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ARTICLE



Promoting the European film industry in South Korea: united we stand, divided we fall?

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ABSTRACT

The European Union (EU) has long recognised the artistic, economic, and geopolitical value of its cultural industries, with the European Film Industry (EFI) playing a key role in its external cultural relations. Given the South Korean film industry's relevance in the internal and international market, it offers a valuable case for analysing the interface between European and non-European film industries, particularly in the context of the EU's external cultural relations. This paper examines how the EU promotes European films, and more broadly the EFI, in South Korea, focusing on market performance, policy instruments, and the consistency of initiatives between the European and the national levels. Based on market data, document analysis, semi-structured interviews with European and South Korean film professionals, and participant observation at the Asian Contents & Film Market, the article provides a comprehensive analysis of the EU's and member states' interests and strategies in promoting the EFI in South Korea.

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Introduction

The European Union (EU) has long recognised the artistic, economic, and geopolitical value of its cultural industries, with the European Film Industry (EFI) playing a central role in its external cultural relations (Bergfelder 2005). As both a creative and strategic sector, film serves as a vehicle not only for economic growth but also for cultural dialogue and the projection of European values abroad (Vlassis 2016). Through a combination of funding schemes, trade agreements, and promotional platforms, the EU seeks to strengthen the global circulation of European audiovisual works (Sarikakis 2007) and to deepen its ties with third-country markets (Fernandes, Loisen, and Donders 2021). This outward-facing dimension of EU cultural policy reflects broader ambitions to consolidate a European presence in the international audiovisual landscape (Ang, Isar, and Mar 2015).

In this article, EFI primarily refers to the film and audiovisual sectors operating within the EU framework. While the broader notion of 'European' may encompass non-EU countries and pan-European cooperation, the focus here is on the EU as a political and regulatory actor promoting its film industry abroad. The term EFI is thus used to highlight the European audiovisual works content, the institutional

dimensions (e.g. Creative Europe MEDIA, European Film Promotion network), and the various stakeholders engaging with these instruments, such as producers, distributors, and national film agencies from EU Member States. This approach aligns with recent scholarship that views the EFI not merely as a geographic or cultural category, but as a political-economic construct shaped by EU policy, market integration, regulation, and governance structures (Sarikakis et al. 2024; Vlassis 2022a). While national film industries within the EU maintain distinct identities and priorities, the notion of an EFI reflects a collective effort to project European audiovisual works in global markets, albeit one marked by fragmentation and asymmetries in power and capacity (Elsaesser, 2005).

Within this policy vision, South Korea occupies a particularly strategic position. Since the end of the Cold War and in the context of economic globalisation, the country has become one of the most dynamic and influential players in the global film market (Parc 2017; Parc and Messerlin 2018). With the world's highest cinema attendance per capita, a technologically advanced infrastructure, and a robust domestic production, South Korea offers a highly developed audiovisual ecosystem. It combines commercial vitality with growing international prestige, as seen in the increasing global visibility of South Korean films (Nam 2013; Ryoo 2008). For European stakeholders, this represents both an opportunity and a challenge: while the South Korean market is commercially attractive and culturally significant, it is also highly competitive and locally driven.

Given the EU's investment in promoting its film industry abroad and South Korea's relevance as a film market, it becomes relevant to understand how the EFI is positioned and promoted in this specific context. This article investigates the strategies through which the EU seeks to promote European films in South Korea and the ways in which various stakeholders, such as policy officials and film professionals from South Korea and Europe perceive the effectiveness, the impact of these strategies and the perspectives of the film cooperation between the EU and South Korea. This article investigates the European Union's efforts to promote the EFI in South Korea and explores the perceived barriers and opportunities identified by various stakeholders that may hinder or enable the effectiveness of these initiatives. By addressing these issues, the study contributes to broader debates in international cultural policy and media governance (Dâmaso 2025; Pauwels and Loisen 2016; Vlassis 2015, 2022a), offering a nuanced analysis of EU audiovisual strategies within a non-European and highly competitive media market.

The study draws on a combination of market data analysis, document analysis, 28 semi-structured interviews with South Korean and European film professionals, and participant observation at the 2024 Asian Contents & Film Market (, Busan, South Korea, 5–8 October). This multi-sited approach provides a grounded and empirically rich perspective on the practices, perceptions, and institutional mechanisms that shape the promotion of European cinema in South Korea.

The structure of the article is as follows. First, it introduces the South Korean audiovisual industry alongside the European Union's interests and strategies for promoting the EFI, applying a conceptual framework grounded in EU international cultural relations and supranational media governance, complemented by a mixed-methods approach. Second, it presents the analysis of empirical findings across four thematic sections. The article concludes with a discussion of the results and a set of policy recommendations.

Positioning the study: analytical framework and methodology

South Korea has become one of the most significant national film markets globally, marked by a strong domestic industry and consistent box office performance, achieving 58% of market share in 2024 (European Audiovisual Observatory 2025). With over 3,250 cinema theatres and the highest cinema attendance per capita worldwide (Korean Film Council 2023), the country has developed a technologically advanced and commercially robust film sector, ranking eighth globally in terms of gross box office revenues (European Audiovisual Observatory 2025). Initially dominated by foreign films, particularly those from Hollywood, the South Korean film market underwent a significant transformation in the late 1990s (Ryoo, 2008). This shift was the result of targeted governmental intervention, including policy reforms that liberalised film distribution and production, and a broader industrial strategy aimed at fostering domestic content (Parc 2017; Lee 2022). As Jin (2006) argues, these developments were embedded in the cultural politics of neoliberal globalisation, where state intervention did not primarily aim to secure cultural sovereignty, but was increasingly driven by (macro) economic imperatives. These measures enabled South Korean cinema to strengthen its position in the national market and gradually reclaim a substantial share of domestic box office revenues (Lee 2019).

Since the signing of a Free Trade Agreement in 2010, EU – South Korea relations have intensified, marked by a series of subsequent trade and political agreements. South Korea's designation as a strategic partner by the EU three years later reflects the growing importance of this bilateral relationship, particularly in economic terms (European External Action Service 2016). While much of the cooperation is driven by economic interests, scholars have also underscored the relevance of soft power in shaping these relations, pointing to shared values and the EU's emphasis on cultural relations as complementary dimensions of its external engagement (Yoon and Zamorano 2023).

On the cultural domain, although the EU and South Korea signed a Protocol on Cultural Cooperation as part of the 2010 European Union-Republic of Korea Free Trade Agreement, its implementation has been relatively modest (Gagné 2016; Loisen and De Ville 2011). As highlighted in existing literature, the protocol followed a top-down approach, formulated by the European Commission without significant input from European professional organisations within the audiovisual sector or sufficient consideration of the political will of individual EU member states (Richieri Hanania 2019; Vlassis 2016). In 2014, the Domestic Advisory Group, established by the European Commission to assess the implementation of the Protocol on Cultural Cooperation with South Korea, observed a notable 'lack of EU-Korea audiovisual co-productions under the conditions mentioned in the protocol' and emphasized that 'there is a need to promote the protocol at industry, state, and EU level if the entitlement for EU-Korean co-productions is to be properly exploited' (European Commission 2014, 2). This assessment underscores the gap between the protocol's formal provisions and its practical uptake within the industry. In 2025, France remains the only EU member state to have concluded a bilateral co-production agreement with South Korea in 2006. In addition, the Protocol provides for an entitlement to co-productions between producers from an EU Party and Korea. However, to date, no EU – Korea co-productions have taken place under the Protocol.

The EU's approach to external cultural relations highlights the role of culture, particularly audiovisual content, as a vector for promoting European values and

supporting economic interests (Fernandes 2021; Pauwels and Loisen 2016; Portolés 2019; Vlassis 2022a). The audiovisual sector is a strategic component of this agenda, positioned as a tool for both cultural relations and international competitiveness. The audiovisual sector, in particular, is central to the EU's vision of promoting cultural diversity abroad (Vlassis 2016), with policies aimed at increasing the global reach of European works. However, the EU's capacity to act as a coherent cultural actor is often complicated by the challenges of supranational governance (Burri 2023). Cultural policy, and particularly audiovisual policy, remains a shared competence between the EU and its Member States. While the EU may create frameworks and offer financial incentives, Member States retain primary authority over the design and implementation. It is illustrative that the *Centre national du cinéma* (France) was strongly reluctant towards the adoption of a Protocol on Cultural Cooperation with South Korea insofar as national authorities have historically guarded the audiovisual co-productions area (Vlassis 2016). In addition, the importance of economic interests in terms of the development of supranational audiovisual policies and, in particular, the power imbalance in this regard has been observed by several scholars in the field (Fernandes, Loisen, and Donders 2021; Loisen 2014; Michalis 2014). As a result, tensions between supranational objectives and the pursuit of national sovereignty in cultural/audiovisual affairs continue to limit the EU's external cultural strategies, leading to fragmented engagement in the international audiovisual market and challenges in consistently implementing common audiovisual policies abroad (Raats, Schooneknaep, and Pauwels 2018).

To examine these dynamics, this study draws primarily on the fields of EU international cultural relations and media governance. Although international cultural relations are generally conceptualised as a two-way process based on exchange, dialogue, and mutual understanding (Trobbiani & Pavón-Guinea, 2019, for further on this point, see Vlassis et al., 2026 in this issue), this paper focuses on how the EU seeks to promote the EFI in South Korea through policy instruments and industry practices. Therefore, it does not frame these exchanges as two-way cultural dialogue, but rather as structured cultural policy outreach to foreign markets. This emphasis reflects a media governance approach to external cultural policy, in which the EU positions itself as a global cultural actor aiming to improve the international visibility and competitiveness of its audiovisual sector (Erickson & Dewey, 2011; Vlassis, 2022b).

This analytical framework is particularly well-suited to capturing the multilevel nature of EU cultural policy, which is characterised less by regulatory enforcement and more by using soft instruments such as funding programmes, coordination platforms, and symbolic alignment. Within this context, the promotion of the EFI abroad can be understood as a form of soft governance, wherein a range of actors, including EU institutions, national agencies, and industry stakeholders, navigate overlapping responsibilities and strategic interests. This approach facilitates a critical examination of the EU's engagement with the South Korean film market, the policy tools mobilised to support the EFI, and the practical interaction between national and supranational levels. In doing so, the analysis also contributes to broader discussions on the perceived coherence and effectiveness of the EU's external audiovisual policy in a culturally and industrially distinct context. As such, the study adopts a multi-method approach based on policy documents, market data, semi-structured interviews, and participant observation.

Table 1. Overview of interview participants.

Role	South Korean	European
Producer	6	2
Distributor	5	1
Public institution	1	5
Festival programmer	3	3
Researcher	2	–

First, a document analysis was conducted to examine relevant EU and Member State initiatives aimed at promoting the EFI in South Korea. These include multilateral agreements, policy instruments, and the activities of institutions such as the European Film Promotion and national promotional bodies. Second, market data covering the period 2013–2022 were analysed to assess the presence of European films in the South Korean film market. These data helped contextualise the structural dynamics of the market and the visibility of the EFI. Third, 28 semi-structured expert interviews were conducted in English with professionals from the South Korean (17) and European (11) film industries, all of whom had direct and long-term engagement with the South Korean market. Participants represented a range of roles, including producers, distributors, and representatives of public institutions. The European interviewees were film professionals of various nationalities currently working in South Korea. Among them were festival programmers responsible for curating European films for South Korean audiences and South Korean films for European festivals. Other interviewees represented public institutions operating at both EU and national levels, including organisations such as European Film Promotion and training programmes designed to connect European and Asian film professionals. At the national level, interviewees included representatives from Member States, with a predominance of French actors, such as Unifrance and the French cultural embassy, reflecting France’s particularly active role in the South Korean film market. This composition of interviewees illustrates the multilevel nature of EU audiovisual policy, where supranational initiatives coexist and interact with nationally driven strategies. To encourage openness, all interviews were anonymised. [Table 1](#) provides an overview of the interviewees. Finally, participant observation was conducted at the 2024 Asian Contents & Film Market (ACFM), held in Busan from 5 to 8 October. Fieldnotes were taken during networking events, panel discussions, and interactions at the exhibition stands, with a particular focus on the EU and national-level promotional efforts.

Following data collection, a thematic analysis was conducted, drawing on the approach outlined by Herzog, Handke, and Hitters (2019). This method combined deductive coding through Nvivo, informed by the study’s research questions, with inductive analysis to capture emergent themes. The use of a multi-sited and triangulated methodology offers a robust framework for evaluating the EU strategies and their perceived effectiveness. It enables a grounded understanding of both institutional approaches and industry-level perspectives concerning the presence and influence of the EFI in South Korea.

Findings

This section presents the key findings of the study, organised into four thematic areas. The first focuses on the presence of European films, including those from the United Kingdom, in the South Korean market, based on an analysis of box office performance and film admissions data. Second, it reviews the main EU and Member State policy instruments used to support

the promotion of the EFI in South Korea. Third, it explores the perceptions of South Korean and European professionals regarding the effectiveness of these initiatives. Finally, it considers the current shifts in the South Korean audiovisual landscape and how these may influence future EU strategies in the region. Each subsection draws upon the full range of empirical materials collected, including market data, documents, interviews, and field observations.

Presence of European films in the South Korean market

To assess the visibility and circulation of EU films in South Korea, the study analysed publicly available data from the European Audiovisual Observatory covering the period from 2013 to 2022. These data include national market shares, admissions by country of origin, and the performance of the top 100 films in South Korea by annual audience numbers. The dataset provides a comprehensive overview of the structural composition of the South Korean film market and serves to contextualise broader policy and industry perspectives regarding the limited penetration of the EFI. The subsequent analysis identifies key trends in the positioning of EU films within a market largely dominated by domestic and United States productions.

An analysis of South Korean box office data from 2013 to 2022 reveals a market characterised by a stable dominance of domestic productions and Hollywood films. While the market share of South Korean films fluctuated during the COVID-19 pandemic, peaking at 68% in 2020 (European Audiovisual Observatory 2022) and falling to 30.1% in 2021 (European Audiovisual Observatory 2022) despite an increase in domestic releases, the overall trend underscores the strong position of national cinema [Figure 1].

A closer examination of the top 30 films by admissions during this period further illustrates the marginal role of European cinema in South Korea. The landscape is overwhelmingly shaped by South Korean and US titles, with European productions notably absent from the highest-performing segments [Figure 2]. Among the top 100 films released between 2013 and 2022, only 13 had any European production involvement, and all were co-productions involving the United States [Table 2]. These were predominantly high-budget, English-language commercial films, many associated with the UK and often framed within US distribution and marketing systems.

Films such as *Interstellar* (US/GB), *Bohemian Rhapsody* (US/GB), and *The Martian* (US/GB) exemplify this pattern. Even in cases where other EU countries were involved, such as *Snowpiercer* (KR/US/FR/CZ) or *Mission: Impossible – Fallout* (US/CN/FR/NO), the European contribution was typically embedded within broader global financing and production structures. Notably, no European arthouse film was featured in the top 100 during this period, suggesting a significant barrier to market access for non-mainstream EU titles. These limitations are partly attributable to factors such as distributors' limited investment capacity and audience preferences, which include both cultural and economic barriers, and will be further discussed in the following section.

The data indicate that the South Korean theatrical market remains largely impermeable to the majority of European films. Where European presence exists, it is primarily through Anglo-American co-productions with strong commercial appeal and global distribution backing. This suggests that the visibility of the EFI in South Korea is highly dependent on transatlantic partnerships and genre-driven marketing, rather than on independent or culturally specific European content.

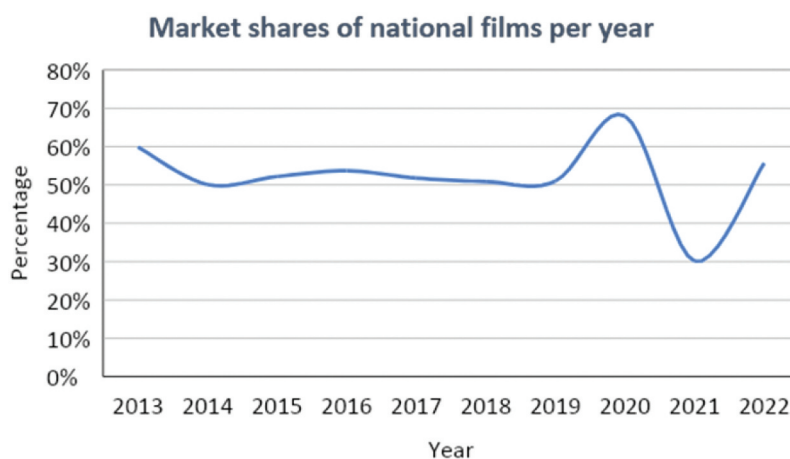


Figure 1. Market share of South Korean films from 2013 to 2023. Source: Authors based on European Audiovisual Observatory (2013–2023).

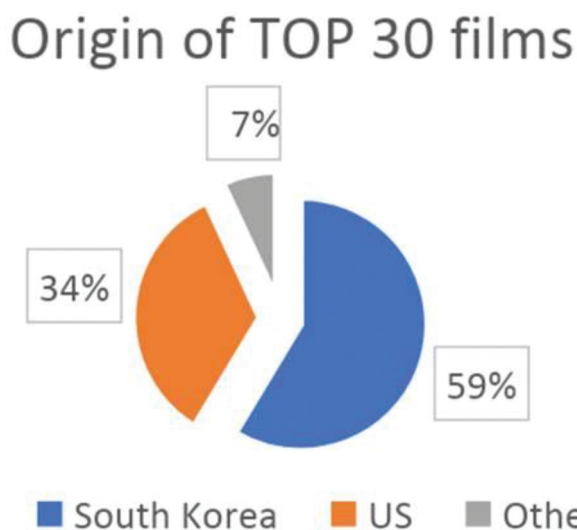


Figure 2. Origin of TOP 30 films from 2013 to 2022 – South Korea. Source: authors based on European Audiovisual Observatory (2013–2023).

EU policy instruments to promote the EFI in South Korea

The second dimension of this analysis focuses on the policy instruments employed by the EU and its Member States to promote the EFI in South Korea. The findings indicate a fragmented policy landscape, in which national-level initiatives often play a more prominent role than coordinated EU strategies.

At the EU level, the main multilateral mechanism in place is the EU – South Korea Cultural Cooperation Protocol. However, interviewees did not identify this framework as a central instrument for promoting film content, suggesting limited visibility or impact on the ground. More broadly, co-production agreements, commonly used by the EU to

Table 2. TOP EU movies from 2013 to 2022 – South Korea.

Original Title	Country of Origin	Director	Distributor	Admissions	Date
Interstellar	US/GB	Christopher Nolan	Warner Bros.	10105274,00	2014
Snowpiercer	KR/US/FR/CZ	Joon-ho Bong	CJ Entertainment	9341572,00	2013
Bohemian Rhapsody	US/GB	Bryan Singer	20th Century Fox	9224587,00	2018
Mission: Impossible - Fallout	US/CN/FR/NO	C. McQuarrie	Paramount	6584915,00	2018
Kingsman: The Secret Service	US/GB	Matthew Vaughn	20th Century Fox	6129681,00	2015
Kingsman: The Golden Circle	US/GB	Matthew Vaughn	20th Century Fox	4945484,00	2017
The Martian	US/GB	Ridley Scott	20th Century Fox	4880800,00	2015
The Lion King	US/GB	Jon Favreau	Walt Disney	4743264,00	2019
Gravity	US/GB	Alfonso Cuarón	Warner Bros.	4682418,00	2013
Fantastic Beasts and Where to ...	US/GB	David Yates	Warner Bros.	4662751,00	2016
Red 2	US/FR/CA	Dean Parisot	Lotte Entertainment	3166425,00	2013
Tenet	US/GB	Christopher Nolan	Warner Bros.	1992214,00	2020
Dolittle	US/CN/GB/JP	Stephen Gaghan	Universal	1607082,00	2020

Source: Authors based on European Audiovisual Observatory (2013–2023).

strengthen transnational ties in the audiovisual sector, are negotiated and implemented at the national level. In the case of South Korea, there is a notable absence of such agreements across EU Member States. France is a partial exception, having signed a co-production treaty with South Korea in 2006; however, the number of co-productions remains limited. According to Unifrance (n.d.), only ten feature films have been produced under this agreement. Interviewees indicated that the mechanism is largely underutilised due to structural asymmetries between the industries, limited financial incentives, and weak industry connectivity, including challenges related to professional networks, language, and cultural barriers, which together constrain the potential of co-production under this mechanism.

One of the most visible and positively evaluated EU-level initiatives is the role of European Film Promotion (EFP), a European network of 36 national film promotion public agencies, established in 1997. Several interviewees referred to EFP's consistent presence at the ACFM during the Busan International Film Festival. Acting as a central promotional platform, the EFP provides shared infrastructure for sales agents and distributors, enhancing their visibility and facilitating access to South Korean partners. The relevance of this initiative was repeatedly acknowledged in professional accounts:

In Busan, we are here together with Unifrance. We have a collective booth for European world sales companies who come to Busan to look for buyers for mostly European films, but some of them have also Asian contents, but they all have to be European companies and we just provide the booth so we can share resources and be more visible than each company would be on their own. (Interviewee 15, EU Public Institution)

It is worth mentioning that Unifrance is a professional association funded by the *Centre national du cinéma et de l'image animée* (In English: National Centre for Cinema and the Moving Image; CNC) and the French Ministry of Foreign Affairs and dedicated to the international promotion of French audiovisual works. It maintains three international offices in New York, Beijing, and Seoul, the latter of which covers South Korea, Japan and Southeast Asia (for further on Unifrance, see Vlassis

etal., 2026 in this issue). Observations from ACFM 2024 confirmed that the EFP shared a stand with Unifrance, while Italy was the only EU Member State to maintain an independent national stand. This divergence was interpreted by some professionals as symptomatic of a lack of unity in promoting the EFI abroad. The perceived benefits of collective representation contrasted with strategies focused on national branding, prompting calls for stronger coordination ‘We should defend ourselves by maybe bringing more European Union content and not so much Switzerland, French content’ (Interviewee 10, EU Public Institution). This statement highlights a perceived need for stronger joint efforts in promoting European audiovisual works in South Korea under a shared EU framework, rather than relying primarily on national strategies. In this context, the reference to ‘European Union content’ signals support for showcasing films produced by a range of EU Member States through a coordinated and cooperative approach.

Another policy tool highlighted by professionals was financial support for South Korean distributors willing to take on European titles. At present, this form of assistance is offered almost exclusively at the national level. France was frequently cited as a model in this regard, offering targeted funding that lowers the risks for local distributors. The absence of a similar scheme at the EU level was noted as a missed opportunity.

Equally, support for South Korean cinemas that programme European films, once considered effective, has reportedly been discontinued. Interviewees expressed interest in the revival or redesign of such incentives. In addition, the role of national embassies in facilitating professional exchange, particularly by supporting the participation of European talent at South Korean festivals, was regarded as highly effective (Interviewee 9, EU Festival Programmer; Interviewee 23, South Korean Festival Programmer). Several suggested that such initiatives could be scaled up at the EU level:

It could come as an incentive, like if ever a festival programmes more than 20% of its selection of European films, they could get financial support to bring either; I don't know artists or to support festival, for giving or doing an extra highlight of European films, which is for example, something we do for French films. We support festivals directly when they are programming, highlighting particularly French films, and it's really working well. (Interviewee 10, EU Public Institution)

Overall, the findings suggest that the promotion of the EFI in South Korea relies predominantly on national efforts, with France being the most active and visible Member State in this regard. While EU-level instruments such as the EFP are valued, the lack of broader coordination and shared policy frameworks is seen as a limitation, particularly in a market as competitive and structured as South Korea's.

Perceptions of the effectiveness of EFI promotion in South Korea

Professionals interviewed in both South Korea and Europe generally agreed that the visibility of the EFI in the South Korean market remains limited. This observation applied not only to the number of European films circulating but also to the depth of professional and institutional connections between the two regions. Across the interviews, three recurring challenges were emphasised: (i) audience expectations, (ii) distribution constraints, and (iii) limitations in the South Korean exhibition infrastructure.

A first recurring theme concerned audience consumption patterns in South Korea. Professionals described the domestic audience as highly responsive to fast-moving trends, social media campaigns, and word-of-mouth buzz, which tends to favour commercially-oriented, event-driven cinema. As one interviewee explained, 'our audience is quite fast, reactive to the trends and social media campaigns ... They just go for the cinema tickets on the opening day, even during the weekday' (Interviewee 26, South Korean Distributor). This tendency presents a challenge for European films, which are often perceived as positioned outside the mainstream. South Korean professionals frequently characterised European cinema as synonymous with arthouse content. While the definition of arthouse varied, ranging from 'intellectual' or 'slow' to 'beautiful' or 'innovative', the association was persistent regardless of genre or country of origin, as explained 'European films are considered as arthouse films, even a comedy film that in France it's commercial, in South Korea, it is considered as an arthouse film' (Interviewee 4, South Korean Public institution).

Distributors have acknowledged that European films recognised at major international festivals are generally viewed as less risky and, consequently, more appealing to buyers (Interviewee 6, South Korean Festival Programmer; Interviewee 5, EU Producer; Interviewee 18, South Korean Distributor). However, these films predominantly belong to the arthouse category. As such, they still face significant hurdles in connecting with broader South Korean audiences: 'That's the stereotype, especially in Korea, enigmatic themes, you don't know the meaning I'm supposed to love this, is a critically acclaimed film, but secretly, Koreans will be like, I don't know if I understood that, I don't know if I like it.' (Interviewee 7, South Korean Producer).

Despite the challenges, several professionals acknowledged that European films continue to attract a niche but dedicated audience in South Korea, particularly through the festival circuits. As one interviewee stated, 'I think it's still some meaningful audience, maybe not a broad audience, but a meaningful one. And I think that we need to work on that to keep it' (Interviewee 11, EU Public Institution). These audiences are often connected to specific institutions or generational cohorts, such as older cinephiles or academic communities. However, there is a shared perception that younger viewers are increasingly detached from contemporary European cinema, in part due to a lack of cultural familiarity and personal connection with the filmmakers or cast (Interviewee 18, South Korean Distributor; Interviewee 11, EU Public Institution) was viewed as a weakness. Several interviewees emphasised that the physical presence of European actors and directors at South Korean festivals or screenings could serve as a valuable means of strengthening ties and cultivating interest among new audiences.

A second major challenge concerns the distribution of European films in South Korea. For local distributors, acquiring and releasing European titles involves considerable financial risk. The market's strong commercial orientation, coupled with the absence of public support for non-Korean content, places the entire burden of investment on the distributor. One interviewee described this situation succinctly: 'You have to buy the film with a lot of money and then you have to distribute it with a lot of money. But then, if these are not Korean films, then you don't have any support from the government' (Interviewee 1, South Korean Producer). In this context, targeted support for distributors was consistently highlighted as a critical policy tool, with France frequently cited as a positive policy example.

At ACFM 2024, EU distributors were observed to be mainly promoting arthouse films (Interviewee 15, EU Public Institution), reinforcing the perception that European content remains positioned in a niche segment of the film market. One interviewee remarked that the industry environment has become progressively more challenging to navigate, as South Korean distributors are exhibiting diminished interest and offering lower acquisition prices for European titles (Interviewee 27, EU Distributor). Additionally, some distributors observed that films recognized at prominent international festivals, such as Festival de Cannes, Venice International Film Festival, and Berlin International Film Festival, are generally perceived as less risky and, as such, more attractive to buyers (Interviewee 6, South Korean Festival Programmer; Interviewee 5, EU Producer; Interviewee 18, South Korean Distributor). However, even such titles do not guarantee commercial success.

A third challenge relates to the exhibition landscape, which significantly constrains the circulation of European films in South Korea. The market is dominated by three vertically integrated conglomerates that control the majority of cinema screens and prioritise high-revenue, mainstream content (Yoo and Jeon 2022). This concentration limits opportunities for foreign and niche programming. One distributor described the typical audience for European cinema as 'usually women in their 30s to 50s ... regularly visiting art house cinemas' (Interviewee 26, South Korean Distributor). However, such venues, traditionally important for European titles, are diminishing, further narrowing access.

Within this restricted landscape, film festivals remain one of the few viable platforms for showcasing European films (see Lähdesmäki et al., in this issue). Festival audiences are generally more open to diverse and international film works, and several professionals emphasised the importance of fostering direct engagement between European filmmakers and local viewers. As one interviewee noted, 'One thing that always works in Korea is when there is the presence of filmmakers. The Korean audiences are always very curious' (Interviewee 9, EU Festival Programmer). Building on this point, a festival programmer suggested that establishing dedicated European film awards could enhance the visibility and motivation for European professionals, noting that some have expressed frustration at not being recognised within South Korean festivals (Interviewee 23, South Korean Film Programmer).

Some exhibitors and programmers reported small-scale efforts to bridge the gap between European cinema and South Korean audiences, often in partnership with universities, national cultural institutes, private companies, or embassies. While these initiatives were considered valuable, they were also described as sporadic and lacking coordinated support (Interviewee 17, South Korean Festival Programmer). An example of a sustained EU-level initiative is the EUNIC x EU Film Festival in Seoul, which celebrated its 10th anniversary in 2024. Organised by the European Union National Institutes for Culture (EUNIC), the festival showcases a diverse selection of European films, providing Korean audiences with access to works that might otherwise be unavailable.

Current context of the South Korean film industry

In addition to the structural barriers discussed above, interviewees frequently highlighted how recent shifts in the South Korean audiovisual landscape are reshaping both opportunities and constraints for the promotion of the EFL. Three contextual developments emerged as particularly significant: the lingering effects of the COVID-19 pandemic, the growing influence of Video-On-Demand (VOD) platforms, and changes in public funding and political priorities.

The pandemic had a profound impact on cinema attendance and film production in South Korea (Shin 2025), and several professionals noted that audience numbers and production levels have not yet returned to pre-pandemic levels. In this altered landscape, the commercial risk of acquiring and screening foreign content, particularly niche or non-mainstream titles, has increased. As one interviewee explained, 'Before COVID, an European independent film selected by a festival, like a French film from Cannes, could reach 40,000 to 50,000 admissions. Now, for a film to be considered OK, it's more like 10,000 to 15,000. So it's becoming something very niche' (Interviewee 10, EU Public Institution).

At the same time, VOD platforms have become more dominant and ubiquitous, accelerating shifts in audience behaviour and further fragmenting viewership (Mazur, Meimaridis, and Rios 2022). The ease of access to local and international content online has contributed to a decline in regular cinema-going, particularly among younger audiences. The impact of VOD in South Korea has introduced a series of structural tensions. While it has increased investment in South Korean content targeting a global audience, producers are drawn to platforms not only for direct funding but primarily for access to international markets. However, this relationship is asymmetrical, shaped by unequal power dynamics and structural dependencies between global platforms and national industries (Jin 2023). As Kim (2022) demonstrates, while Netflix's investment has provided new financial resources for content production, it has also resulted in exclusive control over the distribution of high-profile, tent-pole titles – typically large-budget, star-driven films or series intended to attract wide audiences and generate significant revenues. This undermines the competitiveness of domestic streaming platforms aiming to expand into the Asian market using Korean content, as they are excluded from distributing the most commercially valuable productions. The strategic decision by major South Korean broadcasters to license global rights to Netflix may offer short-term financial relief, but also weakens their long-term distribution power. Participants in Kim's study also voiced concerns about increasing dependence on foreign VODs, noting that this could lead to a production environment shaped primarily by the preferences of global platforms. These dynamics risk turning local producers into subcontractors of global capital, reinforcing existing asymmetries between domestic players and international giants. In response, the South Korean government has intensified efforts to support domestic platforms, recognising the strategic importance of maintaining their competitiveness.

A third significant development is the reduction of public support for the audiovisual sector, linked to recent political changes. Several interviewees described a climate in which both public and private investment in film production has declined, creating new pressures for local filmmakers and distributors. While this contraction makes the market more cautious and risk-averse, some professionals see it as a potential opening for new

collaborations. With domestic funding becoming less reliable, there is growing interest in exploring co-production models, including with European partners. As one interviewee observed, ‘I think people who watched movies for fun are not coming to the theatre anymore. So, commercial movies compared with arthouse movies, sometimes arthouse movies have more admissions . . . There is a really big gap’ (Interviewee 18, South Korean Distributor). This evolving environment, characterised by uncertainty and reconfiguration, presents both challenges and opportunities for the EFI. On the one hand, it intensifies existing barriers to market access. On the other hand, it represents a critical moment for strategic realignment, in which enhanced cooperation, particularly through co-production initiatives, could be more actively pursued.

Discussion and concluding remarks

This article set out to examine how the EU promotes the EFI in South Korea and to explore stakeholders’ perceptions of the strategies and barriers shaping this endeavour. The findings indicate that the EFI’s presence in the South Korean market remains notably limited. Despite the EU’s stated commitment to enhancing the international circulation of its audiovisual content, European films continue to be largely absent from mainstream distribution channels in South Korea. The study identified three interrelated barriers that contribute to this limited visibility: (1) a highly concentrated exhibition sector dominated by vertically integrated conglomerates with a strong focus on commercial cinema; (2) limited awareness and exposure to European films among South Korean audiences; and (3) a general lack of institutionalised co-production and cooperative frameworks between South Korea and the EFI.

A core finding of this study is the structural tension between supranational and national efforts to promote the EFI in South Korea. This lack of coordination reflects a broader fragmentation within European audiovisual policy, which has been identified as a persistent challenge in the EFI. The findings of this study confirm and empirically illustrate the difficulties highlighted in the literature, particularly in balancing national and supranational interests (Burri 2023), as well as in developing a coherent framework capable of ensuring the consistency and effectiveness of the industry’s international outreach (Raats, Schooneknaep, and Pauwels 2018). When interpreted through the lens of international cultural relations and media governance, these results suggest that the EU’s external audiovisual action operates less as a unified cultural diplomacy strategy than as a multi-level governance process, in which cooperative instruments at the EU level coexist with, but remain weakly connected to, national promotional logics (on this point, see also Vlassis et al., 2026 in this issue). While the EU has put in place certain multilateral instruments, such as the EU – South Korea Cultural Cooperation Protocol, the findings reinforce previous studies pointing to the lack of connection between the Protocol’s architecture and national stakeholders priorities (Loisen and De Ville 2011; Vlassis 2016). In practice, the promotion of European cinema in South Korea relies heavily on national-level initiatives (Pellino 2023; Yoon and Zamorano 2023). France, in particular, emerged from the interviews as the most active and visible EU Member State, offering support for local distributors, facilitating festival participation, and maintaining a steady institutional presence. Italy also participated independently at the ACFM, further illustrating the strong asymmetries of the EFI in power and capacity, as well as the fragmented nature of EFI

promotion in the region. The findings also point to a lack of coordinated audience development strategies capable of responding to the fast-changing media consumption patterns in South Korea. European films, often perceived as arthouse or niche, struggle to resonate with a commercially driven audience that responds strongly to trends, recognisable talent, and social media visibility. While some efforts to bridge this gap do exist, including festival participation and isolated partnerships with local institutions, these are inconsistent and lack sustained EU-level backing. Moreover, the withdrawal of earlier support schemes for exhibition and programming has further weakened the EFI's capacity to build long-term relationships with South Korean audiences.

At the same time, the current context in South Korea may offer new avenues for engagement. The combined impact of the COVID-19 pandemic, declining levels of public investment, and the rising influence of VOD platforms has contributed to a more cautious and risk-averse market environment. Within this climate, some South Korean industry professionals have expressed a growing openness to co-productions with European partners, viewing such collaborations as a means to diversify funding sources and expand audience reach. This shift could represent a strategic entry point for EU policy, particularly if accompanied by concrete incentives and well-structured support mechanisms. Consequently, future research could investigate the underlying causes of the limited co-production activity between the EU and South Korea, as well as identify potential pathways for deepening collaboration between the respective film industries.

If the EU aims to enhance the promotion of the EFI in South Korea, then future efforts might benefit from a more coordinated and context-sensitive approach. Strengthening alignment between EU-level and national-level initiatives could help present a more unified and consistent European presence at international markets and festivals. Central to these efforts should be a renewed focus on facilitating the distribution of European films in South Korea. Several interviewees identified the lack of institutional support for distributors as a major barrier to the circulation of EU content. Addressing this gap, whether through targeted funding schemes or risk-sharing mechanisms, could substantially reduce the entry barriers for local partners. Simultaneously, enhancing access to European films across diverse platforms and exhibition windows is essential, given their current limited availability in the South Korean market. Without improved accessibility, efforts to cultivate audience interest and engagement are likely to remain constrained, making audience development an enduring challenge. Equally important is the need to foster stronger connections between professionals in both regions through support networking, co-production, and cultural exchange. Overall, the research suggests that increasing the visibility and impact of the EFI in South Korea will require a shift from fragmented national approaches to a more coherent, sustained, and collaborative European strategy that carefully recognises the specificities of the South Korean market and seeks to build long-term cultural and industrial partnerships.

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