financial rules. Support for development cooperation, which is one of the core objectives of Global Europe, was previously served by two instruments targeting developing countries: the European Development Fund (EDF) (up to 2021) and the Development Cooperation Instrument (DCI) (2006-2021). The EDF financed cooperation activities in the ACP group of countries. It was not financed by the EU budget, but by the EU Member States based on negotiated voluntary contributions. It had the stated objective of reducing poverty and contributing to the economic, social or cultural development of the ACP

⁵¹⁰ For more information, see

https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/crea/guidance/list-3rd-country-participation_crea_en.pdf.

⁵¹¹ ‘Talent & Skills’ is part of the ‘Business cluster’ of the Media strand which aims to promote business innovation, scalability and talents across the European audiovisual industry’s value chain. For more information and specific supporting actions, see <https://culture.ec.europa.eu/creative-europe/creative-europe-media-strand/business-cluster>.

⁵¹² These actions come under the ‘Audience cluster’ of the Media strand which associates European audiovisual works with their audiences and boosts audience development across Europe and beyond. Annually, MEDIA supports over 1100 cinemas in 34 countries and connects with 65 million people across borders. For more information and specific supporting actions, see <https://culture.ec.europa.eu/creative-europe/creative-europe-media-strand/audience-cluster>.

⁵¹³ European Commission, Monitoring report: Impact and performance of Creative Europe in 2021-2022, Publications Office of the European Union (2023),

<https://culture.ec.europa.eu/news/monitoring-report-impact-and-performance-of-creative-europe-in-2021-2022>.

⁵¹⁴ The list of non-EU participating countries in the programme is available at:

https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/crea/guidance/list-3rd-country-participation_crea_en.pdf.

⁵¹⁵ Regulation 2021/947.



countries and overseas countries and territories (OCTs).⁵¹⁶ The DCI covered development cooperation with all developing countries (except for those eligible for the Pre-Accession Instrument). However, unlike the EDF, the DCI was financed by the EU budget.⁵¹⁷ It comprised geographic and thematic programmes. The geographic programmes encompassed cooperation with partner countries and regions determined on a geographical basis upon bilateral negotiations.⁵¹⁸ Whereas the audiovisual was not explicitly listed for support, actions supporting the promotion of cultural cooperation and cultural exchanges were eligible to be inscribed in geographic programmes.⁵¹⁹ As for the thematic programmes,⁵²⁰ the DCI programme “investing in people” included provisions on culture addressing areas including the promotion of intercultural dialogue and cultural diversity, as well as international cooperation for enhancing the contribution of cultural industries to economic growth in developing countries.⁵²¹ Support for culture through the geographic and thematic programmes was also provided by the next edition of the DCI, covering the period 2014-2020.⁵²²

As shown by the choice of its legal basis, Global Europe purports to serve several objectives which include: upholding and promoting the Union's values, principles and fundamental interests worldwide; contributing to the promotion of multilateralism and the achievement of the international commitments and objectives the Union has agreed to, such as the Sustainable Development Goals (SDGs), and the Paris Agreement,⁵²³ and promoting stronger partnerships with third countries with a view to fostering stabilisation, good governance and building resilience.⁵²⁴ Nonetheless, at least 93% of its funding shall meet the requirements of the OECD Development Assistance Committee and hence count as Official Development Assistance.⁵²⁵ Moreover, as mentioned earlier (section 4.1), this Programme is designed to act in tandem with the international

⁵¹⁶ The EDF was initially established under Arts 131 and 136 of the Treaty of Rome as the Development Fund for OCTS with historical links with the founding Member States.

⁵¹⁷ The DCI merged and replaced several former instruments with the aim of financing measures aimed at supporting geographic cooperation with the developing countries. See Regulation 1905/2006 of the European Parliament and of the Council of 18 December 2006 establishing a financing instrument for development cooperation, OJ L 378, 27.12.2006, p. 41; Commission Regulation 960/2009 of 14 October 2009 amending Regulation 1905/2006 of the European Parliament and of the Council establishing a financing instrument for development cooperation, OJ L 270/8, 15.10.2009, p. 8.

⁵¹⁸ ACP countries covered by the EDF were not eligible to participate in a geographic programme.

⁵¹⁹ Under the cooperation area of “education”. See Regulation 1905/2006, Art. 5(2)(b)(vi).

⁵²⁰ ACP countries were eligible to participate in the thematic programmes.

⁵²¹ Regulation 1905/2006, Art. 12

⁵²² Regulation (EU) No 233/2014 of the European Parliament and of the Council of 11 March 2014 establishing a financing instrument for development cooperation for the period 2014-2020, OJ L 77, 15.3.2014, p. 44.

⁵²³ For more information see <https://unfccc.int/process-and-meetings/the-paris-agreement>.

⁵²⁴ Regulation 2021/947, Art. 3(1).

⁵²⁵ See

https://international-partnerships.ec.europa.eu/document/download/0996d6c5-01b6-4fc4-a237-84f2d9fb9fb1_en?filename=factsheet-global-europe-ndici-june-2021_en.pdf.



dimension of the Creative Europe programme in order to “foster international cultural relations and recognise the role of culture in promoting European values.”⁵²⁶ Cultural rights are an intrinsic part of the general principles that govern the Global Europe programme,⁵²⁷ while the provision of financial support for culture is foreseen under the two main components through which Global Europe is implemented: its geographic programmes and thematic programmes.

The geographic programmes cover country and multi-country cooperation with third countries in the neighbourhood, Sub-Saharan Africa, Asia and the Pacific, the Americas and the Caribbean. Geographic programmes can cover all third countries apart from candidates and potential candidates and OCTs.⁵²⁸ The geographic programme component has a budget of 63.08 billion EUR⁵²⁹ to finance actions related to specific areas of cooperation.⁵³⁰ Three areas of cooperation foresee support for culture: cooperation in “eradicating poverty, fighting against inequalities and discrimination, and promoting human development”; cooperation on “migration, forced displacement and mobility”; and “inclusive and sustainable economic growth and decent employment”. Specifically, financial support is foreseen for actions that promote cultural diversity, intercultural dialogue and cultural heritage; actions focused on unleashing the economic and social potential of the creative industries; and actions concerned with promoting cultural dialogue between the Union and third countries and regional and international organisations.⁵³¹

The geographic programmes are based on a programming approach with the stated objective of providing a framework for cooperation that is specific to partners’ needs and capacities, whilst considering the impact of EU financing on these countries and regions.⁵³² They are implemented through multiannual country and multi-country indicative programmes.⁵³³ The programming process was concluded in December 2021 with the adoption of geographic Multi-annual Indicative Programmes (MIPs) for the period 2021-2027 for Sub-Saharan Africa, Asia and the Pacific, and the Americas and Caribbean.⁵³⁴

⁵²⁶ Global Europe, Preamble, Recital 34.

⁵²⁷ Ibid, Art. 8.

⁵²⁸ Global Europe, Art. 4. Geographic programmes in the neighbourhood area may cover any of the following countries or territories: Algeria, Armenia, Azerbaijan, Belarus, Egypt, Georgia, Israel, Jordan, Lebanon, Libya, the Republic of Moldova, Morocco, Occupied Palestinian Territory, Syria, Tunisia, Ukraine. Union support under this area may also be used for the purpose of enabling the Russian Federation to participate in cross-border cooperation programmes and in other relevant multi-country indicative programmes (see Ibid, Annex I).

⁵²⁹ Ibid, Art. 6(2)(a).

⁵³⁰ Ibid, Art. 10.

⁵³¹ Ibid, Annex II.

⁵³² Ibid, Art. 4.

⁵³³ Ibid, Arts 14(2) and (3).

⁵³⁴ For more information, see

https://international-partnerships.ec.europa.eu/funding-and-technical-assistance/funding-instruments/global-europe-programming_en.



The review of the geographic MIPs shows that culture is rarely singled out as a priority area for support. For instance, in the MIPs (2021–2027) for the “Association Trio” (Georgia, Moldova and Ukraine), while culture and issues like media independence are occasionally acknowledged (though culture is not explicitly identified as a priority support area), there is little of substance addressing the development of the audiovisual or film industry. A similar situation applies, to a certain extent, regarding the developing countries. There, when support for culture is envisaged, it is included under the priority area of “promoting human development” with an emphasis on enhancing the professionalisation and capacity of cultural and creative professionals in the partner countries. One exception is the multiannual programme for sub-Saharan Africa, which explicitly lists culture as a priority area, with the aim of generating economies of scale along the culture sector value chain, without explicitly addressing the audiovisual. Culture is listed as a transversal element in a few countries, where it is to be integrated into the implementation of the MIP with a view to contributing to job creation and the promotion of intercultural dialogue. Overall, these provisions have a development objective for the partner countries and are not directly concerned with promoting the European cultural or audiovisual industry.

At the same time, MIPs for most of the developing countries surveyed include support for cultural actions among the areas to be addressed by the establishment of so-called “Technical Cooperation Facilities”. The overall aim of such facilities is to assist in the implementation of Global Europe in the partner country concerned and to undertake actions that support its objectives. In countries such as Burkina Faso, Burundi, Cameroon, Chad, Senegal, Congo and Vietnam, the MIPs specify that these facilities shall *inter alia* support public diplomacy, including cultural diplomacy, and facilitate future cooperation. In other cases, as in Botswana, Pakistan, Bolivia and Guatemala, the facilities are envisioned as connected with and leveraging existing EU programmes, such as Creative Europe. They might thus provide opportunities for EU-partner country cooperation in the cultural and audiovisual sectors, and in this context, serve to enhance the visibility of European films and the European audiovisual sector in partner countries.

The geographic programmes are complemented by four thematic programmes which may cover all third countries as well as OCTs.⁵³⁵ With a budget of 6.36 billion EUR,⁵³⁶ the thematic programmes are designed to finance global and transregional actions and initiatives related to the implementation of the SDGs.⁵³⁷ Culture is identified as a distinct area for intervention under the

⁵³⁵ Ibid, Art. 4(3).

⁵³⁶ Ibid, Art. 6(2)(b).

⁵³⁷ Ibid, Arts 4(3) and 6(2)(b).



“Global Challenges” thematic programme.⁵³⁸ The MIP for this programme, adopted towards the end of 2021, aims to “support culture as a driver of sustainable social and economic development and to reinforce cooperation on and the preservation of cultural heritage” in alignment with specific targets of SDG 4 on quality education⁵³⁹ and SDG 8 on decent work and economic growth,⁵⁴⁰ as indicated by the Commission.⁵⁴¹ The MIP also stipulates that the programme shall contribute to the implementation of the UNESCO Convention by supporting the design of policy and regulatory frameworks and data collection.⁵⁴² At the same time, the programme seeks to support initiatives that promote intercultural dialogue through exchanges, partnerships, and other collaborative efforts.⁵⁴³ As such, it might offer opportunities for cooperation between audiovisual professionals from third countries and the EU.

3.2.2 Funding instruments for acceding countries, candidate countries and potential candidates

The Union’s channels its financial and technical assistance to aspiring EU members through mechanisms such as the “Instrument for Pre-accession Assistance” (IPA).⁵⁴⁴ The IPA, which has supported reforms in the enlargement region for many years, aims to enhance the capacities of beneficiary countries throughout their accession journey.⁵⁴⁵

The current beneficiaries of IPA III (2021-2027) include seven of the enlargement countries: Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, Serbia and Türkiye.⁵⁴⁶ Even though IPA III does not explicitly target the film and audiovisual industries, its broader focus

⁵³⁸ Annex III of Global Europe foresees that financial support shall be provided for: actions that support “culture as an engine for sustainable social and economic development”; for initiatives concerned with the preservation of cultural heritage and the development of local crafts; and activities that support “agreements for the return of cultural property to their countries of origin”.

⁵³⁹ Mention is made of target 4.7. This states: “By 2030, ensure that all learners acquire the knowledge and skills needed to promote sustainable development, including, among others, through education for sustainable development and sustainable lifestyles, human rights, gender equality, promotion of a culture of peace and non-violence, global citizenship and appreciation of cultural diversity and of culture’s contribution to sustainable development”.

⁵⁴⁰ Mention is made of target 8.9. This states: “By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products”.

⁵⁴¹ European Commission, ‘NDICI-Global Europe ‘Global Challenges’ thematic programme - Multi-annual indicative programme 2021-2027 (2021), p. 31,

https://international-partnerships.ec.europa.eu/system/files/2022-01/mip-2021-c2021-9157-global-challenges-annex_en.pdf.

⁵⁴² Ibid, p. 22.

⁵⁴³ Global Europe, Annex III(4)(1)(7).

⁵⁴⁴ See European Commission, ‘Overview - Instrument for Pre-accession Assistance,

https://neighbourhood-enlargement.ec.europa.eu/enlargement-policy/overview-instrument-pre-accession-assistance_en.

⁵⁴⁵ From 2007 to 2013, IPA had a budget of 11.5 billion euros which increased to 12.8 billion euros for IPA II covering 2014-2020. See Council Regulation (EC) No 1085/2006 of 17 July 2006 establishing an Instrument for Pre-Accession Assistance (IPA), OJ L 210, 31.7.2006, p. 82 and Regulation (EU) No 231/2014 of the European Parliament and of the Council of 11 March 2014 establishing an Instrument for Pre-accession Assistance (IPA II), OJ L 77, 15.3.2014, p. 11.

⁵⁴⁶ See Regulation (EU) 2021/1529 of the European Parliament and of the Council of 15 September 2021 establishing the Instrument for Pre-Accession assistance (IPA III), PE/67/2021/INIT, OJ L 330, 20.9.2021, p. 1, Annex I.



on competitiveness,⁵⁴⁷ innovation, and digital transformation is likely to have potential spillover effects on these industries.⁵⁴⁸ Strengthening the business environment, supporting the competitiveness of enterprises (especially SMEs),⁵⁴⁹ and improving access to digital technologies create a fertile environment for the cultural and creative industries, including the audiovisual sector. These improvements add to the support offered by Creative Europe for those candidate countries that participate in its Media strand (see section 4.1) and can be expected to enhance local audiovisual capacities.

4. THE PROMOTION OF EUROPEAN AUDIOVISUAL WORKS ON THE INTERNATIONAL SCENE: AN INVENTORY OF RELEVANT PROVISIONS IN EU INTERNATIONAL AGREEMENTS AND FUNDING INSTRUMENTS

The preceding section confirms the EU's long-established strategy of excluding the audiovisual sector from trade obligations in its external trade policy. It also shows that audiovisual cooperation has been a consistent component of the EU's external relations and that relevant provisions regularly feature in its international agreements. The review has identified the pertinent clauses in the economic and non-economic agreements the EU has negotiated with third countries in the exercise of its external competences. It has also identified the nature and degree of support provided by EU funding instruments for the audiovisual and external action to the internationalisation of the European film industry, while safeguarding cultural diversity.

This section organises and categorises findings based on shared characteristics. It does so by compiling an inventory of the principal dimensions addressed by the agreements and funding instruments under study, which have the potential to expand the reach, visibility, and global competitiveness of European audiovisual content and thus enhance its presence worldwide.

⁵⁴⁷ Ibid, Art. 3. On the specific objective of strengthening economic and social development and cohesion, see Article 3(2)(d).

⁵⁴⁸ For instance, the promotion of digital technologies and services, as outlined in Article 3(3)(p) of Regulation (EU) 2021/1529, may support the further digitisation of the film and audiovisual industries, which are increasingly reliant on new technologies for production, distribution, and consumption.

⁵⁴⁹ See Regulation (EU) 2021/1529, Art. 3(3)(o).



4.1 Capacity-building, exchanges and mobility for European audiovisual professionals in third countries

International collaboration, exchanges and mobility help audiovisual professionals gain knowledge of foreign markets and practices and access international career opportunities, new collaborators and audiences (KEA 2018, 11). This dimension focuses on the development of European audiovisual professionals' relevant capacities and experience through provisions in the agreements and funding instruments examined that create opportunities for activities such as capacity-building, training, information exchange, and networking with professionals in third countries as well as international mobility.

Getting to know how high-capacity foreign audiovisual markets operate through exchanges and networking with local teams and mobility opportunities can help European audiovisual professionals carry out international projects. However, the analysed agreements between the EU and developed countries rarely contain provisions addressing these elements. The EU's agreements with Australia and Japan are exceptions to this, as is the PCC annexed to the EU-Korea FTA. The EU-Australia Framework Agreement states that the parties shall encourage, support and facilitate exchanges, cooperation and dialogue between institutions and professionals in the audiovisual and media fields⁵⁵⁰ along with the mobility of culture professionals,⁵⁵¹ while the SPA between the EU and Japan stipulates exchanges of cultural professionals and joint initiatives in various cultural areas, including audiovisual works and films.⁵⁵² The EU-Korea PCC commits the two parties to facilitate the entry into and temporary stay of artists and other cultural professionals and practitioners in each other's territory, for a period up to 90 days.⁵⁵³ It also provides for exchanges between the two parties of audiovisual works.⁵⁵⁴ Relevant activities include encouraging exchanges between broadcasting industries, as well as visits to and participation in international broadcasting events held in each other's territory. Agreements with other developed countries, such as Canada, mention cultural cooperation through people-to-people contacts and exchanges,⁵⁵⁵ without specifying professionals in the audiovisual sector.

Similarly, a few agreements with countries in the EU's neighbourhood also provide for such collaboration and mobility. While the AAs between the EU and countries in this region (such as

⁵⁵⁰ EU-Australia Framework Agreement, Art. 44(6).

⁵⁵¹ Ibid.

⁵⁵² EU-Japan SPA, Art. 41.

⁵⁵³ EU-Korea PCC, Art. 4.

⁵⁵⁴ Ibid, Art. 6.2.

⁵⁵⁵ EU-Australia Framework Agreement, Art. 44(3).



Algeria, Palestine, Egypt and Lebanon) provide for exchanges and the training of professionals working in the cultural field⁵⁵⁶—attesting, perhaps to the close cultural relations these countries have historically developed with the EU (Crusafon, 2015b)—, the audiovisual sector is not explicitly mentioned. At the same time, cooperation in the form of training for audiovisual professionals and the exchange of information and advice is explicitly outlined in isolated cases, such as in the AA with Israel⁵⁵⁷ and the CEPA with Armenia.⁵⁵⁸ The latter also mentions cooperation between the parties through mobility.⁵⁵⁹ Certainly, the fact that, subject to conditions, the Creative Europe programme is open to the participation of European Neighbourhood Policy countries could provide opportunities for networking between European audiovisual professionals and peers from that region. However, none of the neighbouring countries currently participate in the Media strand of Creative Europe 2021-2027.

Developing countries may not be economically strong, yet several have vibrant and culturally diverse film industries with which European audiovisual professionals can engage. This is certainly the case for Latin American and Caribbean countries (Olavarría et al., 2021), and this is reflected in the horizontal provisions of the protocols and agreements on cultural cooperation concluded with this region which are applicable to all cultural sectors, including the audiovisual. The EU-Cariforum PCC, the EU-CA Protocol, and the Cultural Cooperation Agreement with Colombia and Peru all outline the parties' agreement to facilitate the entry and temporary stay of artists and cultural professionals and practitioners from the other party.⁵⁶⁰ Further, both the EU-Cariforum PCC and the CCA with Colombia and Peru stipulate the exchange of practices for digitalizing audiovisual archives.⁵⁶¹ Other opportunities for joint initiatives in training and audiovisual development are provided through the cooperation provisions of the EU-CA AA.⁵⁶²

When it comes to the candidate countries, agreements with the EU acknowledge the importance of cooperation in the audiovisual sector, including through training programmes. SAAs with the countries in the Western Balkans mention the parties' commitment to foster the development of ties between professionals in the audiovisual field through training programmes.⁵⁶³ Yet, none of these agreements mention anything about facilitating mobility for audiovisual professionals. In any

⁵⁵⁶ EU-Algeria AA, Art. 77; EU-Palestine Interim AA, Art. 57; EU-Egypt AA, Art. 71; EU-Lebanon AA, Art. 67.

⁵⁵⁷ EU-Israel AA, Arts 58, 60, 62.

⁵⁵⁸ EU-Armenia CEPA, Art. 98.

⁵⁵⁹ Ibid, Art. 97.

⁵⁶⁰ EU-Cariforum PCC, Art. 3; EU-Colombia and Peru CCA, Art. 5; EU-CA Protocol, Art. 3.

⁵⁶¹ EU-Cariforum PCC, Art. 5(5); EU-Colombia and Peru CCA, Art. 7(5).

⁵⁶² EU-CA AA, Art. 74(4).

⁵⁶³ EU-Albania SAA, Art. 102; Bosnia and Herzegovina SAA, Art. 102; EU-Kosovo SAA, Art. 109; EU-Montenegro SAA, Art. 104; EU-North Macedonia SAA, Art. 94; EU-Serbia SAA, Art. 104.



case, this may not be an obstacle to European audiovisual professionals who wish to network or exchange experience with peers in candidate countries, since such opportunities are provided by the Media strand of Creative Europe in which these countries are eligible to participate, under certain conditions.⁵⁶⁴

Turning to EU financial support instruments, the Media strand of Creative Europe 2021-2027 supports actions devoted to information exchange, training and capacity-building, as did its predecessor. It covers, for instance, activities related to the transnational exchange of experiences and know-how, peer-learning activities, and networking. However, it transpires that these activities are mainly concerned with intra-European exchanges: that is, between Member States, and between Member States and third countries that *participate* in the programme. Media Mundus explicitly and specifically supported the international networking of European audiovisual professionals during the few years in which it was ongoing,⁵⁶⁵ but this line of action was apparently discontinued with the advent of Creative Europe 2014-2020 programme and its Media strand. With respect to EU external funding, the Global Europe Programme pledges to support, through its “Global Challenges” thematic programme, initiatives that promote intercultural dialogue by means of exchanges and partnerships and other collaborative efforts,⁵⁶⁶ but with no explicit link being made to the audiovisual.

4.2 Co-productions

Involving undertakings from two or more countries that finance and produce films, international co-productions can be considered a “gateway to diversity of cultural expressions” (UNESCO, 2016: 10). Indeed, there are many cultural benefits to EU co-productions with international partners, such as blending talent and creative inputs from different territories. Other potential benefits for the European audiovisual and film industry include raising finance through the pooling of resources and risk spreading; reducing production costs through available customs exemptions, tax credits and rebates; and facilitating access to the partner’s market, especially when quota obligations are in effect (Morawetz et al., 2007; Parc, 2020).

First, the mapping carried out in the preceding section suggests that agreements between the EU and third countries do not generally aim to promote or facilitate co-productions between one or

⁵⁶⁴ The Media strand of Creative Europe 2021-2027 purports to support “networking activities for audiovisual professionals, including creators, and business-to-business exchanges to nurture and promote talent in the European audiovisual sector”. See Creative Europe Programme 2021-2027, Annex I, Section 2(f).

⁵⁶⁵ Media Mundus Programme, Art. 5.

⁵⁶⁶ Regulation 2021/947, Annex III(4)(1)(7).



several EU Member States and non-EU countries. One notable exception is the EU-Korea FTA. While the “audiovisual exception” applies to the FTA, this is made without prejudice to the rights and obligations derived from the PCC annexed to it, which provides market access for works co-produced by Korean and EU teams that meet certain criteria, offering reciprocal preferential treatment. The EU-Korea PCC establishes that such co-productions shall qualify as “European works” in the EU and as Korean works in Korea, respectively.⁵⁶⁷ As a result, these works are eligible for inclusion in the quota provisions established by both the EU (through the AVMSD) and Korea to promote their local and regional audiovisual content.⁵⁶⁸ This entitlement for co-productions has been extended by a 2020 Council decision with a view to providing an “opportunity for the European audiovisual industry to maintain its presence and further gain market share, experience and knowledge in the Korean market, which is growing fast”.⁵⁶⁹ Further, the parties agree to encourage the negotiation of new—and the implementation of existing—co-production agreements between one or several EU Member States and Korea, and to grant financial benefits to co-produced works defined in such agreements.⁵⁷⁰ Thus, by dint of this PCC both EU-Korea co-productions as defined in the PCC and co-productions on the basis of EU Member State(s)-Korea co-production agreements can in principle enjoy access to the Korean market.

Another exception is found in the PCC annexed to the EU-Cariforum EPA—although the relevant provisions grant unilateral access to the European audiovisual market for co-productions between the two regions through the requirements for the promotion of European content established under the AVMSD.⁵⁷¹ While the objective of such preferential treatment was to support the development of the audiovisual industry of the Cariforum countries through co-productions with European teams, thereby implementing Article 16 of the UNESCO Convention, such cooperation could also work to the benefit of the European film industry through enhanced distribution opportunities for EU-Cariforum co-productions in the Caribbean markets. Through co-productions with Caribbean teams, the European audiovisual sector would be able to seize marketing and distribution opportunities in the participating Caribbean countries more effectively.

⁵⁶⁷ EU-Korea PCC, Art. 5.

⁵⁶⁸ Ibid.

⁵⁶⁹ European Commission, Proposal for a Council Decision on the extension of the entitlement for co-productions as provided for in Article 5 of the Protocol on Cultural Cooperation of the Free Trade Agreement between the European Union and its Member States, of the one part, and the Republic of Korea, of the other part, COM/2023/23 final, p.3.

⁵⁷⁰ EU-Korea PCC, Art. 5.2.

⁵⁷¹ EU-Cariforum PCC, Art. 5(2)(a).



Second, several agreements explicitly mention co-productions as audiovisual cooperation activities that the parties aim to encourage without, however, establishing measures to facilitate such co-productions. With regard to developing countries, for instance, the negotiation of new co-production agreements--and the implementation of existing ones--is mentioned where protocols or agreements on cultural cooperation are in place. Thus, co-production agreements are foreseen in the EU-Cariforum PCC,⁵⁷² the CCA between the EU Colombia and Peru,⁵⁷³ and in the Protocol attached to the cooperation pillar of the EU-CA AA.⁵⁷⁴ Moreover, across these texts, the parties agree to facilitate access for co-produced works to their respective markets, including through the organisation of festivals or other similar initiatives.⁵⁷⁵ This might help enhance the presence and visibility of co-productions in the respective foreign markets, which could also contribute to the international visibility of European films more broadly.

With regard to enlargement countries, the SAAs with Western Balkan countries and the AAs with the “Association Trio” refer to cooperation in encouraging EU–candidate country co-productions in cinema and TV⁵⁷⁶ without providing any further specification. However, co-productions between the EU and candidate countries that participate in the Media strand of the Creative Europe programme do provide a tangible opportunity for European films to access partners’ markets. As for neighbouring countries, the pattern that emerges from the mapping is far less consistent. While co-productions are not mentioned in agreements with eastern neighbourhood countries, agreements with countries in the EU’s southern neighbourhood, such as Israel, Algeria, Palestine, Egypt and Lebanon, state the parties’ intention to encourage cooperation in audiovisual co-productions – albeit, once again, without further specification.⁵⁷⁷

Overall, support for co-productions between EU Member States and third countries that participate in the relevant programmes has been a consistent priority under Creative Europe. Creative Europe 2014-2020 aimed inter alia to facilitate international co-productions, including with television broadcasters.⁵⁷⁸ Its Media sub-programme sought to finance activities targeting European audiovisual production companies, and independent production companies in particular, with a

⁵⁷² EU-Cariforum PCC, Art. 5(1)

⁵⁷³ EU-Colombia and Peru CCA, Art. 7(1).

⁵⁷⁴ EU-CA Protocol, Art. 5(1).

⁵⁷⁵ EU, Colombia and Peru CCA, Art. 7(2); EU-CA Protocol, Art. 5(2); EU-Cariforum PCC, Art. 5(2).

⁵⁷⁶ EU-Albania SAA, Art. 102; Bosnia and Herzegovina SAA, Art. 102; EU-Kosovo SAA, Art. 109; EU-Montenegro SAA, Art. 104; EU-North Macedonia SAA, Art. 94; EU-Serbia SAA, Art. 104; EU-Georgia AA, Art. 364; EU-Moldova AA, Art. 131(1); EU-Ukraine AA, Art. 396(1).

⁵⁷⁷ EU-Algeria AA, Art. 77; EU-Israel AA, Art. 58(2); EU-Lebanon AA, Art. 67(2); EU-Egypt AA, Art. 67(2); Interim EU-Palestine Interim AA, Art. 56.

⁵⁷⁸ Creative Europe programme 2014-2020, Chapter II, Art. 9.1(b).



view to facilitating European and international co-productions, including in television works.⁵⁷⁹ It has also sought to support activities that help European and international co-production partners come together, and to support audiovisual works co-produced by means of international co-production funds based in a country participating in the programme.⁵⁸⁰ The Media strand of Creative Europe 2021-2027 continues to emphasise support for international co-creations and co-productions⁵⁸¹ as part of its objective to enhance the international competitiveness of European film.

4.3 Production, promotion and distribution of European audiovisual works in third countries

Access to production incentives and effective promotion and distribution beyond the EU are essential to support the internationalisation of the European audiovisual industry. Access to foreign production incentives--particularly in high-capacity international markets--may enhance the appeal of European films for foreign audiences. Meanwhile, promotion and exhibition efforts abroad can help promote European productions and their discoverability among international audiences in cinemas and on audiovisual media services. This dimension thus focuses on provisions in the agreements and funding instruments reviewed which address the international production, distribution and promotion of European audiovisual works and EU-third country cooperation in this respect.

Agreements with developed countries do not address audiovisual cooperation in terms of production, distribution and promotion--with the exception of Korea, thanks to its PCC. Specifically, the PCC foresees that the parties shall grant each other production incentives which include facilitating the rental and leasing of the necessary technical material and equipment,⁵⁸² as well as facilitating the temporary importation of technical material and equipment to carry out the shooting into each other's territory.⁵⁸³ Moreover, the EU-Korea PCC foresees parties promoting their territory as a location for the shooting of cinematographic films and TV programmes.⁵⁸⁴ Provisions aimed at enhancing the promotion and distribution of European works in Korea are also in place, as the parties agree to promote each other's audiovisual works through the organisation of

⁵⁷⁹ Creative Europe programme 2014-2020, Art. 10(c)

⁵⁸⁰ Creative Europe programme 2014-2020, Art. 10(d).

⁵⁸¹ Creative Europe Programme 2021-2027, Annex I, Section 2.

⁵⁸² EU-Korea PCC, Art. 6(4).

⁵⁸³ EU-Korea PCC, Art. 7(2).

⁵⁸⁴ EU-Korea PCC, Art. 6.



REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.



festivals and similar initiatives, as well as to encourage visits to and participation in international broadcasting events held in the territory of the other party.⁵⁸⁵

Protocols and agreements on cultural cooperation with developing countries address only production aspects. The EU-Cariforum PCC, the EU-CA Protocol, and the CCA between the EU, Colombia and Peru indicate that each shall promote its territory as a location for the shooting of cinematographic films and TV programmes.⁵⁸⁶ The integration of these locations into European films could enhance their appeal in the respective regions. The EU-Cariforum PCC and the EU-CA Protocol provide some production incentives with respect to allowing professionals from each other's territory to temporarily import or admit the technical material and equipment necessary to carry out the shooting of cinematographic films and TV programmes.⁵⁸⁷

Turning to the EU's neighbourhood, the agreements with the EU's eastern neighbours (Armenia and Azerbaijan) do not address any of the elements of interest here. Most AAs with the southern neighbourhood countries do include relevant provisions, though they are not consistent across all agreements and not specifically focused on the audiovisual. For instance, the AA with Palestine mentions the organisation of European-oriented cultural events, which may prepare the ground for the promotion of European audiovisual works in Palestine.⁵⁸⁸ The AAs with Lebanon and Egypt refer to cooperation and joint projects in the area of marketing in the cultural sector, perhaps hinting at some openness to facilitating the promotion of European audiovisual works.⁵⁸⁹ Further, the AAs with Lebanon and Egypt address young audiences through cooperation projects, programmes and joint activities, as do the AAs concluded with Jordan, Morocco and Tunisia.⁵⁹⁰ These provisions may also support the promotion of European audiovisual works in the respective countries through the development of European film literacy.

As for enlargement countries, the SAAs and AAs with the EU lack provisions related to cooperation in audiovisual production, promotion and distribution. However, the EU's focus on regulatory alignment as part of the accession process, plus the participation of most of the candidate countries in the Media strand of the Creative Europe programme, may create a favourable environment for the promotion and distribution of European works in these countries, including by increasing audience familiarity and demand.

⁵⁸⁵ EU-Korea PCC, Art. 6(1) and (2)(d).

⁵⁸⁶ EU, Colombia and Peru CCA, Art. 7(4); EU-CA Protocol, Art. 6; EU-Cariforum PCC, Art. 6(1).

⁵⁸⁷ EU-CA Protocol, Art. 7; Cariforum PCC, Art. 6(2).

⁵⁸⁸ EU-Palestine Interim AA, Art. 57.

⁵⁸⁹ EU-Lebanon AA, Art. 61; EU-Egypt AA, Art. 71.

⁵⁹⁰ EU-Lebanon AA, Art. 67(5); EU-Egypt AA, Art. 71(5); EU-Jordan, Art. 85(1); EU-Morocco AA, Art. 74(1); EU-Tunisia AA, Art. 74(2).



Generally speaking, support for the international promotion and distribution of European films has been listed as a priority in audiovisual funding programmes and in particular, the recent ones. The Media sub-programme of Creative Europe 2014-2020, for instance, listed international sales activities--including subtitling, dubbing and audio description, as well as participation in international festivals and other promotional events--among its priorities.⁵⁹¹ These actions are also to be supported under the MEDIA strand of Creative Europe 2021-2027.⁵⁹² Further, the MEDIA strand of the current programme is focused on the development of audiences, in particular young audiences, across Europe and beyond.⁵⁹³

4.4 Audiovisual cooperation in international fora

Working together with non-EU countries in the framework of relevant international organisations may help promote shared priorities and interests in this field at the global level, enhancing audiovisual cooperation and thus creating an environment conducive to the internationalisation of European audiovisual works. This is certainly true of UNESCO, where the EU has been especially active in advocating for the adoption of the 2005 Convention, as well as of the WTO, which sets the rules for global trade.

Overall, the mapping shows that provisions addressing cooperation in international fora are included in both EU funding programmes for the audiovisual sector and international agreements. Concerning the former, Creative Europe aims to support cooperation between the Union and international organisations such as UNESCO, the CoE, and the European Audiovisual Observatory.⁵⁹⁴ As far as international agreements are concerned, with few exceptions, cooperation in such fora, particularly UNESCO, is addressed in economic and non-economic agreements concluded between the EU and third countries across the globe. Cooperation within the framework of UNESCO is stipulated in the protocols and agreements on cultural cooperation with developing countries. Both the protocols on cultural cooperation--namely the EU-Cariforum PCC and the EU-CA Protocol-- and the CCA with Colombia and Peru express, in their preambles, the parties' intention to effectively implement the UNESCO Convention. They also emphasise cooperation within the framework of its implementation, developing actions in line with the

⁵⁹¹ Creative Europe programme 2014-2020, Art. 10.

⁵⁹² Creative Europe programme 2021-2027, Annex I, Section 2.

⁵⁹³ Creative Europe programme 2021-2027, Art. 6(c).

⁵⁹⁴ Creative Europe programme 2021-2027, Recital 35. Note that Global Europe refers, under the geographic programmes, to support for actions that contribute to deepening cultural dialogue between the Union and third countries and regional and international organisations, and to supporting the implementation of bilateral and international commitments. See Global Europe Programme, Annex II.7.



Convention's principles, and notably with Articles 14, 15 and 16. This is not surprising, as these texts are specifically meant to implement the Convention's principles in the EU's external relations. Indeed, the entry into force of the EU-CA Protocol, and of the CCA with Colombia and Peru, was conditional on the ratification of the UNESCO Convention by the participating Central and Latin American countries.⁵⁹⁵ Arguably, the intention of the EU was to ensure a fast ratification of the UNESCO Convention by its foreign partners, so as to build an alliance that endorses its position regarding the treatment of audiovisual services in trade and other international negotiations (Loisen & De Ville 2011, 259–260). Cooperation in relevant international fora, like UNESCO, is also stipulated in the PCA with Vietnam with a view to advancing shared objectives and encouraging the ratification--and reinforcing the implementation--of the Convention.⁵⁹⁶

Cooperation within the UNESCO framework is also foreseen in several agreements with developed countries. To begin with, cooperation within UNESCO and a commitment to implementing the Convention is mentioned in the EU-Korea PCC.⁵⁹⁷ Such a commitment is also set forth in the EU's agreements with Canada, which is not surprising given that both parties demonstrated significant leadership in the adoption of the UNESCO Convention. First, the CETA is the only FTA between the EU and developed countries that mentions the UNESCO Convention, reaffirming the parties' commitment to it.⁵⁹⁸ Second, the SPA with Canada expresses the EU and Canada's shared commitment to protecting and promoting the diversity of cultural expressions through the promotion of the Convention.⁵⁹⁹ Cooperation in international fora, particularly UNESCO, is also envisaged in the agreements between the EU, Japan⁶⁰⁰ and Australia⁶⁰¹ with a view to pursuing common objectives. The UNESCO Convention is not specifically mentioned in this agreement with Japan, however, even though they were signed after its adoption. The Framework Agreement with Australia further stipulates that the parties shall cooperate in the framework of the ASEM and the activities of the ASEF.⁶⁰²

Turning to candidate countries, all the SAAs and AAs concluded with the EU refer to the parties' shared commitment to strengthening cultural collaboration and promoting cultural diversity in line with the UNESCO Convention.⁶⁰³ This may be seen as yet another effort by the EU to build an

⁵⁹⁵ EU-CA Protocol, Art. 9.

⁵⁹⁶ EU-Vietnam PCA, Art. 38(3).

⁵⁹⁷ EU-Korea PCC, Preamble.

⁵⁹⁸ CETA, Preamble, Recital 7.

⁵⁹⁹ EU-Canada SPA, Art. 16.

⁶⁰⁰ EU-Japan SPA, Art. 41.

⁶⁰¹ EU-Australia Framework Agreement, Art. 44(5).

⁶⁰² Ibid, Art. 10

⁶⁰³ EU-Albania SAA, Art. 102; Bosnia and Herzegovina SAA, Art. 102; EU-Kosovo SAA, Art. 109; EU-Montenegro SAA, Art. 104; EU-North Macedonia SAA, Art. 94; EU-Serbia SAA, Art. 104.



alliance around the principles of the UNESCO Convention and to promote its implementation. Cultural cooperation between the EU and the “Association Trio” in international fora also extends to the CoE, while the AA with Georgia specifically refers to audiovisual cooperation between the parties within the framework of the WTO.⁶⁰⁴

As far as neighbourhood countries are concerned, relevant provisions are generally lacking. For the EU’s southern neighbours, this absence may be attributed to the fact that the respective agreements were concluded in the mid-1990s and early 2000s, when the framework for international cooperation on cultural diversity issues was not yet so strongly developed. Regarding the EU’s eastern neighbourhood, cooperation in international fora is explicitly mentioned only in the case of Armenia. The EU-Armenia CEPA foresees that the parties shall cooperate in UNESCO to promote the principles of the 2005 Convention and to promote compliance with its standards as regards the audiovisual.⁶⁰⁵ Additionally, they agree to cooperate in the WTO to support cultural diversity.⁶⁰⁶

4.5 Regulatory cooperation and compliance with the EU acquis in the audiovisual field

Regulatory cooperation between the EU and third countries in the audiovisual sector, specifically in a legally binding form, such as through alignment with the EU internal market acquis, helps to extend the internal audiovisual market beyond the EU’s borders and facilitate audiovisual exchanges and trade between the EU and third countries. It may therefore help European audiovisual works reach third markets and audiences.

The ability to take on the EU’s acquis, including in the audiovisual sector, is a requirement of the EU accession process, subject to conditionality. SAAs with the Western Balkans and AAs with the “Association Trio” seek to integrate these countries into the European audiovisual market by specifying their obligation to meet EU standards and approximate their national laws to the EU acquis, especially vis-à-vis audiovisual media services and intellectual property rights.⁶⁰⁷ As regards the former, the transposition of the AVMSD into the domestic legal order entitles “European works” to benefit from the requirements for the promotion of the distribution and

⁶⁰⁴ EU-Georgia AA, Article 366(b).

⁶⁰⁵ EU-Armenia Enhanced Partnership Agreement, Art. 100.

⁶⁰⁶ EU-Algeria AA, Arts 97; 100.

⁶⁰⁷ EU-Albania SAA, Art. 102; Bosnia and Herzegovina SAA, Art. 102; EU-Kosovo SAA, Art. 109; EU-Montenegro SAA, Art. 104; EU-North Macedonia SAA, Art. 94; EU-Serbia SAA, Art. 104; EU-Georgia AA, Art. 367; EU-Georgia AA, Art. 133; EU-Ukraine AA, Art. 163;



production of European content imposed on providers of audiovisual media services in candidate countries. SAAs with Western Balkan nations also focus on cooperation to strengthen digital infrastructure and align national laws with the EU *acquis* in this field. In addition to their agreements with the EU, Creative Europe requires fulfilment of the conditions set out in the AVMSD for the participation of candidate countries in its Media strand.⁶⁰⁸

Alignment with the EU *acquis* is not explicitly foreseen in the EU's external policy beyond the candidate countries. However, the practice of exporting the *acquis* to neighbouring countries has become an important part of the Union's foreign policy vis-à-vis its neighbourhood (Öberg, 2020). The obligations to apply the internal market *acquis* in individual policy sectors have been gradually incorporated into the agreements concluded by the EU with its neighbouring countries (Öberg, 2020). This observation notwithstanding, the objective of aligning specifically with the EU *acquis* in the audiovisual field is not observed in the agreements with the countries in the EU's southern and eastern neighbourhood. Thus, the parties' intention to promote compliance with European audiovisual and media standards, including those of the UNESCO Convention and the CoE, is stipulated in the EU-Armenia CEPA,⁶⁰⁹ without, however, requiring regulatory alignment in the strict sense. The agreement does, however, stipulate that it is without prejudice to key European conventions concluded under the auspices of the CoE, such as the 1989 European Convention on Transfrontier Television and the 1992 European Convention on Cinematographic Co-Production,⁶¹⁰ it also invites the parties to accede to WIPO's Beijing Treaty on Audiovisual Performances.⁶¹¹

With respect to developed and developing countries, references to regulatory cooperation, even of a non-binding nature, are scant in the agreements studied. In fact, the EU-Korea PCC and the EU-Cariforum PCC are the only documents that contain such references. They mention the parties' intention to ensure the compatibility and interoperability of audiovisual technologies by facilitating the use of international and regional standards.⁶¹² At the same time, Creative Europe seeks to promote regulatory alignment by specifying that neighbourhood countries and other third countries that wish to participate in the programme should fulfil the conditions set out in the AVMSD.⁶¹³ The EU-Japan EPA and the EU-UK TCA pursue regulatory alignment in the field of

⁶⁰⁸ Creative Europe Programme 2021-2027, Art. 9(2).

⁶⁰⁹ EU-Armenia Enhanced Partnership Agreement, Art. 99(1).

⁶¹⁰ Ibid, Art. 151(2).

⁶¹¹ Ibid, Art. 212.

⁶¹² EU-Korea PCC, Art. 6(3); EU-Cariforum PCC, Art. 5(3).

⁶¹³ Creative Europe Programme 2021-2027, Art. 9(2). Recital 34 specifies that "derogations from the obligation to fulfil the conditions set out in Directive 2010/13/EU should be subject to scrutiny and granted to European Neighbourhood Policy countries in duly justified cases, taking into account the specific situation of the audiovisual market in the country concerned and the level of integration in the European audiovisual policy framework. Progress towards the achievement



intellectual property by requiring the parties to make every effort to ratify or accede to the Beijing Treaty on Audiovisual Performances.⁶¹⁴

4.6 Policy dialogue on audiovisual issues

Audiovisual policy dialogue relates to the exchange of information, ideas and expertise among EU and third-country stakeholders, including policymakers, authorities, professionals and civil society. It provides a framework for improving mutual understanding, identifying shared priorities and challenges, and enhancing the implementation of audiovisual cooperation between the EU and third countries.

Policy dialogue is rarely singled out as a form of cultural and audiovisual cooperation in agreements with developed countries. References to such dialogue are only made in the Framework Agreement between the EU and Australia, the SPA between the EU and Japan, and the PCC between the EU and Korea. The EU-Australia Framework Agreement stipulates that the parties shall facilitate cooperation and dialogue between institutions and professionals in the audiovisual and media field,⁶¹⁵ while the EU-Japan SPA mentions civil society and institutional dialogue among cultural stakeholders.⁶¹⁶ The EU-Korea PCC foresees a more structured form of policy dialogue plus the exchange of information on audiovisual matters through the establishment of a Committee on Cultural Cooperation comprising senior officials from the EU and Korean administration.⁶¹⁷ The Committee is charged with overseeing the implementation of the PCC, independently of trade disputes.⁶¹⁸

Protocols and agreements of cultural cooperation with developing countries also foresee structured policy dialogue between the parties through the establishment of specific committees. The CCA between the EU, Colombia and Peru establishes such a dedicated committee, which also includes experts from within the parties' administration.⁶¹⁹ This Committee is tasked with overseeing the implementation of the agreement, ensuring that its objectives are met, and facilitating the inclusion of cultural representatives. The Cooperation Sub-Committee is to follow up

of the objectives set out in Directive 2010/13/EU should be monitored on a regular basis. Moreover, participation in actions funded by the Media strand should be set out on a case-by-case basis in the relevant work programmes.”

⁶¹⁴ EU-Japan EPA, Art. 14(3); EU-UK TCA, Art. 222(2).

⁶¹⁵ EU-Australia Framework Agreement, Art. 44(6).

⁶¹⁶ Ibid, art. 41.

⁶¹⁷ EU-Korea PCC, Arts 2(2) and 3(1).

⁶¹⁸ EU-Korea PCC, Art 3(3).

⁶¹⁹ EU, Colombia and Peru CCA, Art. 4.



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on the implementation of the EU-CA Protocol and discuss audiovisual cooperation issues.⁶²⁰ Such structures, which may support increased policy dialogue with developing countries, are, however, missing from the EU-Cariforum PCC. The EU-Vietnam Comprehensive PCA refers, under its article on cultural cooperation, to the parties' intention to encourage joint initiatives and cooperation activities between their cultural institutions, without explicitly referring to the audiovisual.⁶²¹

As for enlargement countries, none of the SAAs between the EU and Western Balkan candidate countries refers to policy dialogue. Considering that the EU accession process provides opportunities for regular contact between policymakers and other stakeholders, the lack of specific provisions in the SAAs does not necessarily impede audiovisual policy dialogue between the parties. AAs with the "Association Trio", on the other hand, explicitly foresee bilateral policy dialogue and contacts, though the degree of focus on the audiovisual varies. The EU-Moldova AA, for instance, states that the parties shall engage in dialogue on cultural and audiovisual policies,⁶²² while the EU-Georgia AA stipulates consistent dialogue in the area of audiovisual and media policies, including in the field of cinema. The EU-Ukraine AA, on the other hand, makes a brief reference to regular dialogue on the economic and sectoral cooperation issues which it covers.⁶²³

Concerning neighbouring countries, policy dialogue is consistently stipulated in every relevant agreement, although the degree to which such cooperation focuses on audiovisual matters varies here, too. In the eastern neighbourhood, for instance, the EU and Armenia commit to engage in regular policy dialogue in areas of mutual interest, including in the development of audiovisual industries, and to foster the participation of their culture sector and civil society,⁶²⁴ while in the case of Azerbaijan, cultural exchanges among cultural institutions and artists are foreseen.⁶²⁵ As for the southern neighbourhood, the commitments stipulated in the agreements with Jordan, Morocco and Tunisia are similar and framed from the perspective of achieving cultural respect, mutual understanding and knowledge.⁶²⁶ With Lebanon and Egypt, the EU pledges to establish *sustainable* cultural dialogue,⁶²⁷ while with Israel comprehensive policy dialogue includes meetings

⁶²⁰ EU-CA Protocol, Art. 8(7).

⁶²¹ EU-Vietnam PCA, Art. 38(2).

⁶²² EU-Moldova AA, Art. 131(1). See also Art. 132(c).

⁶²³ EU-Ukraine AA, Art. 398.

⁶²⁴ EU-Armenia Partnership Agreement, Art. 96.

⁶²⁵ EU-Azerbaijan PCA, Art. 73.

⁶²⁶ EU-Jordan AA, Preamble, Recital 9; EU-Morocco AA, Art. 74(1); EU-Tunisia AA, Art. 74(1).

⁶²⁷ EU-Lebanon AA, Art. 67; EU-Egypt AA, Art. 71.



between officials and experts; seminars and workshops; technical, administrative and regulatory assistance; and the dissemination of information on cooperation initiatives.⁶²⁸

Policy dialogue between the EU and third countries on audiovisual issues is not explicitly identified as a priority in the current Creative Europe or its predecessor. Creative Europe 2021-2027, for instance, only refers generally to support for “policy dialogue, innovative policy actions and exchange of best practices—including through analytical activities and the provision of reliable data”⁶²⁹ under its Media strand, and to “regular cross-sectoral dialogue among organisations in the cultural and creative sectors and policy makers”.⁶³⁰ However, funding from Global Europe may be used to support Creative Europe’s actions with the aim to foster policy dialogue as part of international cultural relations.⁶³¹

5. THE PROMOTION OF EUROPEAN AUDIOVISUAL WORKS AND FILM ON THE INTERNATIONAL SCENE: AN ASSESSMENT

The preceding analysis has shown that EU audiovisual cooperation with third countries, as well as the international positioning of the European audiovisual industry, is addressed through various EU policies. These include trade policy; cooperation with third countries, encompassing development cooperation, as well as economic, financial, and technical cooperation with developed third countries; neighbourhood policy and enlargement; and cultural policy, particularly in its external dimension. Each of these policies pursues distinct objectives and priorities, as reflected in the agreements negotiated by the EU with the respective third countries and regions, as well as in the audiovisual and external action funding instruments examined. Nevertheless, all of these instruments contain components that have the potential to contribute to the international promotion of European audiovisual works. This section discusses whether such potential has been fully realised and the conditions for doing so.

5.1 EU trade policy and European audiovisual works and film

The analysis of the EU’s trade and economic agreements with third countries that include trade components has shown that the EU has an established position regarding the audiovisual: the audiovisual sector is excluded from core trade liberalisation commitments. The exception is usually

⁶²⁸ EU-Israel AA, Art. 62; EU-Egypt AA, Art. 71.

⁶²⁹ Creative Europe 2021-2027, Section 2.

⁶³⁰ Creative Europe 2021-2027, Section 3.

⁶³¹ Creative Europe 2021-2027, Art. 8(6).



straightforward: it is explicitly stated that the relevant chapters—for instance, the chapters on the cross-border supply of services or investment liberalisation—apply to measures taken by the parties which affect such trade aspects, with the exception of audiovisual services. Only in some of the older AAs entered into with southern neighbourhood countries is the audiovisual exception established indirectly by reference to the parties' positioning in the WTO.

The audiovisual exception constitutes a foundational and consistent position of the EU, applied systematically across all trade agreements. As highlighted by a European Commission official, even prior to the start of formal negotiations—during the preliminary phase, when the negotiating parties define the areas and objectives of the agreement—the EU systematically makes clear to its partners that the audiovisual will be carved out from the chapters on services and investment liberalisation.⁶³² This approach is uniform, regardless of the type of trade agreement examined, whether bilateral or multilateral, or the partner country involved. The EU's stance on this issue is clear, firm, and consistent, and enjoys strong backing from the Member States. This is a position that third countries entering into negotiations with the EU sometimes seek to challenge, but the EU is a staunch supporter of the approach and stands by it, even if doing so may negatively impact broader negotiation outcomes.⁶³³

The fact that the audiovisual is a no-go area when it comes to trade liberalisation reflects the EU's firm commitment to protecting cultural diversity and upholding international obligations, particularly those undertaken within international fora such as UNESCO. It safeguards the policy space necessary for the European audiovisual industry to grow and develop in all its diversity. Indeed, protecting cultural diversity is considered by the EU to be a universal objective, one that the other trading partner(s) should also respect and uphold. The EU is not opening its audiovisual market up through trade liberalisation, nor does it seek its trading partners to open their audiovisual markets up to it—indeed, it would not consent to their doing so. The “chapter by chapter” approach the EU pursues ensures that partner countries are well aware of the EU's exempting position in the audiovisual field (García-Leiva, 2015). This is another aim of excluding the audiovisual from the relevant trade chapters: it prevents the other party from making any commitments in the audiovisual field, even if they so wished.⁶³⁴

Moreover, audiovisual services are excluded from the scope of any provisions dealing with electronic commerce and telecommunications services. This exclusion reinforces the exception of

⁶³² Interview 1: Online interview with European Commission Official, 15 January 2025.

⁶³³ Interview 1.

⁶³⁴ Interview 1.



audiovisual services from trade liberalisation, against the background of convergence spurred by digitalisation which “triggered the erosion of the previously distinct boundaries between the media, the telecommunications and the information technology (IT) sectors” (Burri, 2024: 249). This is also linked to the principle of technological neutrality followed by the EU regarding audiovisual services, which covers all audiovisual services irrespective of the platform and device used for content delivery.⁶³⁵ Concurrently, the audiovisual exclusion extends to digital trade chapters included in more recent agreements. For instance, the title on digital trade of the EU-UK TCA, which includes commitments on the liberalisation of trade by electronic means, expressly states that it does not apply to audiovisual services. The same applies to the EU’s proposed draft chapter on digital trade in the FTA with Australia, which is under negotiation.

5.2 Audiovisual cooperation with third countries and European audiovisual works and film

The exclusion of audiovisual services from the EU’s trade chapters coexists with provisions on audiovisual cooperation between the parties. Such provisions may appear in titles or chapters on cooperation, protocols to agreements concluded by the EU, or in separate standalone agreements. The negotiation of audiovisual cooperation provisions has become a consistent feature of the EU’s approach to audiovisual relations with third countries. However, the specific elements addressed in these provisions vary in terms of their scope and focus.

First, there are some regional differences. For instance, in the case of the EU agreements entered into with candidate countries, namely the AAs and SAAs, audiovisual cooperation addresses exchanges and co-productions, but the emphasis is on regulatory alignment and the uptake of the Union’s acquis. This is a far-reaching process of legislative harmonisation upon which the Union has a lot of leverage.⁶³⁶ This process, which is mostly focused on audiovisual media services, has the effect of creating a regulatory environment that supports the production and distribution of European audiovisual works. As the candidate countries align with EU standards, especially the AVMSD, “European works” benefit from the promotion requirements for European content imposed on linear and non-linear audiovisual media operators and video-on-demand services in the candidate countries.⁶³⁷ This facilitates the flow of European audiovisual works within the markets of

⁶³⁵ This is the approach followed by the AVMSD.

⁶³⁶ Interview 2: Online interview with European Commission Official, 11 April 2025.

⁶³⁷ See Arts 13(1) and 16(1) of the AVMSD. Further, Art. 17 of the AVMSD requires broadcasters to reserve a minimum proportion of at least 10% of their transmission time for European works created by independent producers.



the candidate countries. At the same time, the prominence obligations set forth in the AVMSD support the visibility of European works in on-demand audiovisual services in the candidate countries.⁶³⁸

In the case of developed countries, overall, the agreements examined do not go to great lengths to identify forms of audiovisual cooperation. Provisions regarding people-to-people contacts and exchanges, audiovisual co-productions, access to production incentives, and the promotion and distribution of European works are generally absent from the agreements. Policy dialogue facilitating the exchange of information among the EU and various stakeholders, including policymakers, is also rarely identified as an area for cooperation. Exceptions in this regard are the EU-Australia Framework Agreement, the EU-Japan SPA and the EU-Korea PCC annexed to the EU-Korea FTA. These three instruments, as well as the EU-Canada SPA, also express the parties' commitment to cooperate within the framework of UNESCO. Generally speaking, the EU-Korea PCC stands out among the agreements with developed countries under study in addressing a variety of dimensions that are relevant to audiovisual cooperation and the promotion of European films in the Korean market. Along with the provisions on policy dialogue and cooperation in international organisations mentioned above, the PCC also addresses exchanges, co-productions, production incentives, promotion and distribution activities. Regarding co-productions in particular, the PCC encourages co-production agreements and makes arrangements for EU-Korean co-produced audiovisual works to benefit from financial benefits and from Korean audiovisual support schemes by qualifying as "Korean works" in the Korean market.⁶³⁹

Notwithstanding the above, cooperation by means of co-productions has been limited. There has been little appetite for the signing of co-production agreements between EU Member States and Korea and the realisation of co-productions more broadly (Le Sourd et al, 2013). Since co-productions come within the purview of Member States, it is up to them and their film funds to operationalise cooperation. However, engagement with the implementation of the PCC has been limited. As argued by the Commission, the lack of concrete information about the incentives available pursuant to the PCC may have played a role.⁶⁴⁰ In addition, the criteria whereby co-productions qualify as co-productions under the PCC are quite stringent and not necessarily aligned with industry practices.⁶⁴¹ They require the cooperation of more than two EU

⁶³⁸ See Art. 13(1) of the AVMSD.

⁶³⁹ Ibid, Art. 5(2), (3) and (6).

⁶⁴⁰ European Commission, Proposal for a Council Decision on the extension of the entitlement for co-productions as provided for in Article 5 of the Protocol on Cultural Cooperation of the Free Trade Agreement between the European Union and its Member States, of the one part, and the Republic of Korea, of the other part.

⁶⁴¹ Interview 3: Online interview with European Commission official, 5 February 2025.



parties—presumably to showcase intra-European and transnational cooperation—, which appears to have acted as a disincentive for the industry to engage. In fact, there has been *bilateral* cooperation between Korea and selected EU Member States—both with and without official co-production agreements (Le Sourd, Di Federico Sung-Won Yoon, 2013)—, whereas the Korean film industry has not proved particularly willing to actively pursue co-production, being more focused on the promotion of its own audiovisual works in Europe and beyond.⁶⁴²

Other elements of the PCC regarding audiovisual cooperation have not been followed through, either. For instance, data from the European Audiovisual Observatory reported by the Commission show that, while a fair number of European films are released in Korea, they do not attract significant audiences. In 2021, European films accounted for 23% of the films released theatrically in Korea, but only for 5% of the money taken at the box office.⁶⁴³ This gap between the figures for cinema releases and viewership shows that the EU-Korea cooperation on promotional activities foreseen in the PCC has been insufficient or ineffective. Further, the Protocol's governance framework, and in particular the Cultural Cooperation Committee that was established to oversee implementation, has not managed to motivate interest and address the challenges of collaboration in the audiovisual sector. While the Committee has reportedly held annual meetings to discuss cooperation agendas (Go, 2021: 7), its activities do not seem to have consistently supported the implementation of the PCC.

The cooperation frameworks established by means of cultural cooperation protocols with developing countries have had a similar outcome. The audiovisual cooperation provisions of the EU-Cariforum PCC, the EU-CA Protocol, and the CCA between the EU, Colombia and Peru have been comprehensive, addressing various elements in order to support European films in the respective regions through—in particular—exchanges, policy dialogue and co-productions. Nevertheless, here too implementation has been insufficient. The EU-Cariforum PCC, for instance, the first of its kind, was developed by the Commission as a means to implement the UNESCO Convention on the side of the EU on the basis of a top-down approach that did not involve the Member States and European professional organisations, despite the crucial role they would play in the implementation of its provisions (Vlassis, 2016). The implementation of the Protocol's audiovisual cooperation provisions has also been hindered by the lack of specific financial commitments, particularly considering that developing countries may face challenges in this

⁶⁴² Ibid.

⁶⁴³ European Commission, Proposal for a Council Decision on the extension of the entitlement for co-productions as provided for in Article 5 of the Protocol on Cultural Cooperation of the Free Trade Agreement between the European Union and its Member States, of the one part, and the Republic of Korea, of the other part.



respect. Similar concerns apply with regard to governance aspects. Although the issue of implementation was included on the agenda of the EU-Cariforum EPA Trade and Development Committee, no relevant structures have been put in place (KEA, 2011: 12). As for the EU-CA Protocol and the CCA with Colombia and Peru, specific implementation structures were envisaged in the form of a specialised committee, but there is no indication that these have been active or formed. Overall, the analysis leaves no room for doubt that the audiovisual cooperation provisions of these agreements have remained dead letters. It is perhaps most telling that even Commission officials interviewed for this study, who work in the field, were unaware of their existence, while Commission units with an audiovisual remit had little to say on their implementation.

Cooperation chapters and titles in the agreements concluded with third countries and regions contain provisions that tend to relate to cultural cooperation more broadly, mutual understanding, and cooperation in international fora, specifically UNESCO. In the most recent agreements, mention is also made of the UNESCO Convention as a reference framework. While these provisions lack an explicit focus on the audiovisual, and are considerably less comprehensive compared to the provisions of the protocols and the cultural cooperation agreements discussed above, they could help create enabling conditions for audiovisual cooperation to flourish and support the presence of European films in the third countries concerned. However, relevant provisions are also not implemented. The implementation of such cooperation arrangements—indeed, of any cooperation arrangement—rests on the political will of the parties involved to specify and render them concrete on the basis of mutual interest;⁶⁴⁴ this has not been the case.

The challenges have been two-fold. First, there appears to have been limited interest among the parties in structuring their cooperation. Cooperation has mostly been ad hoc, facilitated by the engagement of EU delegations active in the territory. Second, no governance structures have been established that could support the operationalisation and the implementation of these provisions on a bilateral or regional level. Interviews carried out for this analysis reveal that none of the Commission's services is currently in charge of implementing or monitoring implementation.

Cooperation provisions in SAs and SAAs with candidate countries are a markedly different case. These provisions tend to be implemented, and this is primarily due to the possibility for candidate countries to join the Union's cultural cooperation programmes, subject to conditions. As most candidate countries meet these conditions, the cooperation provisions of the agreements are

⁶⁴⁴ Interview 2.



effectively operationalised through the actions supported by these cultural cooperation programmes.

5.3 EU audiovisual and external action funding and European audiovisual works and film

EU audiovisual support programmes are designed to increase the competitiveness and economic potential of the European audiovisual sector; they also seek to nurture talent, competence and skills. By supporting cross-border co-operation and the circulation of European audiovisual works in the single market, EU audiovisual funding programmes have helped the originally highly fragmented European audiovisual industry to develop and collaborate to promote European works. At the same time, by supporting the EU audiovisual sector, they have also contributed to its capacity to internationalise. Several EU officials and European audiovisual industry representatives interviewed for this study share the view that EU funding has enhanced the international orientation of the European film industry indirectly and as a spillover effect of internal market development. This has been achieved through promoting the professionalisation of the industry across the value chain and by supporting talent and the production of high-quality European films which can achieve success within Europe *and* internationally. Another way in which the audiovisual support programmes have fostered the international profile of the European audiovisual industry indirectly has been by allowing third countries to participate in their actions and activities on an equal footing with EU Member States. The programmes have been opened up, subject to conditions, to candidate countries and potential candidates, members of the EFTA which are members of the EEA, the European Neighbourhood Policy countries and other third countries, with fully-participating third countries enjoying access to all programme actions. This has enabled exchanges and interaction, increasing opportunities for the circulation of European audiovisual works in these countries.

At the same time, the audiovisual support programmes have taken some steps towards directly targeting the internationalisation of European audiovisual works and their presence in third countries. Support for international co-productions is one of the ways in which such direct support has been implemented. International co-productions have received support since the launch of the Media Mundus programme in 2008. In 2014, this line of action passed over to the Media sub-programme of Creative Europe under the International Co-Production Funds scheme. Support was provided to legally establish co-production funds based in an EU Member State or one of the



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third countries eligible to participate in the Media sub-programme whose main activity was supporting international co-productions with the participation of third countries which were not part of the Media sub-programme.⁶⁴⁵ The eligible activities of the co-production funds included: a) international co-productions, intended for cinema release, and b) the distribution of the supported co-productions in at least three territories, of which one was a country participating in the Media sub-programme and one at least was a third country that did not.⁶⁴⁶ The award criteria were the quality of the content and the project team, the impact on the promotion and circulation of co-productions, and the anticipated audience reach,⁶⁴⁷ thus underscoring the scheme's emphasis on supporting projects with strong international exposure prospects and appeal. According to an assessment report by the European Parliamentary Research Service, between 2014 and 2018, the scheme supported 26 projects, each receiving between €205,000 and €400,000 through cascade funding⁶⁴⁸ (Zygierewicz, 2018: 21). Participating organisations reported that the scheme facilitated their international co-productions (European Commission, 2017: 22). There were, nonetheless, concerns that the co-production scheme was somewhat weakened as the Media Mundus programme also supported co-production funds established in third countries, regardless of whether these third countries were part of the Union's Media programme or not at the time. Under the Media sub-programme of Creative Europe 2014-2020, this was no longer possible; this is also the case with Creative Europe 2021-2027 (European Commission, 2017: 78).⁶⁴⁹

The Media strand of the current Creative Europe programme has brought support for international co-productions under its Business Cluster, which is broadly aimed at fostering innovation, scalability and talents across the European audiovisual value chain.⁶⁵⁰ The cluster's 360 Action supports *packages of activities* that facilitate the creation and promotion of European content and the uptake of new technologies or business models.⁶⁵¹ To qualify for support under this action, projects should cover activities that address at least two of the following activities: training activities, promotion and networking, audience activities, and international co-productions through

⁶⁴⁵ See: Support to International Co-production Funds 2014-2020, Creative Europe - EACEA 43/2014, Creative Europe - EACEA 29/2019,

https://www.eacea.ec.europa.eu/grants/2014-2020/creative-europe/support-international-co-production-funds-2014-2020_en.

⁶⁴⁶ See Support to International Co-production Funds 2014-2020.

⁶⁴⁷ See Support to International Co-production Funds 2014-2020.

⁶⁴⁸ Cascade funding is a mechanism where the entity that receives the funding is responsible for managing and distributing them to the final beneficiaries.

⁶⁴⁹ Interview 4: Online interview with European Commission official, 9 January 2025.

⁶⁵⁰ The Media strand of Creative Europe 2021-2027 is structured around 4 clusters: Content, Business, Audience, and Policy Support and Awareness Raising. See: <https://culture.ec.europa.eu/creative-europe/creative-europe-media-strand>.

⁶⁵¹ See Media 360 call for proposals, https://pact-for-skills.ec.europa.eu/stakeholders-and-business/funding-opportunities/media-360deg_en.



co-production funds.⁶⁵² While it could be argued that the fact that international co-productions are no longer offered as a standalone funding priority may undermine the visibility of support and industry interest in undertaking co-productions, the record to date suggests otherwise. According to the Commission, the 360 Action has so far supported, through co-production funds, around 90 films co-produced with third countries (i.e. countries not participating in the Media strand of Creative Europe), the majority of them developing countries.⁶⁵³ The level of EU funding each film received (between €20,000 and €60,000) hints at rather low-budget international co-productions. However, the integration of support for international co-productions with other relevant activities, especially promotion and networking, and the fact that the applicants can present a global integrated strategy, along with the requirement that implementing organisations should be recognised European entities which are able “to attract a large European and international participation”,⁶⁵⁴ can enhance the sustainability of the supported international partnerships and thus the access of supported co-productions to foreign markets.

Moreover, the Content Cluster of the current Media strand incorporates *facilitating* international co-productions as a cross-cutting objective of some actions. The Content Cluster is broadly aimed at encouraging cooperation and innovation in development and production.⁶⁵⁵ Its TV and Online Content action—the only action where the Media strand participates in the financing of works at the production stage—supports works intended for linear and non-linear broadcasting, including digital platforms, which have broad cross-border exploitation potential and can reach audiences at European and international levels.⁶⁵⁶ This line of action is certainly to be welcomed for its aspiration to attract wider audiences, beyond just cinema goers, in third countries. Then there is the Slate Development action, which supports independent European production companies with significant experience and capacity in developing (i.e. pre-producing) a slate of (3-5) audiovisual works, including international co-productions if they so wish, at a time.⁶⁵⁷

As regards the international promotion of European works, the Media strand runs Umbrella Stands at some major international trade fairs for film and audiovisual content in Europe, providing European producers and distributors the opportunity to meet and engage in business-to-business exchanges with international peers.⁶⁵⁸ Promotion support is also provided through the Markets and

⁶⁵² See [MEDIA 360° \(CREA-MEDIA-2022-MEDIA360\)](#) call for proposals.

⁶⁵³ Data provided by Commission Official on 16 January 2025.

⁶⁵⁴ See [MEDIA 360° \(CREA-MEDIA-2022-MEDIA360\)](#) call for proposals.

⁶⁵⁵ See <https://culture.ec.europa.eu/creative-europe/creative-europe-media-strand/content-cluster>.

⁶⁵⁶ See [TV and online content \(CREA-MEDIA-2024-TVONLINE\)](#) call for proposals.

⁶⁵⁷ See the [European slate development \(CREA-MEDIA-2022-DEVSLATE\)](#) call for proposals.

⁶⁵⁸ Participants are selected via calls for interest published on the Media stands webpage. See: <https://www.media-stands.eu/>.



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Networking and European Film Sales actions, both under the Business Cluster. The Markets and Networking action, which was originally launched under the Media Mundus Programme under the title Access to Markets, supports the presence of European audiovisual professionals in international business-to-business (B2B) opportunities.⁶⁵⁹ Eligible activities—in line with the calls for proposals that have been published so far—include professional networking and access to professional trade events and markets, both physical and online, within but also outside the countries participating in the Media strand.⁶⁶⁰ Selected projects take place at major international audiovisual industry events, such as co-production platforms, pitching forums, film markets and festivals both in Europe and in key third countries.⁶⁶¹ These actions are highly valued by stakeholders for improving access for European films and professionals—especially independent companies and those from smaller countries—in competitive third-country markets, such as those of North America.⁶⁶² Without this support, many of these films would be unable to secure the resources required to enter these markets.⁶⁶³

Turning to international collaboration and training opportunities, while these may not be presented as standalone elements, they are embedded within the actions of the current Media strand. The European Media Talent and Skills action of the Business Cluster supports physical and online training courses, bootcamp courses, and mentoring programmes to help audiovisual professionals adapt to new creative processes and business models. Relevant calls invite inter alia applications for training, mentoring and capacity building activities which aim at strengthening international cooperation and the capacity of audiovisual professionals to integrate an international dimension into their work.⁶⁶⁴ These actions can be open for some participants from countries which are not participating in the Media strand,⁶⁶⁵ thus facilitating the exchange of good practices and knowledge-sharing between European audiovisual professionals and peers from third countries.

However, the current media strand lacks an explicit international focus when it comes to supporting sales and distribution activities. The Business Cluster encompasses sales and distribution actions through the European Film Sales⁶⁶⁶ and the European Film Distribution⁶⁶⁷

⁶⁵⁹ <https://culture.ec.europa.eu/creative-europe-media-strand/business-cluster>.

⁶⁶⁰ See: [Markets & networking \(CREA-MEDIA-2022-MARKETNET\)](#) and [Markets & Networking \(CREA-MEDIA-2024-MARKETNET\)](#) calls for proposals.

⁶⁶¹ See: projects funded by the [Markets & networking \(CREA-MEDIA-2022-MARKETNET\)](#) and [Markets & Networking \(CREA-MEDIA-2024-MARKETNET\)](#) calls.

⁶⁶² Interview 5: Online interview with representative of film promotion NGO, 18 March 2025.

⁶⁶³ Ibid.

⁶⁶⁴ See: projects funded by the [Fostering European media talents and skills \(CREA-MEDIA-2022-TRAINING\)](#) calls.

⁶⁶⁵ Interview 6: Online interview with European Commission Official, 21 January 2025.

⁶⁶⁶ See the [European Film Sales \(CREA-MEDIA-2023-FILMSALES\)](#) call.

⁶⁶⁷ See the [European Film Distribution \(CREA-MEDIA-2024-FILMDIST\)](#) call.



actions, which offer add-on financing based on beneficiaries' performance *within* the European market. Both these actions aim at strengthening vertical industry integration and improve the competitive position of non-national European films within Europe and across the countries that participate in the Media strand.⁶⁶⁸ Accordingly, the eligible beneficiaries are distributors and sales agents that are established in the EU and other countries that participate in the Media strand or committed to distributing and promoting EU films in these countries. Nevertheless, beneficiaries mention positive spillover effects on the international positioning of European films, as these actions help build distribution strategies that can apply to other countries too.⁶⁶⁹ Moreover, while these actions prioritise the internal market and lack an explicit focus on third countries, beneficiaries are not in practice restricted from allocating some of these funds to support sales and distribution in non-EU markets.⁶⁷⁰ Other actions of the Media strand, such as actions related to audience development (i.e. the Audience Cluster)⁶⁷¹ and regulatory and policy dialogue (i.e. the Policy Support Cluster),⁶⁷² are also focused on the internal market and co-operation across the participating countries.⁶⁷³

External action funding has, until recently, been used to support specific programmes for the audiovisual sector in ACP and Mediterranean countries. Audiovisual programmes targeting ACP countries were funded by the EDF and were implemented by the Secretariat of the ACP Group of States. They aimed at enhancing cooperation between the EU and these countries in audiovisual matters and, as such, could be regarded as precursors to the inclusion of audiovisual cooperation provisions in the EU's international agreements and protocols with countries in the region, and subsequently as elements contributing to the implementation of those provisions.⁶⁷⁴ At the same time, in line with the priorities of the EDF and the Cultural Agenda regarding culture in the EU's development policy, their focus was mainly on helping ACP countries build up and strengthen their audiovisual markets, rather than on enhancing the presence of the European audiovisual industry in the region and its competitiveness on the basis of mutual benefit (European Policy Evaluation Consortium, 2008: 1). The first programme, the EU-ACP Support Programme for Cinema and the

⁶⁶⁸ Note, for instance, that under the European Film Sales action, international means across the countries participating in the Media strand. For instance, one eligible activity is investing in the acquisition of international sales rights for non-national European films, but it is specified that a sales contract/agreement is considered to be international if it provides for the right of the sales agent to sell the film in at least 10 countries participating to the Media strand. See: [European Film Distribution \(CREA-MEDIA-2024-FILMDIST\)](#) call.

⁶⁶⁹ Interview 7: Online interview with film sales industry representative, 2 April 2025.

⁶⁷⁰ Interview 4.

⁶⁷¹ <https://culture.ec.europa.eu/creative-europe/creative-europe-media-strand/audience-cluster>.

⁶⁷² <https://culture.ec.europa.eu/creative-europe/creative-europe-media-strand/policy-support-cluster>.

⁶⁷³ One exception concerns membership of, and cooperation with, the European Audiovisual Observatory under the Policy Support cluster.

⁶⁷⁴ Interview 8: Online interview with European Commission Official, 19 March 2025.



Audiovisual Industry (ACPFilms) was launched in 2008 to support the capacity of audiovisual industries in ACP countries to produce and distribute their own films (European Commission, 2010; 2016).⁶⁷⁵ In parallel, the EU-ACP Cultural Industries Support Programme (ACPCultures) was established to support capacity-building activities for professionals in the creative industries, but excepting the audiovisual. These programmes were succeeded by the ACP-EU Support Programme to Cultural sectors (ACPCultures+), which was funded under the 10th EDF and addressed the whole cultural and creative sector, including the audiovisual. ACPCultures+ intended to contribute to the fight against poverty through the development of sustainable cultural industries in ACP countries. This was followed by ACP-EU towards a viable cultural industry programme (ACP-EU Culture) which aimed, initially for the period 2019-2024, at boosting the potential of the cultural and creative sector and its contribution to the social and economic development of ACP countries.⁶⁷⁶ The types of actions supported by the programme with regard to the audiovisual included the production of cinema and audiovisual works in the ACP countries, the promotion, distribution and networking of the cinema and audiovisual sector in the ACP countries, and the professional development of ACP audiovisual professionals.

Audiovisual cooperation with Southern Mediterranean, African and Middle Eastern countries⁶⁷⁷ was funded by the European Neighbourhood and Partnership Instrument and its predecessor, the MEDA instrument.⁶⁷⁸ Such cooperation was initially proposed at the Intergovernmental Conference on Euro-Mediterranean Audiovisual Cooperation, held in Thessaloniki in 1997 (Psychogiopoulou, 2005). Following this, three regional programmes were established: Euromed Audiovisual I (2000-2004), Euromed Audiovisual II (2005-2008)⁶⁷⁹ and Euromed Audiovisual III (2009-2014);⁶⁸⁰ they were managed by the Directorate-General for Development and Cooperation – EuropeAid, the body then responsible for designing and implementing the EU's external aid programmes. While the focus of these programmes was also on enhancing the development of the audiovisual and cinema sectors in the partner countries, some of their objectives were also driven by the goal of promoting common values and mutual benefit. For instance, Euromed Audiovisual II sought *inter alia* to encourage the distribution within the EU of films originating in Mediterranean partner countries, as well as European films within Mediterranean countries (European Policy Evaluation

⁶⁷⁵ They were implemented by the Secretariat of the ACP Group of States.

⁶⁷⁶ See the programme website <http://www.acp-ue-culture.org>.

⁶⁷⁷ These were: Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria, Tunisia, Turkey.

⁶⁷⁸ Council Regulation 1488/96 of 23 July 1996 on financial and technical measures to accompany the reform of economic and social structures in the framework of the Euro-Mediterranean partnership (MEDA), OJ L 189, 30.7.1996, p. 1.

⁶⁷⁹ <https://south.euneighbours.eu/project/euromed-audiovisual-euro-mediterranean-audiovisual-co-operation/>.

⁶⁸⁰ <https://south.euneighbours.eu/project/euromed-audiovisual-iii/>.



Consortium, 2008: 2). Support was implemented through various activities, including training, film promotion, distribution and exhibition activities, and the provision of technical assistance (European Policy Evaluation Consortium, 2008: 2).

Turning to the present, the Global Europe programme does not explicitly earmark funding for regional audiovisual cooperation between the EU and third countries. The only regional MIP to include a culture envelope (see section 4.2.1) was the Sub-Saharan Africa MIP. Following on that, one relevant programme, Creative Africa: Audiovisual, which addresses Sub-Saharan Africa, is foreseen.⁶⁸¹ The programme aims to strengthen the region's audiovisual industry and foster job creation through “mutually beneficial partnerships between Africa and the EU, promoting cultural diversity and strengthening regional ecosystems”. Although the programme is still under development and its specific modalities have yet to be defined, Commission officials have indicated that it will prioritise cooperation between the EU and partner countries across the audiovisual value chain, with particular emphasis on digital innovation.⁶⁸² As to thematic programmes, although the thematic programme Global Challenges identified culture as a priority, no programmes targeting audiovisual cooperation have so far been launched.⁶⁸³

6. CONCLUSION

The European audiovisual and film sectors are situated at the crossroads of the economy and the cultural realm. The analysis has shown that the dual nature of the audiovisual and film industries has required recognition at the international level. To counterbalance the one-sided approach advanced by the GATT/WTO to cultural content, the UDCD, the UNESCO Convention and the CoE legal instruments on cinematographic co-productions have embraced the notion of cultural diversity, cultural exchanges and interaction. They have created an international framework which acknowledges the cultural dimension of audiovisual and cinematographic works, and in so doing have also legitimised the values championed by the EU and its Member States regarding the audiovisual. The EU policy instruments examined in the context of this study showcase the Union's efforts to balance the economic dimension of European audiovisual works and film with cultural

⁶⁸¹ Commission Implementing Decision of 4.6.2024 on the financing of the multiannual action plan in favour of Sub-Saharan Africa for 2024-2025, C(2024) 3825 final.

⁶⁸² Interview 8.

⁶⁸³ Commission Implementing Decision of 23.8.2022 on the financing of the multiannual action plan for the thematic programme on Global Challenges (People) for 2022-2024, C(2022) 6137 final; Commission Implementing Decision of 29.4.2025 on the financing of the multiannual action plan for the Global Challenges (People) thematic programme for 2025-2027, C(2025) 2581 final.



diversity considerations in its external policies and financial support schemes, as well as the hurdles it has encountered while doing so.

EU external trade policy has shown both its value and its limitations in relation to the audiovisual sector. The audiovisual exception that is steadily upheld in the Union's trade relations with third countries in areas pertaining to trade in services and investment is a *sine qua non* condition for safeguarding and promoting the Union's cultural diversity. This reflects a deliberate and strategic position on behalf of the EU which is meant to allow the development of full-fledged policies that support cultural diversity. These policies cover EU audiovisual support programmes: currently, the Creative Europe and its Media strand. These programmes are not only essential for European creativity and cultural expression; they also play a key role in bolstering the European cultural and audiovisual sectors and their ability to grow. They support competitiveness in the internal audiovisual market as well as the development of an outward ambition and capacity. This is evident in the main objectives of Creative Europe: the programme seeks to support both European cultural diversity and increase the competitiveness and the economic potential of the cultural and creative sectors.

In this context, Creative Europe has also sought to strengthen the internationalisation of the European audiovisual sector. It has done so in two ways: First, by allowing third countries to participate in the audiovisual cooperation actions that it supports, which serves to enhance the appeal and the presence of European works in the third countries concerned by strengthening ties, increasing engagement and fostering industry integration. Regarding the presence of European audiovisual works in these third markets in particular, this is also assisted by the fact that participation in the Media strand of Creative Europe is subject to alignment with the AVMSD, and that the latter establishes concrete ways to enhance the position of and promote European works in audiovisual linear and non-linear services through requirements for the promotion of European content. Second, Creative Europe has been able to develop a specific internationalisation dimension which can facilitate access to foreign markets. This is made possible through the incorporation of internationalisation-related *objectives* within the Media strand of the programme, such as enhancing the circulation, promotion and online and theatrical distribution of European audiovisual works within the Union *and internationally*, and supporting the engagement and development of audiences, in particular young audiences, across Europe *and beyond*.

The Media Strand of the current Creative Europe programme has provided direct support for the internationalisation of the European film sector. It has done so through financing international



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co-production funds and promotion activities for European works across different countries, such as participation in international industry events for film and the audiovisual, professional exchanges and networking. These are certainly vital elements to support and boost the access of (co-produced) European films in third markets. Yet, other actions of the programme which would be crucial to advancing the positioning of European audiovisual works on the global scene lack an explicit international outlook. For instance, sales and distribution activities could open up to the global market more directly in support of the extroversion of European content, and do so without compromising the emphasis on sales and distribution activities across the markets of the countries participating in Creative Europe. Audience development in third markets with a European orientation could receive more attention in the implementation of the programme through dedicated calls. This is also the case with policy dialogue with third countries. The programme features support for policy dialogue and the analysis and exchange of best practice activities, but such dialogue has not addressed internationalisation aspects sufficiently so far. In any case, the objectives of the programme, as they stand, can be used to support the more explicit targeting of available funds towards the international scene.

The analysis has also shown that there is untapped potential in terms of enhancing the consistency of Creative Europe with external action policies and funding sources. Audiovisual cooperation is an element that has been integrated into the EU's external relations and the agreements entered into with third countries testify to this. Agreements with developing and developed countries, candidate countries and neighbourhood countries do incorporate provisions addressing cooperation in the audiovisual field, directly or indirectly, through various aspects that are relevant to the internationalisation of the European film industry, although there are nuances per type of country. The EU developed an interest in audiovisual cooperation with third countries early on and has negotiated relevant provisions in the agreements concluded. Since the entry into force of the 2005 UNESCO Convention, it has strengthened such efforts and has experimented with new instruments for audiovisual cooperation. These have proved particularly comprehensive and multi-faceted in terms of their approach to audiovisual cooperation, but have not been able to garner the support required for implementation and consolidation. This does not mean that EU interest in audiovisual cooperation has faded, since audiovisual cooperation provisions are still being integrated into agreements with third countries. They are more generic and less detailed, however, either making broad calls to audiovisual cooperation or dealing with isolated elements of cooperation in the audiovisual domain.



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In any case, the analysis makes it clear that the EU's interest in audiovisual cooperation with third countries, as reflected in its international agreements, has not been acted upon. Our study underscores the lack of adequately-supported implementation structures, either because they were not established in the first place with a focus on the audiovisual, or because such structures did not prove to be particularly active. It also shows that implementation has also stumbled over the fact that no funding has been earmarked specifically to implement the agreements' provisions. Audiovisual cooperation provisions have been decoupled from the Union's cultural funding instruments as well as its external action funding schemes, especially Global Europe. This supports the Union's external relations with third countries, but audiovisual cooperation and cultural cooperation more broadly are not really a priority. Other issue areas tend to be prioritised. Geographic multi-annual programmes with partner countries and regions attest to the lack of relevant initiatives; and while the thematic programmes may present culture as one of the areas identified for action (under Global Challenges), no programme targeting the audiovisual has been launched to date.

Overall, our analysis shows that, although the existing policies and instruments could support the internationalisation of the European audiovisual sector, there is no comprehensive all-encompassing strategy to promote European film and audiovisual works globally. For one thing, the Union will not do away with the audiovisual exception. What seems to be the way forward is to make better use of the policy space the audiovisual exception allows to explicitly target the internationalisation of the European audiovisual sector, promoting its competitiveness while at the same time guaranteeing cultural diversity. This requires the devising of a comprehensive strategy that will bring together in a coherent framework both the different elements of the Union's audiovisual cooperation with third countries and funding tools. Creative Europe in particular should adopt a more outward-looking approach in practice, placing greater emphasis on the global positioning of European audiovisual works, without losing its focus on the internal audiovisual market. Proposing such a strategy should go hand in hand with institutionalisation in terms of establishing appropriate implementation and monitoring structures.



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ANNEXES

TABLE 1: Correspondence table for interviews

Identification code	Interviewee affiliation	Interview date
Interview 1	European Commission	15 January 2025
Interview 2	European Commission	11 April 2025
Interview 3	European Commission	5 February 2025
Interview 4	European Commission	9 January 2025
Interview 5	Film Promotion NGO	18 March 2025
Interview 6	European Commission	21 January 2025
Interview 7	Film Sales Industry	2 April 2025
Interview 8	European Commission	19 March 2025
Interview 9	European External Action Service	4 April 2025
Interview 10	European External Action Service	19 May 2025

TABLE 2: List of EU agreements with non-EU countries studied

Title	Identifier
<i>Developed countries</i>	
Council Decision (EU) 2022/1664 of 20 September 2022 on the conclusion on behalf of the Union of the Framework Agreement between the European Union and its Member States, of the one part, and Australia, of the other part; Framework Agreement between the European Union and its Member States, of the one part, and Australia, of the other part.	OJ L 255, 03/10/2022
Council Decision (EU) 2017/37 of 28 October 2016 on the signing on behalf of the European Union of the Comprehensive Economic and Trade Agreement (CETA) between Canada, of the one part, and the European Union and its Member States, of the other part; Comprehensive Economic and Trade Agreement (CETA) between Canada, of the one part, and the European Union and its Member States, of the other part.	OJ L 11, 14.1.2017



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Council Decision (EU) 2016/2118 of 28 October 2016 on the signing, on behalf of the Union, and provisional application of the Strategic Partnership Agreement between the European Union and its Member States, of the one part, and Canada, of the other part; Strategic Partnership Agreement between the European Union and its Member States, of the one part, and Canada, of the other part.	OJ L 329, 3.12.2016
EU-China Comprehensive Agreement on Investment	Agreement in principle
Council Decision (EU) 2024/1394 of 22 April 2024 on the conclusion, on behalf of the European Union, of the Strategic Partnership Agreement between the European Union and its Member States, of the one part, and Japan, of the other part; Strategic Partnership Agreement between the European Union and its Member States, of the one part, and Japan, of the other part	OJ L 1394, 21.5.2024; OJ L 216, 24.8.2018
Council Decision (EU) 2018/1907 of 20 December 2018 on the conclusion of the Agreement between the European Union and Japan for an Economic Partnership; Agreement between the European Union and Japan for an Economic Partnership.	OJ L 330, 27.12.2018
Council Decision (EU) 2015/2169 (EU) of 1 October 2015 on the conclusion of the Free Trade Agreement between the EU and the EU Member States, of the one part, and South Korea, of the other part. Free trade Agreement between the European Union and its Member States, of the one part, and the Republic of Korea, of the other part	OJ L 307, 25.11.2015; OJ L 127, 14.5.2011
Agreement on Digital Trade between the EU and the Republic of Korea	Agreement in principle
Council Decision (EU) 2019/1875 of 8 November 2019 on the conclusion of the Free Trade Agreement between the European Union and the Republic of Singapore; Free trade Agreement between the European Union and the Republic of Singapore	OJ L 294, 14.11.2019
Council Decision (EU) 2025/798 on the signing, on behalf of the Union, of the Agreement on Digital Trade between the European Union and the Republic of Singapore	OJ L 798, 25.4.2025
Council Decision (EU) 2018/1676 of 15 October 2018 on the signing, on behalf of the European Union, of the Investment Protection Agreement between the European Union and its Member States, of the one part, and the Republic of Singapore, of the other part; EU-Singapore Investment Protection Agreement	OJ L 279, 9.11.2018; Agreement in principle
Council Decision (EU) 2021/689 of 29 April 2021 on the conclusion, on behalf of the Union, of the Trade and Cooperation Agreement between the European Union and the European Atomic Energy Community, of the one part, and the United Kingdom of Great Britain and Northern Ireland, of the other part, and of the Agreement between the European Union and the United Kingdom	OJ L 149, 30.4.2021



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of Great Britain and Northern Ireland concerning security procedures for exchanging and protecting classified information; Trade and Cooperation Agreement between the European Union and the European Atomic Energy Community, of the one part, and the United Kingdom of Great Britain and Northern Ireland, of the other part.	
<i>Developing countries</i>	
Council Decision 2008/805/EC on the signature and provisional application of the Economic Partnership Agreement between the Cariforum states, of the one part, and the European Community and its Member States, of the other part; Economic Partnership Agreement between the Cariforum states, of the one part, and the European Community and its Member States, of the other part	OJ L 289, 30.10.2008
Council Decision (EU) 2020/2234 on the signing, on behalf of the European Union, of the Agreement establishing an Association between the European Union and its Member States, on the one hand, and Central America on the other, and the provisional application of Part IV thereof concerning trade matters; Agreement establishing an Association between the European Union and its Member States, on the one hand, and Central America on the other part	OJ L 346, 15.12.2012
Council Decision (EU) 2012/735 on the signing, on behalf of the Union, and provisional application of the Trade Agreement between the European Union and its Member States, of the one part, and Colombia and Peru, of the other part; Trade Agreement between the European Union and its Member States, of the one part, and Colombia and Peru, of the other part	OJ L 354, 21.12.2012
Agreement on cultural cooperation between the European Union and its Member States, of the one part, and Colombia and Peru, of the other part	ec.europa.eu
Council Decision 2009/156/EC of 21 November 2008 on the signature and provisional application of the stepping stone Economic Partnership Agreement between Côte d'Ivoire, of the one part, and the European Community and its Member States, of the other part; Stepping stone Economic Partnership Agreement between Côte d'Ivoire, of the one part, and the European Community and its Member States, of the other part – Protocol.	OJ L 59, 3.3.2009
Council Decision 2012/196/EC of 13 July 2009 on the signing and provisional application of the Interim Agreement establishing a framework for an Economic Partnership Agreement between the Eastern and Southern Africa States, on the one part, and the European Community and its Member States, on the other part; Interim Agreement establishing a framework for an Economic Partnership Agreement between the Eastern and Southern Africa States, on the one part, and the European Community and its Member States, on the other part	OJ L 111, 24.4.2012



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Council Decision (EU) 2016/1850 of 21 November 2008 on the signature and provisional application of the stepping stone Economic Partnership Agreement with Ghana; Stepping stone Economic Partnership Agreement between Ghana, of the one part, and the European Community and its Member States, of the other part.	OJ L 287, 21.10.2016
Council Decision 2009/729/EC of 13 July 2009 on the signature and provisional application of the Interim Partnership Agreement between the European Community, of the one part, and the Pacific States, of the other part; Interim Partnership Agreement between the European Community, of the one part, and the Pacific States, of the other part;	OJ L 272, 16.10.2009
Council Decision (EU) 2016/1623 of 1 June 2016 on the signing and provisional application of the Economic Partnership Agreement between the European Union and its Member States, of the one part, and the SADC EPA states, of the other part; Economic Partnership Agreement between the European Union and its Member States, of the one part, and the SADC EPA States, of the other part,	OJ L 250, 16.9.2016
Council Decision (EU) 2019/753 of 30 March 2020 on the conclusion of the Free Trade Agreement between the European Union and the Socialist Republic of Vietnam; Free Trade Agreement between the European Union and the Socialist Republic of Vietnam	OJ L 186, 12.6.2020
Council Decision (EU) 2012/279 of 14 May 2012 on the signing, on behalf of the Union, of the Framework Agreement on Comprehensive Partnership and Cooperation between the European Union and its Member States, of the one part, and the Socialist Republic of Vietnam, of the other part, OJ L 137, 26.5.2012, p. 1; Framework Agreement on Comprehensive Partnership and Cooperation between the European Union and its Member States, of the one part, and the Socialist Republic of Vietnam, of the other part	OJ L 329, 3.12.2016
<i>Neighbourhood countries</i>	
Council Decision (EU) 2018/104 of 20 November 2017 on the signing, on behalf of the Union, and provisional application of the Comprehensive and Enhanced Partnership Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and the Republic of Armenia, of the other part; Comprehensive and enhanced Partnership Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and the Republic of Armenia, of the other part	OJ L 23, 26.1.2018
Council Decision Council Decision 2005/690/EC of 18 July 2005 on the conclusion of the Euro-Mediterranean Agreement establishing an Association between the European Community and its Member	OJ L 265, 10.10.2005



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States, of the one part, and the People's Democratic Republic of Algeria, of the other part; Euro-Mediterranean Agreement establishing an Association between the European Community and its Member States, of the one part, and the People's Democratic Republic of Algeria, of the other part	
C99/614/EC, ECSC, Euratom: Council and Commission Decision of 31 May 1999 on the conclusion of the Partnership and Cooperation Agreement between the European Communities and their Member States, of the one part, and the Republic of Azerbaijan, of the other part; Partnership and Cooperation Agreement between the European Communities and their Member States, of the one part, and the Republic of Azerbaijan, of the other part	OJ L 246, 17.9.1999
Council Decision 2004/635/EC of 21 April 2004 concerning the conclusion of a Euro-Mediterranean Agreement establishing an Association between the European Communities and their Member States, of the one part, and the Arab Republic of Egypt, of the other part; Euro-Mediterranean Agreement establishing an Association between the European Communities and their Member States, of the one part, and the Arab Republic of Egypt, of the other part	OJ L 304, 30.9.2004
2000/384/EC, ECSC: Decision of the Council and the Commission of 19 April 2000 on the conclusion of a Euro-Mediterranean Agreement establishing an association between the European Communities and their Member States, of the one part and the State of Israel, of the other part; Euro-Mediterranean Agreement establishing an association between the European Communities and their Member States, of the one part, and the State of Israel, of the other part	OJ L 147, 21.6.2000
2002/357/EC, ECSC: Council and Commission Decision of 26 March 2002 on the conclusion of the Euro-Mediterranean Agreement establishing an Association between the European Communities and their Member States, of the one part, and the Hashemite Kingdom of Jordan, of the other part; Euro-Mediterranean Agreement establishing an Association between the European Communities and their Member States, of the one part, and the Hashemite Kingdom of Jordan, of the other part	OJ L 129, 15.5.2002
2006/356/EC: Council Decision of 14 February 2006 concerning the conclusion of the Euro-Mediterranean Agreement establishing an association between the European Community and its Member States of the one part, and the Republic of Lebanon, of the other part; Euro-Mediterranean Agreement establishing an Association between the European Community and its Member States, of the one part, and the Republic of Lebanon, of the other part	OJ L 143, 30.5.2006
2000/204/EC, ECSC: Council and Commission Decision of 24 January 2000 on the conclusion of the Euro-Mediterranean Agreement establishing an association between the European Communities and their Member States, of the one part, and the	OJ L 70, 18.3.2000



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Kingdom of Morocco, of the other part; Euro-Mediterranean Agreement establishing an association between the European Communities and their Member States, of the one part, and the Kingdom of Morocco, of the other part	
97/430/EC: Council Decision of 2 June 1997 concerning the conclusion of the Euro-Mediterranean Interim Association Agreement on trade and cooperation between the European Community, of the one part, and the Palestine Liberation Organization (PLO) for the benefit of the Palestinian Authority of the West Bank and the Gaza Strip, of the other part; Euro-Mediterranean Interim Association Agreement on trade and cooperation between the European Community, of the one part, and the PLO for the benefit of the Palestinian Authority of the West Bank and the Gaza Strip, of the other part	OJ L 187, 16.7.1997
98/238/EC, ECSC: Decision of the Council and the Commission of 26 January 1998 on the conclusion of a Euro-Mediterranean Agreement establishing an association between the European Communities and their Member States, of the one part, and the Republic of Tunisia, of the other part; Euro-Mediterranean Agreement establishing an association between the European Communities and their Member States, of the one part, and the Republic of Tunisia, of the other part	OJ EC L 97, 30.03.1998
<i>Enlargement countries</i>	
Council and Commission Decision 2009/332/EC, Euratom of 26 February 2009 concerning the conclusion of the Stabilisation and Association Agreement between the European Communities and their Member States, of the one part, and the Republic of Albania, of the other part; Stabilisation and Association Agreement between the European Communities and their Member States, of the one part, and the Republic of Albania, of the other part - Protocols – Declarations	OJ L 107, 28.4.2009
Council and Commission Decision (EU, Euratom) 2015/998 of 21 April 2015 on the conclusion of the Stabilisation and Association Agreement between the European Communities and their Member States, of the one part, and Bosnia and Herzegovina, of the other part; Stabilisation and Association Agreement between the European Communities and their Member States, of the one part, and Bosnia and Herzegovina, of the other part	OJ L 164, 30.6.2015
Council Decision 2014/494/EU of 16 June 2014 on the signing, on behalf of the European Union, and provisional application of the Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and Georgia, of the other part; Association Agreement between the European Union and the European Atomic Energy	OJ L 261, 30.8.2014



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Community and their Member States, of the one part, and Georgia, of the other part	
Council Decision (EU) 2016/342 of 12 February 2016 on the conclusion, on behalf of the Union, of the Stabilisation and Association Agreement between the European Union and the European Atomic Energy Community, of the one part, and Kosovo, of the other part; Stabilisation and Association Agreement between the European Union and the European Atomic Energy Community, of the one part, and Kosovo (this designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence), of the other part	OJ L 71, 16.3.2016
Council and Commission Decision 2004/239/EC, Euratom of 23 February 2004 concerning the conclusion of the Stabilisation and Association Agreement between the European Communities and their Member States, of the one part, and the former Yugoslav Republic of Macedonia, of the other part; Stabilisation and Association Agreement between the European Communities and their Member States, of the one part, and the former Yugoslav Republic of Macedonia, of the other part	OJ L 84, 20.3.2004
Council and Commission Decision 2010/224 (EU/Euratom) of 29 March 2010 on the conclusion of the Stabilisation and Association Agreement between the European Communities and their Member States, of the one part, and the Republic of Montenegro, of the other part; Stabilisation and Association Agreement between the European Communities and their Member States, of the one part, and the Republic of Montenegro, of the other part	OJ L 108, 29.4.2010
Council Decision (EU) 2016/839 of 23 May 2016 on the conclusion, on behalf of the European Union, of the Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and the Republic of Moldova, of the other part; Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and the Republic of Moldova, of the other part	OJ L 141, 28.5.2016
Council Decision 2014/492/EU of 16 June 2014 on the signing, on behalf of the European Union, and provisional application of the Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and the Republic of Moldova, of the other part; Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and the Republic of Moldova, of the other part	OJ L 260, 30.8.2014



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Council and Commission Decision 2013/490/EU, Euratom of 22 July 2013 on the conclusion of the Stabilisation and Association Agreement between the European Communities and their Member States, of the one part, and the Republic of Serbia, of the other part; Stabilisation and Association Agreement between the European Communities and their Member States of the one part, and the Republic of Serbia, of the other part	OJ L 278, 18.10.2013
Council Decision (EU) 2014/295 of 17 March 2014 on the signing, on behalf of the European Union, and provisional application of the Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and Ukraine, of the other part, as regards the Preamble, Article 1, and Titles I, II and VII thereof; Association Agreement between the European Union and its Member States, of the one part, and Ukraine, of the other part	OJ L 161, 29.5.2014
Council Decision (EU) 2017/1247 of 11 July 2017 on the conclusion, on behalf of the European Union, of the Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and Ukraine, of the other part, with the exception of the provisions relating to the treatment of third-country nationals legally employed as workers in the territory of the other party; Association Agreement between the European Union and its Member States, of the one part, and Ukraine, of the other part	OJ L 161, 29.5.2014
C Council and Commission Decision 98/149/EC, ECSC, Euratom of 26 January 1998 on the conclusion of the Partnership and Cooperation Agreement between the European Communities and their Member States, of the one part, and Ukraine, of the other part; Partnership and Cooperation Agreement between the European Communities and their Member States, and Ukraine	OJ L 49, 19.2.1998
64/732/EEC: Council Decision of 23 December 1963 on the conclusion of the Agreement establishing an Association between the European Economic Community and Turkey; Agreement establishing an Association between the European Economic Community and Türkiye	OJ 217, 29.12.1964; OJ L 361, 31.12.1977



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TABLE 3: List of EU funding instruments studied

Legislative Act	Identifier	Status
<i>European audiovisual and film funding instruments</i>		
Council Decision 90/685/EEC concerning the implementation of an action programme to promote the development of the European audiovisual industry (Media) (1991 to 1995)	OJ L 380, 1.12.1990	No longer in force
Council Decision 95/563/EC on the implementation of a programme encouraging the development and distribution of European audiovisual works (Media II - Development and distribution) (1996- 2000)	OJ L 321, 30.12.1995	No longer in force
Council Decision 2000/821/EC on the implementation of a programme to encourage the development, distribution and promotion of European audiovisual works (MEDIA Plus - Development, Distribution and Promotion) (2001-2005)	OJ L 336, 30.12.2000	No longer in force
Decision 1718/2006/EC of the European Parliament and of the Council concerning the implementation of a programme of support for the European audiovisual sector (MEDIA 2007)	OJ L 327, 24.11.2006	No longer in force
Decision 1041/2009/EC of the European Parliament and of the Council establishing an audiovisual cooperation programme with professionals from third countries (MEDIA Mundus)	OJ L 288, 4.11.2009	No longer in force
Regulation (EU) 1295/2013 of the European Parliament and of the Council establishing the Creative Europe Programme (2014 to 2020) and repealing Decisions No 1718/2006/EC, No 1855/2006/EC and No 1041/2009/EC	OJ L 347, 20.12.2013	No longer in force
Regulation (EU) 2021/818 of the European Parliament and of the Council establishing the Creative Europe Programme (2021 to 2027) and repealing Regulation (EU) No 1295/2013	OJ L 189, 28.5.2021	In force
<i>External action funding instruments</i>		
- <i>Funding instruments for international cooperation</i>		
Regulation 1905/2006 of the European Parliament and of the Council establishing a financing instrument for development cooperation	OJ L 378, 27.12.2006	No longer in force



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Regulation (EU) No 233/2014 of the European Parliament and of the Council establishing a financing instrument for development cooperation for the period 2014-2020	OJ L 77, 15.3.2014	No longer in force
Regulation (EU) 2021/947 of the European Parliament and of the Council establishing the Neighbourhood, Development and International Cooperation Instrument – Global Europe, amending and repealing Decision No 466/2014/EU of the European Parliament and of the Council and repealing Regulation (EU) 2017/1601 of the European Parliament and of the Council and Council Regulation (EC, Euratom) No 480/2009	OJ L 209, 14.6.2021	In force
<i>- Funding instruments for acceding countries, candidate countries and potential candidates</i>		
Council Regulation (EC) No 1085/2006 establishing an Instrument for Pre-Accession Assistance (IPA)	OJ L 210, 31.7.2006	No longer in force
and Regulation (EU) No 231/2014 of the European Parliament and of the Council establishing an Instrument for Pre-accession Assistance (IPA II)	OJ L 77, 15.3.2014	No longer in force
Regulation (EU) 2021/1529 of the European Parliament and of the Council establishing the Instrument for Pre-Accession assistance (IPA III)	OJ L 330, 20/09/2021	In force



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PART C – T3.5: GENDER EQUALITY AND WOMEN'S REPRESENTATION IN THE AUDIOVISUAL SECTOR UNDER THE EU'S GLOBAL EUROPE INSTRUMENT

EXECUTIVE SUMMARY

This chapter explores gender equality in the audiovisual sector under the EU's NDICI-Global Europe instrument. It highlights persistent inequalities for women across creative roles in the European film industry and examines the EU's commitment to mainstream gender in its international cultural cooperation. Despite increased political emphasis on gender equality (e.g., Gender Action Plans I-III), structural barriers remain significant.

The research also shows that these challenges transcend European borders and persist globally. Progress under initiatives like NDICI and Creative Europe is uneven; while gender mainstreaming and human rights promotion feature prominently, targeted measures for women's leadership and participation in the audiovisual sector remain insufficient. Existing funding instruments rarely support the cultural industries as a strategic avenue for women's empowerment. The chapter concludes that future policy and funding must more explicitly recognize the role of women in cultural industries as key drivers of gender equality and sustainable development.



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LIST OF ABBREVIATIONS AND ACRONYMS

AI	Artificial Intelligence
DCI	Development Cooperation Instrument
EFSD	European Fund for Sustainable Development
EFSD+	European Fund for Sustainable Development Plus
EIDHR	European Instrument for Democracy and Human Rights
EU	European Union
GAP I–III	Gender Action Plan I–III
IPA III	Instrument for Pre-Accession Assistance
MFF	Multiannual Financial Framework
NDICI	Neighbourhood, Development and International Cooperation Instrument
ODA	Official Development Assistance
SDGs	Sustainable Development Goals
UNESCO	United Nations Educational, Scientific and Cultural Organization



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INTRODUCTION

Despite ongoing progress in the European film industry, particularly in terms of technology and creative innovation, gender inequality persists, with women remaining underrepresented in key creative and technical roles. Recent data reveal enduring structural and economic barriers: female directors in Europe earn approximately 30% less than their male counterparts, and only one in four key creative positions are occupied by women (Willekens et al., 2019; Loist et al., 2024; Fontaine, 2024). These imbalances persist despite national variations, and they are particularly stark in leadership and technical roles such as directing, cinematography, and screenwriting. Within this context, the European Union has taken steps to integrate gender equality into its internal cultural policy frameworks. However, how these commitments translate into external action, especially in the context of the NDICI–Global Europe instrument, has received limited scholarly attention.

This section aims to fill that gap by examining how gender dimensions are addressed in the EU's external audiovisual cooperation under the NDICI–Global Europe (Neighbourhood, Development and International Cooperation Instrument). Specifically, the research focuses on the ways in which - and extent to which - the EU supports gender equality through audiovisual and film-related initiatives in its partner countries outside Europe. The objective is to analyse whether and how NDICI-funded programmes incorporate gender-sensitive strategies in the audiovisual sector, and to what extent these initiatives promote women's participation, leadership, and representation in audiovisual and media production.

The section is structured as follows: It begins by providing an overview of gender disparities within the European audiovisual and film industries, establishing the context from which the EU's external commitments emerge. It then moves on to investigate how the NDICI framework addresses gender in its cultural programming, with a specific focus on the audiovisual sector. Through examples of project supported and analysis of selected NDICI-funded projects in Africa, Latin America, and the Middle East, the chapter assesses both the scope and limitations of the EU's efforts in promoting gender equality abroad. It highlights the gaps, best practices, and potential areas for policy enhancement within the intersection of gender, film, and audiovisual sector.

This work applies a document-based qualitative methodology, to examine how gender equality is addressed within the context of film industry policies, specifically under the NDICI-Global Europe instrument and related EU frameworks. A total of 35 documents were reviewed, including EU



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policy and legislative texts (e.g., NDICI regulations, GAP III, Creative Europe, and gender equality strategies from 2010-2025); evaluation reports and implementation plans from European Commission directorates (e.g., DEVCO, EuropeAid); academic and institutional research on gender and film (e.g., Loist & Prommer, Fontaine 2024, USC Annenberg reports); industry-specific strategies, such as Eurimages' gender equality action plans and the European Audiovisual Observatory reports; NGO and civil society analyses (e.g., CONCORD Europe); cross-regional cases in African and Latin American cinema to compare EU outreach. The documents were selected based on their relevance to three criteria: gender in audiovisual production (inclusion, representation, and workforce data); European external action and cooperation instruments (especially NDICI); and creative and cultural policy frameworks as linked to development, diversity, and equity. The triangulation of the sources enabled a deeper understanding of the intersection between gender equity and EU development policy, particularly under the NDICI's unified structure for global cooperation.

1. EUROPEAN UNION GENDER PRIORITIES IN THE AUDIOVISUAL SECTOR

Data indicates that a director's career in Europe is both unstable and precarious. Directors remain among the lowest-paid audiovisual authors in Europe, with female directors earning a median annual income of only €12,500 after tax, compared to €18,000 for their male counterparts (Willekens, Siongers, Pissens & Lievens, 2019). The gender pay gap for directors in Europe, based on the provided data, is approximately 30.56%, with female directors earning less than their male counterparts.

This disparity can be attributed to several factors, including the organisation of film production, which requires long-term commitments to individual projects, preventing directors from working on multiple productions simultaneously. The European Audiovisual Observatory's latest report on female professionals in European film production (2015-2023) (Fontaine, 2024) provides a comprehensive analysis of gender representation across six key roles: directors, cinematographers, screenwriters, composers, producers, and editors. It highlights that women accounted for 26% of active film professionals in 2023, marking a 5% increase since 2015. Female producers led with 32%, while directors showed the largest growth at 27%. However, technical roles like cinematographers and composers lagged behind with only 14% and 12% representation, respectively. The report also explored disparities in genres and career trajectories, noting that



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documentaries have a higher proportion of female directors (31%) compared to live-action fiction films (23%). These data shows that women filmmakers across Europe remain significantly underrepresented in key creative positions, despite regional variations and occasional progress in specific countries. According to Loist et al. (2024), on average, only one in four key creative positions in the European film industry are occupied by women. This gender imbalance persists across all Eurimages member countries, where approximately 77% of these roles are filled by men. The highest proportions of women in key creative roles are observed in Sweden, Denmark, the Netherlands, and Austria, while Spain, Italy, the Czech Republic, and Portugal exhibit the lowest representation. According to this report, among the three key creative positions (*directing, writing and producing*), producing shows the highest level of female participation, primarily because it is often a collaborative role involving multiple individuals. Nevertheless, men dominate this sector as well. In the directing field, where roles are typically held by a single individual, the gender disparity is particularly stark. Following the data from the report, between 2010 and 2020, 81% of films were exclusively directed by men, while only 17% were directed solely by women and 2% by mixed-gender teams. This pattern is consistent across most countries, though there are notable exceptions. In Austria (26.5%), the Netherlands (26.1%), Sweden (24.3%), and Finland (23.7%), approximately one in four films during this period were directed by women. Conversely, the representation of women in directing plummets to about one in ten films in countries like Spain (10.7%), Portugal (9.8%), Greece (9.7%), and Italy (8.7%).

According to Loist et al. (2024), the underrepresentation of women extends to screenwriting, where women, whether working alone or in mixed-gender teams, are involved in only 31.6% of films across Eurimages countries between 2010 and 2020.⁶⁸⁴ Of these, 16% of films were exclusively written by women, while 15% involved mixed-gender writing teams. This trend is consistent across various regions, with men contributing to at least three in four screenplays in countries such as Norway (74.3%), Sweden (74.3%), Canada (79.1%), the UK (81.6%), and Spain (85.7%). Producing, although more collaborative in nature, reflects a similarly skewed distribution. Only 15% of films across the Eurimages countries are exclusively produced by women, while 60% are produced solely by men. In over four out of five films, men play a leading role in production. There are, however, pockets of higher female participation. For example, in Sweden and Denmark, one in three films are exclusively produced by women, and women are involved in 55% of all film productions. In sharp contrast, men are involved in producing at least nine in ten

⁶⁸⁴ Eurimages currently comprises 39 member states, including all EU member states except Malta.



films in Italy, the Netherlands, and Austria. The low proportion of female producers in the Netherlands and Austria is particularly striking, as these countries exhibit relatively higher percentages of female directors and writers (Loist et al., 2024).

When examining the role positions of women in the European film industry between 2014 and 2016, the data reveals persistent gender disparities across key creative and technical functions. During this period, women's participation in primary production roles averaged just 30%, with notable differences depending on the genre. Women comprised 21% of the workforce in animation, 53% in documentary projects, and 30% in fiction. Out of 7,261 individuals working on 506 co-production projects, only 2,187 were women, reflecting a significant underrepresentation across the industry (Council of Europe, n.d).

These figures highlight that while some areas show more balanced gender participation, others remain overwhelmingly male-dominated. Women are more likely to occupy roles traditionally perceived as feminine, such as costume design and editing, areas that are often undervalued compared to more technical or leadership positions. In contrast, their presence is significantly lower in technical domains, including sound, music, and image production, where male professionals continue to dominate. This gendered division of labour reflects broader societal assumptions about the skills and capabilities associated with women versus men, reinforcing barriers to entry and career advancement for women in more technical and creative leadership roles. Although the proportion of women in the five principal creative functions has increased since 2012, women still only accounted for 26% of all such roles in 2016 across film projects (Council of Europe, n.d).

2. EXTENDING GENDER PRIORITIES THROUGH EU EXTERNAL ACTION INSTRUMENTS

While the rise of global entertainment corporations and artificial intelligence (AI) presents new challenges, many of the structural issues facing the industry today are longstanding. In this way, the European commitment to gender equality in the audiovisual sector under Creative Europe aligns with broader development and cooperation efforts. In other words, gender equality is both a strategic goal and a practical funding criterion. The European Commission explicitly prioritises the inclusion of underrepresented groups, stating that the programme promotes gender equality and aims to close existing gender gaps, (European Commission, 2021:9). This commitment is



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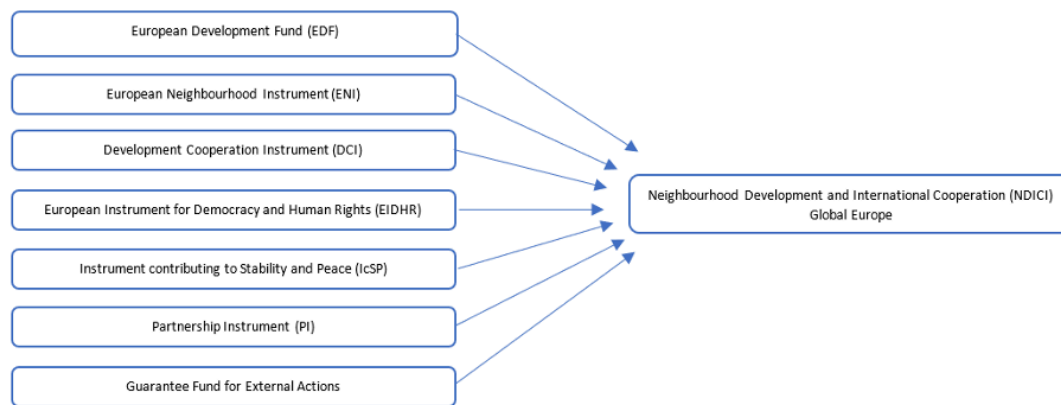
operationalised through sub-programmes like MEDIA, where funding decisions take into account not just artistic quality but also gender balance in staffing and content.

However, in line with its broader policy goals, the EU has developed two financial instruments to support international cooperation. The two main instruments for EU external action are the Neighbourhood, Development, and International Cooperation Instrument 2021-2027 programme (NDICI) also known as Global Europe and the Instrument for Pre-Accession Assistance (IPA III) (which is not subject of this work). NDICI focuses on broader development and international cooperation, as part of Multiannual Financial Framework (MFF) for 2021-2027⁶⁸⁵. The NDICI integrates multiple existing funding mechanisms for development cooperation, such as the European Development Fund and the Development Cooperation instrument, as well as other external action instruments, such as the Foreign Policy Instrument (FPI) and the European Instrument for Democracy and Human Rights (EIDHR).

The general objective of the Neighbourhood, Development and International Cooperation Instrument -Global Europe (NDICI) is to support and advance the European Union's values, principles, and fundamental interests on the global stage. It is designed to contribute to the overarching goals of the EU's external action, as defined in Article 3(5), Articles 8 and 21 of the Treaty on European Union (TEU), which emphasize the promotion of democracy, the rule of law, human rights, and sustainable development worldwide (European Parliament, 2021).

⁶⁸⁵ Regulation (EU) 2021/947 of the European Parliament and of the Council of 9 June 2021 establishing the Neighbourhood, Development and International Cooperation Instrument – Global Europe, amending and repealing Decision No 466/2014/EU of the European Parliament and of the Council and repealing Regulation (EU) 2017/1601 of the European Parliament and of the Council and Council Regulation (EC, Euratom) No 480/2009, PE/41/2021/INIT, OJ L 209, 14.6.2021, p. 1–78.





Gavas & Pleeck (2021)

The figure above illustrates how the NDICI (Neighbourhood, Development and International Cooperation Instrument) merges several previously separate EU external funding instruments into one unified framework. It shows that NDICI brings together funding streams that were once divided into geographic tools (like those for Africa, Asia, and the European Neighbourhood), thematic programmes (such as human rights or climate), and crisis response mechanisms. Now, under NDICI-Global Europe, these are streamlined into a single, flexible instrument. The NDICI-Global Europe itself, represents a strategic consolidation of the EU's external financing framework. As seen in the figure, it includes the Development Cooperation Instrument, the European Neighbourhood Instrument, the Instrument contributing to Stability and Peace, the European Instrument for Democracy and Human Rights, the Partnership Instrument, previously siloed guarantee facilities (EFSD, GFEA, ELM), and a unified blending facility now operating under the expanded European Fund for Sustainable Development Plus (EFSD+) integration not only simplifies funding mechanisms, combining grants, loans, guarantees, and blending under one roof, but also aligns the EU's financial tools toward common strategic objectives, thereby supporting more coherent responses to global development challenges and geopolitical shifts. A scheme that allows the EU to allocate resources more strategically, respond faster to global challenges, and align its external spending with overarching foreign policy goals.

The external dimension of the NDICI reflects a recognition that gender inequality in the film industry is not confined to Europe but is a global issue requiring coordinated international action. The EU's efforts to promote gender balance in its own audiovisual sector extend to the global stage, reinforcing the belief that cultural exchange and cooperation can foster more equitable and



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diverse storytelling. These instruments are not only designed to promote stability and development, but also to mainstream gender equality across all funded activities, including those within the cultural and audiovisual sectors. Regulation (EU) 2021/947, which establishes NDICI, specifically, Article 8 of the NDICI regulation, states that gender equality must be promoted in all sectors and programmes, including through the empowerment of women and girls and by addressing gender-based violence (European Union, 2021a).

While NDICI is not exclusively focused on the audiovisual sector, both instruments support cultural cooperation and creative industries within broader development frameworks. NDICI's thematic programmes, particularly under the "Global Challenges" strand, integrate gender equality into initiatives related to education, social inclusion, and cultural exchange (European Commission, 2021). This approach enables the promotion of gender-balanced storytelling and enhanced female participation in cultural production, especially in regions where structural gender inequalities in the media sector remain deeply entrenched. In many of the regions where instruments like NDICI and IPA III operate, a significant challenge remains: the lack of comprehensive data on gender in the audiovisual sector. This data gap itself reflects the systemic underrepresentation of women, particularly in key creative roles such as directing, screenwriting, and film criticism. Since this chapter focuses solely on one of the instruments, NDICI, the research and analysis relies exclusively on data related to this instrument.

2.1 Gender representation in EU-funded audiovisual sector outside the EU

2.1.1 Africa

Given that NDICI operates in regions such as Africa, Latin America, and Asia, it is essential to highlight the particular challenges faced by women in the audiovisual sector within these contexts. For instance, African women in the film industry face significant underrepresentation, particularly in directing and film criticism. Although African women began making films shortly after men in the 1950s, their contributions have often been overlooked. While there is a visible female presence in public discussions such as film festivals and forums, there are fewer written works analysing their contributions compared to male filmmakers (Bisschoff, 2009). The lack of research and attention to their work further exacerbates their marginalization. One major challenge is the structural and cultural barriers women face. According to Beti Ellerson (1997), African women filmmakers



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encounter three main obstacles: the general difficulties of film production and distribution in Africa, gender-based discrimination, and the challenge of balancing filmmaking with other societal and familial roles. These issues are compounded in patriarchal societies where women's authority may be undermined, especially when directing predominantly male crews. As a result, women are often limited to stereotypically female roles like production management, wardrobe, or editing, while technical and leadership roles such as directing and cinematography remain male-dominated (Bisschoff, 2009).

The challenges were reflected at the Pan-African Film and Television Festival of Ouagadougou (FESPACO), a major event for African cinema. At the 2005 edition, only three female directors participated in the official feature film competition. The situation worsened in 2007 and 2009, when no sub-Saharan female directors were represented in the feature film category, though there was some representation from North African women (Bisschoff, 2009). This lack of visibility and support limits the ability of African women to advance in the industry and make their voices heard.

Despite these challenges, some regions show signs of progress. The Nigerian film industry, known as Nollywood, has seen a significant increase in women's participation in key creative roles. More women are becoming directors, producers, and screenwriters, reshaping the industry and bringing fresh perspectives. Female producers in Nigeria play a critical role in managing the filmmaking process from concept to distribution, contributing to Nollywood's growth and global influence. Women screenwriters are also crafting diverse and compelling stories, challenging traditional narratives and enriching the cinematic landscape (Ofori, 2024).

While African women continue to face systemic barriers such as gender discrimination, limited funding, and cultural bias, their growing presence in Nollywood and other emerging sectors however signals positive change.

2.1.2 Latin America

Latin American women have also historically been underrepresented both in front of and behind the camera (Case et al, 2021). Research by Case et al. (2021) shows that Hispanic and Latina women were absent from 856 out of 1,300 popular films analyzed, highlighting significant visibility challenges.



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Several studies have highlighted that the film festival sector as well exhibits a gender bias similar to that observed in the global film industry (Smith, Choueiti, Clark, & Pieper, 2019; Loist & Prommer, 2019). Over the past four decades, large datasets have been compiled and analysed, consistently revealing "stark, longstanding, and, in many cases, worsening inequalities related to gender, race, ethnicity, class, age, and disability" within the global film industry (Verhoeven et al., 2020). The 2021 "Celluloid Ceiling" report by Lauzen, which has tracked the number of women employed behind the scenes in U.S. filmmaking for the past 23 years, indicates that women still account for only 23% of creative team members in the top 250 grossing films (Ehrichet al., 2022).

2.1.3 Asia

Asia is one of the most culturally and politically diverse regions globally, with a rich composition of customs and traditions shaping the understanding and practice of gender identities and relations. The European Union's development assistance in Asia began in 1976 but has grown significantly over the decades. Due to the region's diversity, the EU's engagement with Asia was historically fragmented and lacked a coherent strategic framework until the mid-1990s (Sobritchea 2006).

The EU Asia Regional Multiannual Indicative Programme (MIP) 2014-2020 framed gender equality and diversity as core principles underpinning its external action (European Commission, 2014). Gender was approached as a cross-cutting concern integrated across priority sectors such as regional integration, green growth, migration, and governance. The programme explicitly encouraged the use of sex-disaggregated data and gender-sensitive monitoring frameworks during project design and implementation. However, the uptake and application of these tools varied widely among partner countries, with inconsistent practical follow-through (European Commission, 2014: 5–7).

Importantly, the 2014-2020 MIP did not allocate dedicated funding to audiovisual or media-based gender projects at the regional level. This absence highlights a broader gap between policy rhetoric on gender mainstreaming and tangible investment in gender-responsive cultural sectors. While gender equality was mainstreamed rhetorically and in planning, the lack of targeted support for the creative industries, such as film and media, limited the potential for transformative impact through these influential channels.

Comparing this earlier programme with the Asia and Pacific MIP 2021-2027, there is a clear evolution in how gender issues are framed and prioritised. The latest MIP places stronger



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emphasis on mainstreaming gender equality across all thematic areas, including connectivity and digital transformation, environmental protection, and governance reforms. It promotes more systematic integration of gender-sensitive approaches and gender-disaggregated data, reflecting lessons learned from the previous cycle (European Commission 2021).

In 2021, as part of its ongoing cultural and gender-related engagement, the EU supported a short film competition alongside the tenth edition of the Nepal-EU Virtual Film Festival (held from 17 to 25 September). This event featured films that addressed issues related to gender, such as the impacts of gender discrimination, the benefits of promoting gender equality, the state of gender equality in Nepal, and the role of gender mainstreaming in advancing development (Delegation of the European Union to Nepal, 2021).

However, the situation for women in the film industry remains challenging. An analysis of the 1,100 most popular films released in the United States between 2007 and 2017 found only forty-three unique women directors, representing just 4.3 percent of all directors. Among these women, thirty-six were white, four were Black/African American, two were Asian, and one was Hispanic/Latina. Meanwhile, the Philippines demonstrates strong gender access but ranks low in terms of gender equality in film releases. This contrast needs more attention, especially since many Asian and South American countries score low on both national and film-related gender equality (Verhoeven, Coate, & Zemaityte, 2019).

2.1.4 Challenges in gender equality funding

In the context of the EU's financial framework for the Multiannual Financial Framework (MFF) 2021-2027, the allocation of funds under the NDICI is divided into specific thematic areas. The allocation framework specifies that 20% of ODA-eligible resources will be dedicated to supporting social inclusion and human development, with a clear focus on gender equality and women's empowerment. This allocation is significant because it ensures that a substantial portion of the EU's development cooperation budget is directed towards improving the well-being of marginalized groups, addressing inequalities, and promoting the empowerment of women globally.

However, the emphasis on human development as part of the broader 20% allocation includes various aspects, such as health, education, and social inclusion. While gender equality is a key component, it falls under the broader umbrella of human development, which can risk diluting the attention and funding directly targeted at gender-specific challenges. This broad allocation model



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has been critiqued for not sufficiently recognizing gender equality as an independent and prioritized area of intervention.

As highlighted by CONCORD and other organizations in their letter to EU Heads of State and Government, the inclusion of gender equality under the 20% target for human development might reduce the funding available for this critical area, rather than enhance it. Instead of ensuring dedicated resources for gender equality, the merging of gender equality into a broader human development category could potentially weaken the impact and focus of interventions aimed at addressing gender-based discrimination and advancing women's empowerment, especially in regions that face severe gender inequality. This approach could undermine EU commitments under the European Consensus for Development and the Gender Action Plan II, which emphasize the need for specific and sustained financial investments in gender equality (Concord 2018).

The letter states that; "not only does the Regulation fail to propose a sound approach to gender equality, if adopted it would represent a major step backwards. It makes a few cursory references to gender equality, limited to gender mainstreaming, and some short additional references to women's economic empowerment, women's rights and gender-based violence in the Annexes. Besides mainstreaming alone not being sufficient to ensure any meaningful impact, no indication is given on how it will be effectively implemented.

Instead of increasing funding for gender equality, the Regulation does the exact opposite: by including gender equality under the existing target for human development (20%), it clearly reduces funding for both areas and is in direct contradiction to commitments under the European Consensus for Development and the Gender Action Plan II."

2.2 The EU's financial commitment to gender equality through the NDICI-Global Europe in action

The NDICI -Global Europe (2021-2027), plays a crucial role in shaping the EU's external actions. It is structured around three main pillars. The geographical pillar supports country and regional programmes, targeting cooperation with specific regions and partner countries. The thematic pillar focuses on addressing global priorities, including human rights, democracy, civil society, peace and stability, conflict prevention, and broader global challenges. Complementing these is the rapid-response pillar, which is designed to address crises, strengthen resilience, and facilitate the



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coordination between humanitarian aid and development cooperation, while also responding to emerging EU foreign policy priorities.

Under this instrument, the EU has allocated €79.46 billion (in current prices) for cooperation with non-EU countries over the 2021-2027 period, excluding pre-accession beneficiaries and overseas countries and territories. This budget reflects a 12% increase compared to the 2014-2020 period, highlighting the growing strategic importance of Global Europe within the EU's external action agenda.

Geographic agreements cover nearly all global regions: EU neighbourhood (East/South), Sub-Saharan Africa, Asia & Pacific, Americas & Caribbean, plus Western Balkans and Turkey. Sectoral partnerships include climate energy deals (e.g., JETPs with Indonesia, Senegal, South Africa, Vietnam) via EFSD+/EIB. Country-level programming allows tailored cooperation, as demonstrated by Moldova's multiannual framework and Ukraine's resilience-focused facilities.

With the EU's Gender Equality Strategy and Gender Action Plan III (2021-2025), there are high expectations that the new policy framework is addressing global challenges, counteracting the backlash on women's rights, exacerbated by the COVID-19 pandemic and advancing SDG 5 (Achieve gender equality and empower all women and girls).

The EU's focus on gender equality in external relations has evolved through a series of structured and progressively ambitious action plans. The first significant step was the adoption of the Gender Action Plan I (GAP I) in 2010, officially titled "Gender Equality and Women's Empowerment in Development (2010-2015)." This plan aimed to reinforce the EU's leadership role in promoting gender equality and empowering women in development cooperation. A key objective of *GAP I* was to ensure adequate human and financial resources were dedicated to gender-related initiatives. By 2015, nearly 50% of the EU's Official Development Assistance (ODA) was contributing to gender equality and women's empowerment, signalling the plan's influence in integrating gender concerns into EU-funded development projects. Building on the foundation laid by GAP I, the Gender Action Plan II (GAP II) was adopted in November 2015 under the title "Gender Equality and Women's Empowerment: Transforming the Lives of Girls and Women through EU External Relations (2016-2020)." This plan expanded the EU's commitment by focusing on three thematic areas: (i) ensuring girls' and women's physical and psychological integrity, including actions against gender-based violence and harmful practices like female genital mutilation (FGM) and child marriage. (ii) promoting social and economic rights and empowering



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women and girls, with an emphasis on improving access to education, healthcare, and economic opportunities and (iii) strengthening girls' and women's voices and participation in political, social, and cultural life, ensuring they have a platform in decision-making processes.

GAP II placed a stronger emphasis on accountability and monitoring, introducing performance indicators to track the progress of gender-related initiatives. This approach not only amplified the visibility of gender issues but also held EU institutions and member states responsible for delivering on their commitments.

The transition from GAP I and II to GAP III (2021-2025) under the NDICI-Global Europe framework reflects an evolving and comprehensive strategy to promote gender equality worldwide. GAP III emphasizes intersectionality, recognizing how gender inequality intersects with other forms of discrimination, and it prioritises systemic change by embedding gender equality across all EU external policies. It sets out an ambitious agenda for gender equality and women's empowerment in the EU's external action, with the aim of safeguarding progress and accelerating progress towards the Sustainable Development Goals and other international commitments.

In this context and based on the implementation of GAP III, adopted in November 2023, different thematic areas of engagement covered by GAP III includes 6 areas of operation as gender-based violence, sexual and reproductive health and rights, economic and social empowerment, equal participation and leadership, women peace and security and green and digital transformation.

Gender equality is mainstreamed across all geographical and thematic programmes, with a focus on supporting and monitoring the implementation of GAP III (European Commission, 2021). As part of its commitment to horizontal priorities, NDICI-Global Europe places significant emphasis on gender equality. At least 85% of new actions under the instrument are expected to have gender equality as either a principal or a significant objective, with at least 5% specifically dedicated to women's and girls' rights and empowerment.

Although projects funded and supported over the years have consistently focused on women's empowerment and the fight against gender-based violence across nearly all regions where NDICI operates, there is a notable absence of initiatives that directly support the audiovisual sector. This gap suggests a lack of targeted investment in audiovisual production and by extension in representation as a tool for gender representation and cultural development. The most relevant project funded in the broader cultural domain, standing out is: "Empowering Women through Arts



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and Culture in Havana.” This initiative, implemented between 2021 and 2022 with a total budget of EUR 526,547, promotes gender equality through artistic and cultural engagement. Funded under the NDICI's pillar of Economic and Social Empowerment, it highlights the potential of cultural expression as a means of supporting women's rights. The project was implemented in the Americas and the Caribbean region by a consortium including the International Committee for the Development of Peoples (CISP), the Interchange and Referral Centre - Communitarian Initiative (CIERIC), the Latin American Social Sciences Institute (FLACSO), and the University of the Arts (ISA) in Havana.

This example illustrates that while NDICI's cultural programming incorporates gender-focused projects, there remains room for greater inclusion of the audiovisual sector as a strategic vehicle for both cultural diplomacy and gender empowerment. However, recent initiatives suggest a growing recognition of the sector's potential within NDICI's broader framework. For instance, a €3 million NDICI-funded call in Morocco supports heritage and cultural projects tied to media and cultural spaces, explicitly promoting audiovisual cooperation and cultural diversity. Similarly, in Somalia, a €1.6 million programme supports civil society initiatives centred on human rights, artistic expression, and cultural activities, including audiovisual projects, as tools for social cohesion and peacebuilding. These cases indicate a possible positive shift toward integrating the audiovisual sector into external cultural cooperation, though such efforts remain relatively limited and call for more targeted, sustained support across NDICI partner countries.



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3. CONCLUSIONS

Current programming under NDICI is characterized by broad thematic priorities, where gender equality is often mainstreamed across diverse projects rather than receiving dedicated, targeted measures for women in the audiovisual industry. The absence of robust baseline data and gender-disaggregated indicators in the audiovisual sector making it difficult to monitor progress or hold stakeholders accountable.

Although some notable achievements were made in human development, such as increased access to education across all continents and reductions in gender-based violence, there were significant gaps in supporting women's professional advancement, particularly in the film and creative industries.

Policies still underestimate the necessity for providing for film and gender support and the role symbolic meanings and their production plays when women are supported in leading positions. This lack of focus underscores the need for future EU instruments to adopt a more comprehensive approach to gender equality that extends beyond traditional areas such as health and education to include professional and creative empowerment for women.

However, the NDICI expands its scope under the “people” pillar, by addressing the interconnections between gender-based violence, health (including sexual and reproductive health and rights), and girls’ education. The NDCI maintains a strong focus on eliminating all forms of sexual and gender-based violence, including online violence, building on the EU-UN Spotlight Initiative and emphasizing knowledge sharing and donor engagement.

A key advancement in the NDCI is reflected in *specific objective 3: Gender Equality and Women’s and Girls’ Empowerment*, which supports global actions aligned with the EU Gender Action Plan (GAP III). This objective emphasises advancing the gender equality agenda in international forums, reinforcing global efforts to combat gender-based violence, and increasing targeted investments to promote women’s rights and empowerment.

A significant new development under the NDCI is the inclusion of *specific objective 7: “Culture”*, which recognises the cultural and creative industries as drivers of sustainable social and economic development. This objective supports cultural cooperation and the preservation of cultural heritage, aligning with Sustainable Development Goals (SDGs) 4.7 (Sustainable development and



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global citizenship) and 8.9 (Devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture). Notably, the NDCI aims to increase the share of cultural and creative industries in the GDP of partner countries and supports EU-led actions that promote culture, inclusive societies, human rights, and gender equality.

It is difficult to assess the trajectory of sustained and targeted EU funding for gender in the creative industries as a matter of external action and global priority in the EU's agenda. While the creative industries are increasingly acknowledged within the EU's external action and global agenda, both the integration of gender perspectives, particularly concerning the role and status of women in the audiovisual, media, and cultural sectors and the strategic importance of the creative industries overall remain subject to uneven and fluctuating commitment.

Future actions must sharpen their focus on measurable outcomes for women professionals. This entails more tailored funding schemes, rigorous data collection, and sustained dialogue with local women filmmakers and cultural organizations. Only then can the instrument effectively bridge the gap between policy aspirations and tangible improvements in gender equity, ensuring that EU-supported initiatives catalyse genuine, lasting change across the global film industry.



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