



REBOOT

The European Union as a Global Film Enabler

Rethinking Power, Competitiveness and Identity

Edited by

Antonios Vlassis · Mafalda Dâmaso

Katharine Sarikakis · Heritiana Ranaivoson

Marina Rossato Fernandes

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REBOOT

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ABBREVIATIONS

ACFM	Asian Contents & Film Market
ACM	Aide aux Cinémas du Monde
AFFF	Africa Film Financing Forum
AI	Artificial Intelligence
AVMSD	Audiovisual Media Services Directive
BAFICI	Buenos Aires International Independent Film Festival
BIFAN	Bucheon International Fantastic Film Festival
BIFF	Busan International Film Festival
CCEBA	Centro Cultural of Spain in Buenos Aires city
CNC	Centre national du cinéma et de l'image animée
CRTC	Canadian Radio-television and Telecommunications Commission
DSA	Digital Services Act
DSM	Digital Single Market
DTIC	Department of Trade, Industry and Competition
EC	European Commission
EEC	European Economic Community
EFI	European Film Industry
EFP	European Film Promotion
EIDHR	European Instrument for Democracy and Human Rights
EOF	French Original Expression
EU	European Union
EUFA	European University Film Award
FICG	Guadalajara International Film Festival
FICM	Morelia International Film Festival
FPI	Foreign Policy Instrument
HAVC	Croatian Audiovisual Centre

ICA	Institute of Cinema and Audiovisual
ICAA	National Institute of Cinema and Audiovisual Arts
ICEC	Institut Català de les Empreses Culturals
ICR	International Cultural Relations
IDC	Industrial Development Corporation
IFFR	International Film Festival Rotterdam
INCAA	Instituto Nacional de Cine y Artes Audiovisuales
IP	Intellectual Property
JIFF	Jeonju International Film Festival
MFF	Multiannual Financial Framework
MiBACT	Ministero dei Beni e delle Attività Culturali e del Turismo
MPAA	Motion Picture Association of America
NATO	National Association of Theater Owners
NDICI	Neighbourhood, Development, and International Cooperation Instrument
PSM	Public Service Media
SASFED	South African Screen Federation
SSA	Sub Saharan African (SSA) countries
SVOD	Subscription Video On Demand
TEU	Treaty on European Union
TVOD	Transactional Video On Demand
TVWFD	Television Without Frontiers Directive
UN	United Nations
US	United States of America
VLOPs	Very Large Online Platforms
VOD	Video-on-Demand
WTO	World Trade Organization
YAA	Young Audience Award

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CHAPTER 1

The European Union as a Global Film Enabler

*Antonios Vlassis, Mafalda Dâmaso, Katharine Sarikakis,
Heritiana Ranaivoson, and Marina Rossato Fernandes*

RESEARCH CONTEXT

In October 2025, the European Parliament expressed strong support for the European Union (EU)’s Audiovisual Media Services Directive (AVMSD), cautioning against what it calls external pressure from the United States to dilute Europe’s audiovisual media regulations (Dâmaso & Goffredo, [forthcoming](#); Vlassis et al., [2026](#)). Facing the “America first” strategy from the Trump administration, a resolution of the European Parliament reaffirmed that the AVMSD applies uniformly to all media providers operating within the EU—including

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US-based streaming platforms—without discrimination based on origin. Indeed, the global politics and economy of film is a strategic and relevant site to analyse the international cultural influence of the European Union (EU) (Vlassis, 2021) as a regulatory (Bradford, 2020; Hadjiyianni, 2021), industrial (McNamara, 2023) and cultural (Dâmaso, 2025) power. In Europe, going to the cinema remains one of the most popular cultural activities. In 2023, while the sector still recuperated from public policies pertaining to the COVID-19 global emergency, box-office numbers were close to one billion (Hancock, 2024). The sector's economic contribution is highlighted by the 100,000 people (Hancock, 2024) employed in France, Germany, Italy, Spain and the United Kingdom—and that is not to mention its well-known cultural relevance and social value (BFI, 2023). The strategic importance of the sector is recognised by policies internal to the EU (Valais, 2024), including a resolution that states that

films are goods that are both cultural and economic and contribute greatly to the European economy in terms of growth and employment whilst helping shape European identities by reflecting cultural and linguistic diversity, [...] facilitating cultural exchange and mutual understanding among citizens, as well as contributing to the formation and development of critical thinking (European Parliament, 2015).

However, film remains an asset with untapped potential in the EU's global action (Psychogiopoulou et al., 2024). This is evident in several trends and facts.

First, film is a significant and growing market: global viewer numbers are expected to reach 1.9bn by 2029 and the sector's revenue is projected to reach US\$86.10bn this year (Statistica Market Insights, 2025). Global industries have reached levels of extraordinary volume in production and market reach, making the case of a “contraflow” of cultural meaning making and expression and forms of representation beyond Hollywood.

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Bollywood, as the film sector in India is known, dominates the region (Javaid et al., 2025; Jha, 2025), but the sum of South Asian film industries is predicted to surpass US\$6.39 billion by 2029. Nollywood has been a driving developing force in the Nigerian labour market, with an annual growth of 10% and the creation of 200,000 jobs in the past decade (Otuonye & Oshyonebo, 2025). While the global success of Hollywood films is widely known, it is important to note that global film industries are not negligible. These international audiences and markets prove the need for more diverse content and styles and that demand is equally extensive, raising further the question about the possible place of European films in this context. Research shows that European films circulate in a wide range of markets and that the cultural diversity that they embody and support is evaluated positively by audiences (namely, by young people and children, who find European cinema “more artistic, more predictable, more patriotic, with better scripts and with fewer prejudices than cinema from the other regions” (Soto-Sanfiel et al., 2018: 18) and by international film professionals (Dâmaso et al., 2025; Durand-Vialle, 2024).

Second, these figures are accompanied by an evolution in the global audiovisual economy: the increasing market dominance of transnational US-based online platforms, which represents an unprecedented change in the production, distribution, broadcasting and consumption of audiovisual content (Nieborg & Poell, 2018; Vlassis, 2023c). It is not simply that US-based video-on-demand (VOD) services, such as Netflix, Amazon Prime Video, Disney+, Apple TV+ or HBO Max, have a major impact on the balance of power in the global audiovisual economy (Lobato, 2018); rather, the sector also witnesses a trend towards platformisation, that is, “the rise of the platform as [the] dominant infrastructural and/or economic model in the industry” (Evens & Donders, 2018: 4). In this context, the EU has developed a range of policy interventions to guarantee and enhance cultural diversity in VODs and, thus, in the global audiovisual market (Vlassis, 2023a). While these policies are originally focused on the circulation and availability of European film, they have the potential to impact positively on the global circulation of film from other markets by promoting cultural diversity. The EU could play a proactive role in this context, encouraging discussions among diverse stakeholders and fostering regulatory debates in other parts of the world, a potential yet not fully explored (Fernandes, 2025; Vlassis, 2023b).

Third, the ongoing transformation of the global audiovisual economy brings with it a shift in transnational audiovisual governance and politics. The first Trump presidency and the supply chain limitations faced in the EU during COVID-19 led policymakers to recognise the Union's strategic dependencies. Von der Leyen's focus on competitiveness—reflected in Mario Draghi's report on the Future of European Competitiveness (2024)—calls for a more united and effective single market and, simultaneously, for a geopolitical repositioning of the Union. At the same time, the recent disengagement of the US government from UNESCO, combined with the reinforced use of culture and media as hybrid warfare tools to weaken public support for plural, democratic political regimes (Dâmaso, forthcoming), heightens the importance of sustained policies to support cultural diversity at scale. Considering the importance of democratic cultures and principles in the EU's project and its global actorness, the film industry could be one of the sectors supporting global soft public diplomacy in the interests of pluralistic and inclusive societies. This would mean that besides aiming to reach new audiences and markets, the EU would have the role to reinforce the global governance of film in ways that respond to the needs of European and non-European industry professionals, address market imbalances and guarantee visibility to a diversity of voices and perspectives.

As such, the film industry raises major issues for the global cultural actorness of the European Union:

- (i) economic issues because the film industry is a key sector in terms of growth, competitiveness and employment for national and regional economies. According to the UNESCO Institute for Statistics, audiovisual services are becoming the most important cultural service in terms of trade exchanges (Deloumeaux, 2017);
- (ii) political issues, given that film expressions—seen as vehicles of shared ideas, values and collective representations—are resources of the power of states and of their capacity to shape their international environment. In this respect, film is the sector in relation to which most of the export and import measures are put in place (Deloumeaux, 2017);
- (iii) finally, cultural and identity issues because audiovisual film expressions have a distinct cultural value. Film expressions are components of national, regional, local or community identities, and several actors are increasingly worried about power implications.

RESEARCH PURPOSE

In this technological and geopolitical context, the EU will be expected to clarify what characterises its actorness in the world. As has been argued elsewhere, the EU has gradually emerged as an enabler of cultural diversity—a position that differs from neocolonialism or the paternalist undertones of soft power (Dâmaso, 2025). The multidimensional—cultural, economic and social—value of film, combined with its ability to circulate more easily than some other cultural forms, positions it as a relevant domain to rethink at the same time the EU's foreign cultural diplomacy and action, its market profile and position vis-à-vis other film industries, and how the EU relates to global audiences, particularly young ones. In other words, understanding the potential of the EU as an international and powerful film actor in this context requires reexamining the EU's global power, competitiveness and identity.

The film industry across the European Union—and more broadly across Europe—is not a single and homogenous entity, but rather a network of national and regional sectors, supported by public funding, private partnerships and transnational cooperation mechanisms, with the assistance by the EU and the intergovernmental organisation Council of Europe (Albornoz & Garcia Leiva, 2019; Nistoreanu et al., 2022). The European Film Industry (EFI) emerged as a political and economic project, shaped by the broader objectives of the European integration process. Until the early 1980s, cultural, technical and political issues related to the production, distribution and consumption of film and audiovisual goods and services had been mostly absent within European Community discourses, even though several voices from the *Centre national du cinéma* (France), from organisations of culture professionals as well as from academics started calling for the establishment of European public measures for the film industry (Depetris, 2008: 126–168). It can be said that since the 1980s, the EU has started playing an increasingly important role in the sphere of the film and audiovisual industry. As Iosifidis (2011, 143) pointed out, there are notably three key reasons: firstly, the globalisation of communication systems contesting the idea of mainly national media; secondly, the EU intervention in the field of audiovisual media and communications was deemed necessary in the process of the Europeanization of national markets; thirdly, the increased EU competence over the communications industry was equally significant.

In the late 1980s, EU Member States reached a consensus that their interests in the audiovisual sector, long challenged by the dominance of US-based conglomerates, would be better served through collective action at the European/supranational level (Depetris, 2008; Vlassis, 2015). The creation of an internal audiovisual market aimed to eliminate intra-European barriers, enhance the circulation of regional content and strengthen local industries to compete more effectively on the global stage. This vision aimed not only to strengthen regional players and eliminate internal market barriers, but also to counterbalance the dominance of Hollywood and assert and consolidate a distinct European identity through film and audiovisual expressions. While scholars have emphasised the importance of economic drivers, such as market integration, the free circulation of audiovisual goods and services, and enhanced competitiveness (Donders & Pauwels, 2008; Garrett, 1995; Harcourt, 2007), the protection and promotion of cultural diversity have remained central principles of the EU audiovisual policy and of its external cultural action. These dual objectives are reflected in a range of initiatives, including the MEDIA Programme, the EU's leading role in advocating for the 2005 UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions, plus the adoption of the Audiovisual Media Services Directive including local content quotas and investment obligations towards VOD platforms (Albornoz & Garcia Leiva, 2019; Pauwels & Loisen, 2016; Vlassis, 2016). From its inception, the EFI has been defined by this cultural-economic nexus (Richieri Hanania, 2019; Vlassis, 2015), with a long-standing recognition that the circulation of European films and the promotion of cultural diversity require targeted policy mechanisms and sustained public support. Moreover, even though film hasn't yet been incorporated explicitly and in a systematic manner in the EU's International Cultural Relations (Dâmaso, forthcoming), the EU's internal film policy and model has had a normative influence beyond the EU, inspiring similar frameworks for audiovisual policy in other world regions, such as Latin America (Fernandes, 2023a, 2023b, 2025).

Based on these considerations, it becomes evident that the definition of the European Film Industry as an object of analysis is not firmly fixed; rather, it is subject to political negotiation (Vlassis, 2022). Although the film industry encompasses a broad range of sectors—including production, distribution, cinema exhibition, film festivals, streaming etc.—the definition of what constitutes “European” within the European Film Industry remains dynamic, shaped by shifting political and historical

contexts. The European Film Industry operates both as a transnational entity and as the sum of multiple national film industries. This dual nature underscores not only extensive cross-border cooperation, but also the diversity between major film-producing countries—such as France, Spain, Italy and Germany—and the many smaller national film industries across the continent. At the institutional level, this complexity is reflected in the coexistence of two producers' organisations at the European level: the European Producers Club represents the interests of film producers across Europe, while EURO CINEMA advocates specifically for producers based in France. The structure of the industry also reveals ongoing exchanges and, at the same time, different historical pathways, as well as industrial differences between Western and Eastern Europe. This feature is exemplified in the animation sector, where both a continent-wide association of European animation producers (Animation in Europe) and a regional organisation representing Central and Eastern European producers (CEE Animation) operate side by side. The industry encompasses independent producers and distributors as well as vertically integrated major companies (i.e. Banijay and Studio Canal). It includes all the EU Member States and fosters close—and in some cases, merged—relationships with associated film markets and full members of the Council of Europe including the United Kingdom, Turkey, Switzerland or Norway, while maintaining dynamic—and often ambivalent—ties with Hollywood studios and US-based global streaming platforms. Besides, the European Film Industry spans a wide spectrum—from art-house cinema and large-scale productions that rival Hollywood, such as Luc Besson's blockbusters, to experimental film culture and low-budget, domestically popular national films. Ultimately, in Europe, major film festivals such as Cannes, the Berlinale, the Venice Film Festival, the International Documentary Festival Amsterdam and the Annecy International Animation Film Festival provide vital transnational spaces that facilitate cultural and trade exchanges among professionals in the global film industry, as well as contribute to processes of artistic legitimisation. Although all these festivals are not exclusively tied to the European Film Industry, their development and continued prominence have also been made possible by the European welfare cinema system established in the aftermath of the Second World War. This system became a cornerstone for the steady development of the European Film Industry, supporting its institutions, professionals, talents and networks across national borders (de Valck, 2007; Jones, 2024; Mitric, 2025; Meir & Smits, 2024).

Overall, while the broader notion of “European” in the European Film Industry may encompass non-EU countries and pan-European cooperation, the focus of our book is on the EU as a cultural, political, economic and regulatory actor promoting its film industry abroad. The term EFI is thus used to highlight the European audiovisual works, 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 category, but as a political-economic construct shaped by EU policy, market integration, regulation and governance structures (Sarikakis et al., 2024, 2026; Vlassis, 2022; Fernandes & Vlassis, 2026). 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.

In this complex landscape, access to international markets has become both a strategic priority and a persistent challenge for the EFI (Dâmaso et al., 2026; Vlassis, 2025). Structural limitations, such as linguistic fragmentation, cultural heterogeneity and uneven production capacities, continue to hinder the pan-European and global reach of European films (Crane, 2014; Vlassis, 2022). Cultural and linguistic barriers significantly constrain intra-European circulation, contributing to the predominance of national markets (Poort & Van Tijn, 2020). In 2023, 68% of total admissions for European films originated in their domestic markets, with only 23% stemming from other EU countries. These figures highlight a continued reliance on local audiences and the limited success of cross-border distribution within the EU (Fioroni, 2024).

Beyond the European Union, the presence of European films in international markets remains a challenge for various stakeholders. On the one hand, studies point to persistent difficulties in gaining visibility and securing market share globally, with only a few titles achieving widespread recognition (Sanz Lara et al., 2022). Scholars have highlighted that these challenges stem not only from the linguistic and cultural specificities of European films, but also from structural imbalances in promotional capacity and distribution infrastructure (Poort & van Tijn, 2020). On the other hand, the EU is recognised as one of a selected group of global centres for motion picture production (see Figures 50 and 51 in

the Annex), alongside countries such as the United States, China, India, South Korea and Japan, all of which achieve high levels of annual film output (Vlassis, 2025).

At the same time, public funding and regulatory measures within the EU have successfully supported the development of strong national film industries in several Member States, including France, Spain and Germany. These policies contribute to a rich offering of cultural diversity and help ensure that certain EU films achieve geographically diverse international reach (Vlassis, 2025). Overall, the international market is characterised by strong asymmetries, where global players benefit from consolidated networks, extensive promotional budgets and centralised control over data and distribution channels (Micova & Jacques, 2020). Besides, the expansion of transnational VOD platforms, particularly US-based global players, has disrupted traditional distribution models while introducing new gatekeeping structures, often outside European regulatory frameworks. These platforms have emerged as dominant actors in the audiovisual industries, reshaping the audiovisual media landscape through their infrastructural power and scale (Albornoz & Leiva, 2019; Evens & Donders, 2018; Lobato, 2018). Their algorithmic systems, recommendation engines and global catalogues grant them gatekeeping power, thus influencing what content becomes visible, discoverable and marketable across national boundaries (Frey, 2021; Johnson, 2019; Lobato, 2019; Ranaivoson, 2019). This shift raises issues about cultural representation and identity, as algorithmic curation tends to favour content with universal appeal over more localised or culturally specific narratives. Moreover, the rise of VOD platforms as both distributors and producers has altered traditional models of content financing, commissioning and copyright ownership, thereby disrupting long-standing production ecosystems and their ability to regenerate, and challenging the sovereignty of national and regional audiovisual sectors (Dâmaso & Rex, 2025; Jenner, 2018; Lacourt et al., 2023; Wayne, 2018).

In addition, the EU has long positioned itself as a global normative actor, using cultural diplomacy as a strategic tool to promote values such as cultural diversity, freedom of expression and democratic governance (Portolés, 2019). This approach was reinforced with the adoption of the 2005 UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions, which the EU actively champions in its external relations. The European Agenda for Culture in a Globalizing World (2007) further consolidated this commitment, recognising culture

as a central pillar of the EU's foreign policy (Loisen & De Ville, 2011; Vlassis, 2016). As a promoter of the 2005 Convention, the EU seeks to embed cultural norms and audiovisual cooperation within broader economic and political frameworks. Audiovisual policy has thus become a key dimension of the EU's cultural diplomacy (or cultural relations, Dâmaso, 2021), albeit in a rather ad hoc and unstructured manner, which is used to strengthen ties with partner countries and regions. Through technical cooperation agreements and international cultural instruments, the EU encourages the adoption of regulatory models aligned with its own standards. This is evident in its partnerships with South Korea (Loisen & De Ville, 2011; Vlassis, 2016) and with the Latin American region (Fernandes, 2025). These actions demonstrate the EU's support for the development of audiovisual policies beyond its borders. However, the outcomes of these initiatives remain contested. Scholars have pointed to a structural ambivalence in the EU's international audiovisual strategy, which often merges cultural goals with trade objectives. While promoting diversity in rhetoric, the EU has also been criticised for using cultural cooperation clauses to legitimise economic interests in bilateral trade agreements (Pauwels & Loisen, 2016). Furthermore, these initiatives have been challenged for adopting a top-down approach, often lacking meaningful engagement with local stakeholders and failing to consider local policy contexts and priorities (Fernandes et al., 2021; Vlassis, 2016). In the current context marked by the growing influence of VOD platforms in the audiovisual market, the EU's regulatory efforts have yet to resonate significantly beyond its borders (García Leiva et al., 2025). Additionally, evidence suggests that the EU's normative influence is weakening in regions such as Latin America, where VOD platforms are increasingly shaping policy debates and agendas (Fernandes & Albornoz, 2023; Fernandes, 2023a, 2023b). Alongside these criticisms of the EU's global audiovisual policy, structural changes to the global film market further reinforce the need for its reframing. Streaming services are influencing not only the development (or lack) of national regulatory frameworks in various countries but also transforming power relations across the production, distribution and exhibition sectors. These challenges are further amplified in a global market dominated by Hollywood. Although other players, such as Bollywood, Nollywood and Chinese cinema, have emerged in recent years, Hollywood's supremacy remains firmly in place. The arrival of streaming services has created opportunities

to somewhat challenge the long-standing dominance of traditional Hollywood studios over global media flows and consumption patterns (Smits, 2024). Still, even if it is true that digital technologies have expanded the scope of media distribution and consumption, promising a more democratic and diversified media landscape, the impact on the EFI has been mixed. Although US-based global streaming services like Netflix, Disney+, HBO Max and Prime Video have opened up opportunities for selected European productions to reach wider audiences than was previously possible, they have also significantly altered viewing habits, exerting an even greater impact on cinema consumption patterns that were already in transformation (Albornoz & Krakowiak, 2023; Alvaray, 2023; Falicov, 2019).

The research purpose of the edited volume is, thus, twofold: firstly, to consider whether the EU's film sector has the policy tools, desire and potential audiences to fulfil the role of a film enabler (Dâmaso, 2025) in the global cultural politics and economy. Secondly, to analyse in what ways taking such a role would strengthen the EU's capacity to counter-balance the currently dominant role in global audiovisual flows of the United States. Transversally to these two axes, the book provides a critical reflection on the global market logic that characterises the operation of transnational US-based streaming platforms, seen (as explained before) as a dominant development in the audiovisual industry. In its contested position between national and supranational interests and drivers, the examination of the changing position of the EU within the global audiovisual politics and economy can be seen to mirror a debate that is central to the history and the future of the European project, that is, how "to negotiate and reconcile the desires of cultural specificity and national identity with the larger ideal of [a]supranational community" (Bergfelder, 2005: 315).

In order to analyse the two research purposes mentioned above, the volume is organised into three interlinked dimensions:

- (i) European audiovisual regulation and policies;
- (ii) perceptions and strategies of European and non-European film professionals;
- (iii) audiences and global audiovisual markets.

The first dimension concerns the regulatory and policy framework for audiovisual/film industries within the EU and the ways how this framework could allow the EU to build the status of international film enabler. The second one refers to how EU- and non-EU-based film professionals perceive the role of the EU and of the EFI in the international film market, understand the Europeanness of the EFI, and what strengths and gaps they identify in its international competitiveness. Finally, the third dimension investigates audience reception of European film and explores how (and if) European films navigate the difficult balance between cultural specificity and universal appeal. With this approach, the edited book seeks to offer a multidimensional analysis to understand the particularities of the EU as a potential global film enabler in an evolving technological and geopolitical context.

BOOK STRUCTURE

The structure of the volume reflects this idea. Its contributors examine EU film and audiovisual policies, the views of film professionals and the preferences of audiences to assess to what extent existing frameworks on the one hand and the needs and desires of professionals and viewers on the other hand are aligned with this new EU role. Moreover, the analysis avoids the traditional focus of most scholarly analyses of the EFI: its large film markets. Rather, the volume combines insights deriving from several small markets in the EU (Croatia, Denmark, Estonia, Flanders–Belgium, Ireland, Lithuania and Portugal), a survey targeting international young people living in the EU, global young audiences of Hollywood, Bollywood and Nollywood films, and professionals in six non-EU film industries (Argentina, Brazil, Mexico, South Korea, Turkey and South Africa), including a chapter that examines persistent European Union–Global South inequities by focusing on South Africa.

The chapters presented in this work are enriched by research from two Horizon Europe 2023–2026 projects: REBOOT and CresCine, each examining the EFI from unique perspectives. REBOOT delves into enhancing the competitiveness of EU film, focusing on the interplay between national, regional and global dynamics, while CresCine focuses on small European markets, providing detailed insights into local industries, audience engagement and regulatory environments. The integration of findings from both projects offers a comprehensive view of the EFI, shedding light on its macro- and micro-level dynamics. This multifaceted

analysis is reflected in the chapters and incorporated into the overarching narrative of the book, providing readers with a broad perspective on the current state and future potential of European film.

The book is structured around three key sections: Regulation and Policy Practices, Framings and Strategies of Film Professionals, and Audiences and the Global Film Market.

Firstly, the three chapters that open the first section examine how European film policies are being reshaped in response to the growing influence of global VOD platforms and the evolving role of the European Union in film-audiovisual regulation and international audiovisual relations. Across these chapters, the EFI is framed as a culturally significant asset that embodies identity, heritage and shared values, which justifies sustained policy intervention. The transition from traditional broadcasting to on-demand digital environments emerges as a central challenge, prompting the evolution of earlier tools such as screen quotas into new mechanisms like catalogue quotas, prominence requirements and investment obligations for VOD services. Together, the chapters offer complementary perspectives on how EU Member States navigate the intersection of national priorities, EU-level frameworks and global film market dynamics. They collectively highlight that these policies operate across multiple scales—EU-level frameworks and national implementation—and reveal tensions, but also complementarities among countries of different sizes and industry maturities. Whether examining small markets balancing competitiveness, or larger producers like France and Spain projecting their industries internationally, a common thread is the negotiation between national interests, the overwhelming presence of global VOD platforms and the EU's broader ambition to act as a global film enabler.

Chapter 2 examines how the EU has adapted its policies to protect and promote European cinematographic works in light of viewing shifts from traditional broadcasting to digital platforms. Building on earlier “screen quotas,” the EU has introduced online “catalogue quotas” and prominence requirements to ensure European films remain visible in streaming environments. The chapter critiques current legal frameworks in the Digital Single Market and warns that automated recommender systems on platforms may undermine these goals. It argues that the “prominence of European works” should be treated as a defensive policy tool to safeguard visibility and competitiveness in the digital era.

Chapter 3 focuses on the implementation of investment obligations for VOD services, a policy tool strengthened in the 2018 revision of the AVMSD. By comparing four small European markets—Flanders, Portugal, Croatia and Denmark—with larger and more established regulatory contexts such as France, Germany and Italy, the chapter highlights how different national approaches seek to support domestic audiovisual production while preserving competitiveness in the global film industry. It shows how investment obligations and quota rules have become central instruments through which Member States position themselves within the EU's broader ambition to act as an international film enabler.

Chapter 4 turns to France and Spain, two large film producers in the EU, in order to analyse how national institutions promote their film industries abroad and how they navigate the EU's engagement in external cultural–film relations. Through policy analysis and interviews with key stakeholders, the chapter also reveals how national and EU strategies converge or diverge when addressing the challenges posed by international film promotion and global VOD platforms. Additionally, it considers whether these practices create tensions or synergies within the shared European project of strengthening the international visibility and influence of European cinema. Taken together, these chapters illuminate the multilevel governance of European audiovisual policy, showing how national and EU actions intertwine to respond to global transformations in film production, distribution and promotion.

Secondly, as global VOD services reshape audiovisual markets—altering business models, content curation, data access, marketing practices and intellectual property regimes—European stakeholders confront both new opportunities and renewed concerns over competitiveness, cultural diversity and regulatory efficacy. At the same time, Europe's long-standing role in international cultural exchange, particularly with partners in the Global South, remains marked by structural inequalities that complicate ambitions of cooperation and cultural dialogue. As such, the contemporary film landscape is being reshaped by two intertwined dynamics: the growing dominance of global VOD platforms and the enduring asymmetries that shape collaborations between European institutions and filmmakers from the Global South. On the one hand, US-based global VOD services have transformed how audiovisual content is produced, circulated and consumed. Their rise brings new avenues for visibility and market expansion, yet also heightens concerns over market concentration, reduced cultural diversity and widening regulatory gaps.

In Europe, these developments intersect with long-standing policy goals aimed at strengthening a competitive and culturally diverse film industry. On the other hand, Europe's engagements with filmmakers and institutions from the Global South—whether through financing, festival participation, market access or co-production opportunities—remain fraught with persistent inequities.

This book brings these interconnected dynamics into focus by examining how industry professionals themselves perceive and navigate these shifts. Drawing on extensive empirical research—including interviews and surveys with European and non-European film professionals—it highlights how the EU intersects with entrenched Global North–Global South disparities, while European and non-European professionals increasingly look to regulatory frameworks to mitigate the disruptive effects of VOD consolidation and film professionals—mostly from the Global South—continue to face barriers to strengthened collaboration, from limited financing and restricted creative agency to constrained access to festivals and markets.

Chapter 5 explores how European film professionals assess the impact of VOD across five key areas identified in the literature: business and policy disruption, algorithmic content curation, data access, marketing strategies and intellectual property control. Drawing on original empirical research, including 37 in-depth interviews and a pan-European survey of over 400 film professionals, the chapter examines the extent to which these concerns are reflected in industry perceptions. It also examines how professionals support current EU regulatory efforts, particularly the AVMSD, in addressing these challenges. By centring professional perspectives, the chapter offers critical insights into the evolving dynamics between global platforms and the European film sector.

Based on data gathered for REBOOT through 99 interviews with local film professionals and film stakeholders in six non-EU markets (Argentina, Brazil, Mexico, South Korea, South Africa and Turkey) regarding local market needs and 425 survey respondents, Chapter 6 assesses whether the competitiveness of the European Film Industry could be strengthened with the addition of a market-creating policy dimension to the existing EU film policy agenda. The chapter begins by identifying the main challenges faced by film markets in Argentina, Brazil, Mexico, South Korea, South Africa and Turkey. The chapter summarises the main needs of these six film markets as perceived by their film professionals and stakeholders, and the ways the EFI is understood therein, before focusing on film

festivals and the role of embassies in establishing new alliances between the EU and these non-EU markets to support the development of local sustainable film industries.

Finally, Chapter 7 explores the complex relationships between European film institutions and professionals and their counterparts in the Global South, focusing on South Africa. Despite shifts in European cultural discourse towards partnership and dialogue, South African filmmakers still experience structural inequalities in financing, co-production arrangements and access to festivals, which limit their creative control and market opportunities. Drawing on interviews with filmmakers and support organisations, the chapter highlights how these power imbalances reproduce colonial dynamics and hinder the growth of a sustainable local film industry, arguing for more ethical, equitable, and empowering forms of collaboration.

Thirdly, understanding how audiences—especially young and international viewers—engage with European cinema is essential to assessing the continent's cultural reach and competitiveness in a globalised audiovisual landscape. While Europe hosts nearly 29 million non-EU citizens, their perspectives remain largely absent from research on European film. Chapter 8 of the last section shows that young international residents in the EU express strong interest in European cinema, valuing its artistic ambition and social realism, yet they also encounter barriers related to accessibility, marketing and cultural resonance. Their viewing practices are shaped by digitalisation, streaming platforms and social media, which now function as primary gateways to film consumption, even as cinema-going retains significant social appeal.

At the same time, Chapter 9 focuses on a review of youth film preferences, which reveals that young audiences engage with cinema in ways deeply influenced by their cultural and technological contexts. Indeed, across Hollywood, Bollywood, Nollywood and Europe, youth remain the most frequent moviegoers, though their genre preferences and national loyalties differ widely. The chapter reveals that in Europe, young people favour Hollywood productions over domestic films, underscoring a widening gap between EU cultural ambitions and what young audiences actually consume. This global tendency towards non-European content highlights the urgency of better understanding how young viewers perceive European cinema, and how industry strategies might adapt to shifting audience tastes.

Complicating these dynamics are the challenges faced by Europe's small film markets and the preferences of their domestic audiences. Chapter 10 reveals that recent data from seven small European markets demonstrate limited overlap between local box-office successes and films that perform well abroad, making it difficult for producers to satisfy both constituencies within existing production capacities and policy frameworks. Interviews with domestic audiences reveal distinctive expectations for national cinema, suggesting that policy adjustments—at both national and European levels—may be needed to bolster small-market capacity while appealing to broader audiences.

Taken together, these findings illuminate the complex terrain of audience engagement with European cinema today. They point to the need for policies and industry practices that better address the tastes of young and international audiences, strengthen the visibility of small-market productions and align Europe's cultural objectives with the realities of a rapidly evolving global film industry.

Overall (see Chapter 11), the volume demonstrates that the European Film Industry is at a critical crossroads, shaped by the simultaneous pressures of global platformisation, persistent structural inequalities and shifting audience practices. By combining policy analysis, industry perspectives and audience research across large and small markets, the book reveals both the ambition and the limits of the EU's evolving role as a cultural, regulatory and economic film enabler. The findings show that while regulatory tools such as quotas and investment obligations remain central, their effectiveness depends on multilevel coordination. Importantly, the perspectives of film professionals expose how global VOD dominance challenges cultural diversity, data transparency and creative autonomy. The chapters focusing on the Global South further underscore that Europe's external film relations continue to reproduce power asymmetries that call for more ethical and equitable modes of collaboration. Audience-focused analyses highlight a persistent misalignment between European cultural objectives and the viewing preferences of young and international audiences. Small markets, in particular, face constraints that complicate both domestic success and international circulation. Taken together, the book argues for a more integrated, reflexive and inclusive European film policy framework.

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PART I

Regulation and Policy Practices



CHAPTER 2

Catalogue Quotas vs Automated Recommender Systems: A Proposal to (Re)Conceptualise the “Prominence of European Works” as a Defence for International Competitiveness of Diverse Cinematographic Works

Pelin Turan and Caterina Sganga

INTRODUCTION

Cinematographic works have been a cornerstone of the cultural policies and agenda of the European Union (EU) since the late 1980s (Resolution OJ C 320/4, Communication COM 86/0320; Council Resolution OJ C 43/6). The value the EU attributes to cinematographic works stems from the multifaceted nature of audiovisual content in general

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and of cinematographic works in particular (Turan et al., 2025). From an economic perspective, cinematographic works are cultural goods that yield economic returns for the market actors involved in the filmmaking lifecycle and retail chain (Resolution OJ C 320/04; Resolution OJ C 85/02; Communication OJ C 332/1). From a cultural perspective, cinematographic works embody the artistic and creative expression of their authors, enabling them to convey their message to audiences across borders and over time (Resolution OJ C 320/04; Resolution OJ C 85/02; Communication OJ C 332/1; Turan & Sganga, 2025). Last but not least, from a social perspective, cinematographic works are tools which capture, record and safeguard the cultural identity, collective memory and imagery, common history, and communal values of the society from which they originated; furthermore, they help transmit such information and knowledge from one generation to another (Resolution OJ C 320/04; Resolution OJ C 85/02; Communication OJ C 332/1). This complex composition of cinematographic works transforms European cinematographic productions into strategic assets with cultural, social and market-related significance, while positioning the European Film Industry (EFI) at the intersection of (cultural, economic, social) power, competitiveness and identity.

An overview of the EU's audiovisual policies and agenda, especially those devised in the last three decades, demonstrates the EU policymakers' praise of the rich and diverse nature of European cinematographic works and the EU's gradual efforts to preserve, enhance the availability and accessibility, and foster the global reach of European cinematographic works. From the 1980s until the early 2000s, several EU policies aimed at boosting the competitive power of the EFI and targeted the "availability" of European cinematographic works in screening programmes of traditional distribution channels, specifically television broadcasts (Psychoiopolou et al., 2025). The first wave of European audiovisual legislation introduced "screen quotas" for the transmission of European content in European television broadcasts, to ensure the prominence of European cinematographic works over non-European ones (Chiang, 2007; Graber, 2006; Hahn, 2006; Iordache et al., 2025; Pauwels & Loisen, 2003). Nevertheless, this legislative framework soon required an update due to the digital switch-over and the platformisation phenomena, both triggered in the late 1990s by technological advances in the audiovisual sector and the widespread use of the Internet (Iordache et al., 2025). These phenomena paved the way for legislative interventions to adapt

screen quotas to the particularities of online platforms, primarily by introducing “catalogue quotas” (Vlassis, 2023). However, the outbreak of the global COVID-19 pandemic in 2020, which imposed global lockdowns and physical access restrictions on movie theatres, while increasing online consumption of cinematographic content, also required the amendment of the Union’s audiovisual policies and agenda to develop a future-proof audiovisual strategy (Council conclusions OJ C 501 I/7). Indeed, the shift in market trends from traditional to online consumption eventually proved that focusing on the mere “availability” of European works in the content catalogues of online platforms would not necessarily guarantee the “visibility” and “discoverability” of such content by users in the large content catalogues of global video-on-demand (VOD) platforms (Council conclusions OJ C 501 I/7). Aside from the challenges introduced by the abundance of works contained in such catalogues, another factor raises also questions on the visibility and discoverability of European works through the interface of the VOD platforms: the deployment of automated recommender systems, often powered by artificial intelligence (AI) tools, by the major VOD platforms to manage content curation and promotion of cinematographic content, including also the trailers, excerpts, posters of the cinematographic works available therein.

On the one hand, the digitisation of the European audiovisual sector and the ever-increasing dominance of non-European VOD platforms over traditional distribution channels demonstrate the “availability, visibility, and discoverability” divide that characterises (the fragility of) the digital promotion of European cinematographic works. On the other hand, this market reality requires a meticulous assessment of the current EU normative framework, directly and indirectly regulating the global VOD platforms that deploy automated recommender systems and operate in the EU Digital Single Market (DSM).

Against this background, this chapter focuses on the “availability, visibility and discoverability” divide that underpins the digital distribution and exhibition of European cinematographic works via global VOD platforms, while framing the topic within the broader socio-political and legal *milieu*. It offers an insight into the chronology of the policy and legal responses adopted by the EU to foster the competitiveness of the EFI vis-à-vis technological advancements, the global pandemic that marked 2020 and its aftermath, as well as the projections of these two major phenomena on the international and European audiovisual market trends and consumer behaviour.

The chapter begins with an overview of the policy background concerning the digital distribution of European cinematographic works to map the policy and legislative gaps identified and the policy items covered by the EU policymaker. Subsequently, it analyses two key regulatory responses introduced by the EU legislator to foster the prominence of European cinematographic works. First, it glances at the screen and catalogue quotas introduced, respectively, by the Council Directive 89/552/EEC (Television Without Frontiers Directive, TVWFD) and Directive 2010/13/EU (Audiovisual Media Services Directive, AVMSD). Then it explains how automated recommender systems categorise, curate, and promote content on global VOD platforms. It analyses the ways in which the recently adopted Regulation (EU) 2022/2065 (Digital Services Act, DSA) might be adapted to current market realities in the European audiovisual sector and transplanted into the AVMSD to regulate the market behaviour of global VOD platforms operating in the DSM. Building on these theoretical premises, the chapter assesses the efficacy of the current EU policy and legislative framework for enhancing the EFI's competitiveness in the global digital audiovisual market. The chapter suggests reconsidering the catalogue quotas without divorcing them from automated recommender systems, which curb the catalogue quotas' potential to promote European cinematographic works. On that note, the chapter advocates (re)conceptualising the "prominence of European works" as a defence rather than a normative notion with an end in itself, and it seeks for a novel way to substantiate this concept to reinforce the EFI's competitive power in the digital audiovisual market.

AN OVERVIEW OF THE UNION POLICIES ON THE DIGITISATION OF THE DISTRIBUTION AND EXHIBITION OF EUROPEAN AUDIOVISUAL WORKS

The EU policy agenda on the digital transformation of the European audiovisual sector has historically revolved around three key objectives: safeguarding media pluralism, protecting cultural and linguistic diversity, and protecting minors (Communication COM(1999) 657 final; Communication COM(2001) 0535 final). These objectives have been essential in shaping the Union's action plan and in keeping pace with global market realities and trends. Guided by these goals, the EU legislator has

embraced the innovation enabled by digital technologies in the audiovisual sector, particularly in the distribution and exhibition of diverse audiovisual content, while also expressing certain reservations to address the globalisation of the European audiovisual market.

In the late 1990s and onward, the EU digital agenda signalled the potential adverse impacts of the digitisation of the audiovisual sector on the European cultural, economic and social landscape. It highlighted the need to ensure the EU's cultural and technological sovereignty¹ against globalisation and to prevent the European audiovisual market's penetration by a vast amount of imported cultural goods, or in other words, non-European audiovisual works (COM(1999) 657 final; Pauwels & Loisen, 2003; Graber, 2006; Hahn, 2006; Chiang, 2007). However, the impetus in the proliferation of digital platforms since the late 1990s and the ever-growing preeminence of online streaming platforms over the traditional distribution channels of audiovisual content ended up adding a new—and, seemingly, a permanent—item to the Union's audiovisual agenda: fostering the competitiveness of the European audiovisual sector by maintaining the *prominence* of European works in the global VOD platforms, including those owned by non-European market actors. This objective was deemed essential for the success of the EU's cultural diversity policies, given its potential to counterbalance the influx of non-European works to the European audiovisual market.

At first, the launch of VOD platform services by global (or non-European) market players in the European audiovisual market was not deemed to “[occur] at the expense of existing means such as the cinema and video market (both cassette and DVD)” (COM(1999) 657 final). Instead, it was considered a complementary service “rather than substituting for existing means of providing audiovisual content” (COM(1999) 657 final). Yet, the European Commission's Green Paper on the online distribution of audiovisual works in the EU, which was published in 2011 to reflect on the first decade of the digitisation of the European audiovisual sector and the platformisation phenomenon, stressed that “[t]he

¹ One of the earliest public policy documents concerning the digital transformation of the EU articulates the European technological (or digital) sovereignty as the ability of Europe “to develop and deploy its own capacities, thereby reducing [its] dependency on other parts of the globe for the most crucial technologies” whilst having the opportunity to define its own rules and values by taking into consideration “the needs of Europeans and of the European social model”. See: Communication COM(2020) 67 final.

emerging market for Video-on-Demand services in Europe is dynamic, diverse and growing rapidly, though nevertheless currently lagging behind the [United States (US)]” (Green Paper COM(2011) 0427 final). This market reality marked the next phase of Europe’s digital experience with the audiovisual sector, and not merely because of the rapid changes in the audiovisual technologies and the improvement of Internet broadband, but also due to the outbreak of the COVID-19 pandemic in 2020, which has become a turning point (or, a point of no return) for the global and European audiovisual sectors. The pandemic had spill-over effects on the well-established EU policy agenda and the strategies of market actors, not only because it raised questions on the digital sovereignty of the EU in general, but also for it revealed that the European audiovisual sector ought to adopt new strategies to boost the sector’s capacity to compete with the global actors, mainly those of US origin, dominating the international and European audiovisual markets (Vlassis, 2019, 2021).

Among the plethora of EU policy documents on the audiovisual sector, the Council Conclusions of 13 December 2021, adopted shortly after the COVID-19 pandemic, acknowledged “the availability and effective accessibility of European audiovisual and media content” (Council conclusions (2021/C 501 I/02)) as a factor essential for the sustainability of the European audiovisual sector’s power to compete globally. It emphasised the need to find alternative methods to distribute European audiovisual content and secure the “adequate prominence of European audiovisual works and media content (...) in view of the global audiovisual and media content service providers and platforms” (Council conclusions (2021/C 501 I/02)). The Conclusions, while admitting the challenges concerning the discoverability of European audiovisual content on global VOD platforms, stressed the need to identify the reasons for the “uneven visibility of [European] works across different markets” (Council conclusions (2021/C 501 I/02)).

At the time, the European Commission envisioned three responses to the aforementioned “visibility” conundrum. As a first step, it promoted the successful transposition of the 2018 revision of the AVMSD to reinforce the digital distribution and online availability of European audiovisual content (Communication COM(2020) 67 final). Secondly, it proposed an assessment on the viability of launching a European online streaming platform to guarantee the digital exploitation of European

audiovisual content in the EU, also as a means to secure the EU's digital and technological sovereignty (Communication COM(2020) 67 final). Finally, the Commission highlighted the need to "increase the number of European audiovisual works in the [VOD] catalogues" (Communication COM(2020) 67 final) and to proceed with an assessment of different means to disseminate European content at the national, European and international levels (Communication COM(2020) 67 final). Whereas these policy debates mainly revolved around the "availability" of European audiovisual content, the deployment of automated recommender systems in the global VOD platforms urged the Commission to revisit the "uneven visibility of [European] works" (Council conclusions (2021/C 501 I/02)) among the content available in the catalogues of such global platforms.

Along the same lines, the European Parliament Resolution of 19 May 2021 analysed the challenges faced by the European audiovisual sector, taking into account the automated recommender systems, including those powered by AI, deployed by global VOD platforms. The Resolution drew attention to the omnipresence of AI in the audiovisual sector, ingrained at multiple stages of the audiovisual value chain, from creation to production, distribution, localisation and consumption (Council conclusions (2021/C 501 I/02)). Addressing the infamous "black box" conundrum, that is the overall lack of transparency of AI systems (see in general: Pasquale, 2015), it further flagged the risks posed by automated recommender systems to the cultural and linguistic diversity of audiovisual content and the hardship in ensuring the compliance of these algorithms with the measures introduced by the AVMSD to foster the availability of European audiovisual content on online streaming platforms operating in the EU. As a coping strategy, the Resolution advocated for a human-centric approach that would empower users of VOD platforms by providing them with "accurate and comprehensive insight into these processes and content" (Council conclusions (2021/C 501 I/02)), to let them make informed decisions when engaging with digital cultural content (Council conclusions (2021/C 501 I/02)). In this regard, the Resolution stipulated that the online streaming platforms "should be designed in such a way that they do not privilege specific works by limiting their 'personalised' suggestions to the most popular works, for targeted advertising, commercial purposes or to maximise profit" (Council conclusions (2021/C 501 I/02)).

The issues identified in the Union policies concerning the “availability, visibility and discoverability” divide laid the groundwork for subsequent legislative interventions. Since the late 1980s, the EU legislator has enacted multiple legal instruments and amended the existing legal framework to accommodate the needs and expectations of the European audiovisual sector while defending the Union’s cultural and digital sovereignty. These legislative measures have included adopting and amending the TVWFD and AVMSD to offer immediate solutions to problems with the availability of European audiovisual content on global VOD platforms by introducing and revising screen and catalogue quotas. More recently, the DSA intervened to regulate the operation of digital platforms—including content-sharing platforms such as YouTube, TikTok and Instagram (European Commission, 2025)—that employ automated recommender systems, to enhance transparency into the technologies underpinning their operations, thereby offering signposts that might help navigate through the AVMSD’s content “visibility and discoverability” conundrum.

In a highly platformed digital space, the interaction between screen and catalogue quotas and automated recommender systems requires attention, especially to assess whether there is a need for policy and legislative reform to support the Union’s policy and legal tools and ensure the prominence of European cinematographic content. Screen quotas for European content, which were tailored for television broadcasts, historically ensured not only the “availability” but also the “visibility and discoverability” of European works on the main distribution channels, given the highly probable “likelihood of coming across content/services” (Garcia Leiva, 2025, p. 285) on linear distribution channels. However, the same cannot be said of the catalogue quotas envisioned for online platforms, which, unlike television broadcasts, are dictated by algorithms that influence, if not manipulate, users’ decision-making and control capabilities in various ways. In this sense, it is essential to take a glance at the screen/catalogues provided by the TVWFD and the AVMSD and at the regulation of online platforms, and automated recommender systems by the DSA to assess their effectiveness in reinforcing the EFI’s global competitiveness.

CATALOGUE QUOTAS: ENSURING THE AVAILABILITY OF EUROPEAN CINEMATOGRAPHIC WORKS ON GLOBAL VIDEO-ON-DEMAND PLATFORMS

The protection and promotion of cultural diversity—a key objective of EU policies on the European audiovisual sector and the linchpin of the Union’s overarching cultural agenda—have historically played an important role in establishing the Union’s initial normative framework to ensure the EFI’s competitiveness. Cultural diversity, both as a legal concept and as an ideal, was crystallised through the global norm-setting endeavours under the auspices of the United Nations (UN) in the early 2000s (see: UNESCO, 2001, 2005). It was devised as a normative concept to address the adverse effects of economic globalisation on transatlantic and cross-border trade in cultural goods and services, including television programmes and cinematographic works (Psychogiopoulou et al., 2025; Vlassis, 2021). The UN instruments on cultural diversity laid the foundations of the notion of “cultural sovereignty” by recognising and respecting each State’s discretion “to define its cultural policy and to implement it through the means it considers fit” (UNESCO, 2001, Art. 9). The principles that underpinned cultural diversity were already deeply rooted in the then-European Economic Community’s (EEC) legal framework (Psychogiopoulou, 2015, 2024; Psychogiopoulou et al., 2025), which also informed and regulated the European audiovisual sector, the promotion of European works and its interaction with non-European market actors.

In this regard, the TVWFD, adopted in 1989 and amended in 1997 and 2007 before being repealed in 2010 by the AVMSD, is the foundation of the EU’s audiovisual regulatory framework. Aligned with the main principles and freedoms regulating the internal market and enshrined in the founding treaties of the EU, the primary goal of the TVWFD was to ensure the free movement of television broadcasting services within the EU while upholding the core values that have informed and guided the Union’s audiovisual policies (e.g. preservation of cultural diversity, protection of minors) (Council Directive 89/552/EEC, Preamble). In so doing, the Directive set minimum standards for broadcasting organisations, while leaving EU Member States the margin to introduce norms beyond this benchmark (Council Directive 89/552/EEC, Art. 3(1); also see: Directive 2010/13/EU, Art. 3(1)). The scope of the TVWFD was limited to broadcasting organisations transmitting television programmes

under the jurisdiction of an EU Member State, as well as those utilising a frequency or satellite capacity granted by or situated in a Member State without necessarily being under the jurisdiction of any Member State (Council Directive 89/552/EEC, Art. 2(1); also see: Directive 97/36/EC, Art. 2; Directive 2007/65/EC, Art. 3).

One of the defining features of the TVWFD was the range of tools it employed to ensure the distribution and exhibition of European television programmes. The Directive adopted a broad definition of “European works” in line with the features that EU policymakers attribute to cinematographic works, as well as with the multilateral conventions to which several EU Member States are parties.² In this regard, the “European-ness” of works was closely associated with Europe as a continent, hence stretching beyond the border of the EU and encompassing the non-EU members of the Council of Europe Members, and with the history, common values and communal imagery of European societies at large (also see: Council Directive 89/552/EEC, Art. 6; Directive 97/36/EC Art. 7; also see: Directive 2010/13/EU, Art. 6).

To preserve and promote the common cultural heritage and expressions of European societies, the TVWFD introduced “screen quotas” or, more precisely, “transmission times”, allocated to the transmission of European works, including independent productions (Council Directive 89/552/EEC, Art. 4, Art. 5; also see: Directive 2010/13/EU, Art. 16). The TVWFD required broadcasting organisations within the scope of the Directive to reserve, to the extent possible, the majority of their transmission time for European works (Council Directive 89/552/EEC, Art. 4(1)). In a similar vein, it held that at least 10% of the transmission time of a broadcasting organisation should be allocated to independent productions (Council Directive 89/552/EEC, Art. 5). However, this provision adopted a more flexible approach by enabling the replacement of such screen quotas with a financial contribution equivalent to a minimum of 10% of the broadcaster’s programming budget to the production of such independent content (Council Directive 89/552/EEC, Art. 5).

It is worth noting that the screen quotas envisioned by the TVWFD also applied to cinematographic works (Council Directive 89/552/EEC,

² See: Council of Europe, European Convention on Cinematographic Co-Productions (ETS No. 147), (adopted in 02.10.1993; entered into force on 01.04.1994); Council of Europe, European Convention on Cinematographic Co-Productions (ETS No. 220) (adopted on 30.01.2017, entered into force on 01.10.2017).

Art. 7). Indeed, the TVWFD allowed the broadcasting of European productions and co-productions (Council Directive 89/552/EEC, Art. 7; also see: Directive 97/36/EC Art. 7). More importantly, the screen quotas for television programme broadcasts have served as the blueprint for the measures taken by the AVMSD to safeguard the distribution of European cinematographic content via VOD platforms.

The first step towards adapting screen quotas to the services provided by VOD platforms was taken by Directive 2007/65/EC, which amended several provisions of the TVWFD. Article 8 of this Directive, closely following the original text of the TVWFD, required on-demand audiovisual media services provided by media service providers under the jurisdiction of a Member State to “promote, where practicable and by appropriate means, the production of and access to European works” (Directive 2007/65/EC, Art. 1). Adopting a two-tiered approach, the provision envisaged that such promotion “could relate, *inter alia*, to the financial contribution made by such services to the production and rights acquisition of European works or to the share and/or *prominence of European works in the catalogue of programmes offered by the on-demand audiovisual media service*” (Directive 2007/65/EC, Art. 1).³ In so doing, the provision introduced the concept of the “prominence of European works” into the EU legal framework, without necessarily defining it but by framing it as a venue for financial contribution to facilitate access to European works on the VOD platforms. This provision was later included in the AVMSD, which repealed the TVWFD and reformed the Union’s audiovisual legislative framework by building upon the foundations of the TVWFD.

The AVMSD, adopted in 2010 and amended in 2018 and 2024, stayed true to the policy objectives that have informed and guided the Union’s audiovisual policies and laws, as well as the core of the TVWFD. Yet, it broadened the scope of its predecessor by introducing an up-to-date legislative framework for audiovisual services in general, including both traditional media services (i.e. television broadcasts) and on-demand audiovisual services, defined as:

³ Emphasis is added.

an audiovisual media service provided by a media service provider for the viewing of programmes at the moment chosen by the user and at his individual request on the basis of a catalogue of programmes selected by the media service provider. (Directive 2010/13/EU, Art. 1(1)(g))

Adapting the TVWFD's screen quotas to digitally-distributed audiovisual content, the AVMSD departs from the two-tiered approach adopted by Directive 2007/65/EC. Article 13(1) of the AVMSD requires on-demand audiovisual service providers to "secure at least a 30% share of European works in their catalogues and ensure prominence of those works" (Directive 2010/13/EU, Art. 13(1)), unless they have a low turn-over or low audience (Directive 2010/13/EU, Art. 13(6)). As was the case in Directive 2007/65/EC, the catalogue quotas envisioned for European works apply to European cinematographic works respecting the media windows⁴ negotiated with the rightsholders (Directive 2010/13/EU, Art. 1(1)(a)(i), Art. 8). Whereas Article 13(1) of the AVMSD regulated the catalogue quotas as a mandatory provision, Article 13(2) of the Directive leaves the adoption of financial contribution schemes, which were envisioned by the TVWFD as an alternative to the measures to be taken for the prominence of European works, to the discretion of the EU Member States.

The introduction of mandatory catalogue quotas is a strength of the AVMSD, as it reinforces Union-wide efforts to enhance the prominence of European works on online platforms. Nevertheless, the AVMSD not only refrains from defining the concept, but also presents the "prominence of European works" as an obligation of the VoD platforms operating in the jurisdiction of an EU Member State, whereas this concept used to be a signpost to foster access to European works available in the catalogues of such platforms. The absence of a legally binding definition or guidelines for the measures to be taken to achieve the prominence of European works has led to significant divergences in the national implementation strategies of EU Member States (Turan et al., 2025). Whereas none of the EU Member States have enacted any provisions to define "prominence of European works" and detail the ways in which to achieve this goal (Garcia Leiva, 2025), the transposition of Article 13(1) of the

⁴ "Media window" is a concept referring to "exclusive times within particular market territories that allow for the repeated commercial exploitation of a film's intellectual property rights to maximise revenue" (Hammoud et al., 2025).

AVMSD ended up creating a significantly fragmented European legal landscape.

That said, quantitative quotas to secure the availability of European works in VOD platform catalogues do not ensure the “visibility” or “discoverability” of those works, nor their capacity to compete with other works available in the same catalogues. Besides, the obligation to allocate quantitative quotas for European works is not sufficient to counterbalance the effects of the use of automated recommender systems in today’s digital space, as all the VOD platforms utilise, to varying extents, AI-based tools to curate, rank, present and promote the content available on platforms in their quotas. Unless the EU legislator’s perception of “prominence” is limited to the “availability” of European works along with non-European works, the interaction of European works with the automated recommender systems deployed by the VOD platforms puts the efficacy of the AVMSD in question.

VIDEO-ON-DEMAND PLATFORMS AND AUTOMATED RECOMMENDER SYSTEMS: GATEKEEPERS OF VISIBILITY AND DISCOVERABILITY IN THE GLOBAL DIGITAL AUDIOVISUAL MARKET

The key objectives underlying the Union’s audiovisual policies, particularly the protection of media pluralism and cultural diversity, have been essential for flagging the risks of the digitisation of the European audiovisual sector and its impact on the competitiveness of the EFI and European works (Burri et al., 2020). Specifically, the dominance of US market actors in the global digital audiovisual sector has been under the radar of EU policymakers for at least a decade, primarily for three reasons. First, given their market share and power, global VOD platforms have become key access points for digital audiovisual and cinematographic content. Second, each global VOD platform deploys and relies, to varying degrees, on automated recommender systems, often powered by AI (Furini, 2024; Vaz-Álvarez & Lainez-Reche, 2022). These systems often lead to “algorithmic amplification” due to promoting certain content at the expense of others (Hinkle, 2021; Vaz-Álvarez & Lainez-Reche, 2022). Last but not least, the algorithms employed by these platforms, by profiling users and tracking their online habits, offer a personalised user experience, which results in “filter bubbles”, thereby curtailing users’

access to and consumption of content that departs from their search and watchlist history (Hinkle, 2021; Ranaivoson et al., 2024, p. 6; Vaz-Álvarez & Lainez-Reche, 2022). In this sense, the EU's initial appraisal of VOD platforms as new venues to exhibit various content (including the "non-mainstream" productions such as independent films, documentaries, arthouse films and archival works) has been coupled with concerns regarding their negative impact on media pluralism and cultural diversity in the EU (Wichert, 2007).

Partial solutions to these problems are presented in the EU legislator's general legislative endeavours to update the EU's DSM and data-related legislative framework, which have extended to regulations concerning online platforms and automated recommender systems. In this regard, the DSA offers "model" clauses that are already inherent in the EU legal framework and can be adapted to the EFI's needs to ensure the prominence of European works on global VOD platforms.

The DSA is the outcome of the Union's policy agenda and work plan set in 2020, primarily with the Communications of 17 and 19 February 2020, respectively titled "Shaping Europe's Future" (Communication COM(2020) 67 final) and "A European Strategy for Data" (Communication, COM(2020) 66 final). As ushered by their titles, both policy documents provided a roadmap for the EU's transition into a digitally sovereign economic power that leads the global digital market (Communication, COM(2020) 66 final). Driven by this goal, both documents stressed the importance of strengthening the competitiveness of the EU by building a European digital market that reflects EU's priorities and values, where Europe's reliance on non-European technological solutions are minimised, yet its market remains open to non-European actors as long as they are compliant with the EU values, norms and standards (Communication, COM(2020) 66 final).

Aligned with these objectives, the DSA aims to ensure the smooth functioning of the DSM through a set of uniform, mandatory rules for a safe, predictable and trusted online environment (Regulation (EU) 2022/2065, Rec. 3, Rec. 9, Art. 1(1)). To do so, the Act focuses on one of the major categories of market actors, namely providers of online intermediary services. In fact, not only does the DSA constitute the first act that legally defines "intermediary services" as a category, which encompasses "online platforms", but it also regulates the liability and due diligence obligations of these key market players (Regulation

(EU) 2022/2065, Art. 1(2)), while also taking into account the principle of consumer protection (Regulation (EU) 2022/2065, Art. 1(1)). Driven by these policy objectives, the DSA provides detailed regulations to enhance transparency in the operations of online platforms regarding their potential impact on the DSM and consumers/users. In addition to setting general rules that apply to online platforms, the DSA introduces specific, stricter rules for platforms categorised as “Very Large Online Platforms” (VLOPs) (Regulation (EU) 2022/2065, Rec. 48).

The concept of “online intermediary services” at the heart of the DSA comprises three main categories: mere conduit services, caching services, and hosting services (Regulation (EU) 2022/2065, Rec. 5, Art. 3(g)). Within this framework, online platforms, which are part of the digital audiovisual ecosystem, are classified as a sub-category of hosting services and defined as follows:

(...) a hosting service that, at the request of a recipient of the service, stores and disseminates information to the public, unless that activity is a minor and purely ancillary feature of another service or a minor functionality of the principal service and, for objective and technical reasons, cannot be used without that other service, and the integration of the feature or functionality into the other service is not a means to circumvent the applicability of this Regulation. (Regulation (EU) 2022/2065, Art. 3(i))

In line with the Union’s overall digital strategy, the provisions of the DSA apply to online intermediary services “offered to recipients of the service that have their place of establishment or are located in the Union” (Regulation (EU) 2022/2065, Art. 2(1)), irrespective of the provider’s place of establishment. In this sense, non-European VOD platforms, which are major market players, are subject to the rules established by the DSA as long as they offer their services within the EU.

Whereas there remains ambiguity regarding the application of the DSA to VOD platforms, the Act’s geographical scope and the measures it introduces to prevent the manipulation of users in the digital space and to enhance transparency regarding the operation of the automated recommender systems are inspirational for the EFI. Indeed, Articles 25, 27 and 38 of the DSA are worth considering in this regard.

Articles 27 and 38 of the DSA introduce measures to ensure the transparency of online platforms that deploy automated recommender systems, which are defined as:

a fully or partially automated system used by an online platform to suggest in its online interface specific information to recipients of the service or prioritise that information, including as a result of a search initiated by the recipient of the service or otherwise determining the relative order or prominence of information displayed. (Regulation (EU) 2022/2065, Art. 3(s))

Automated recommender systems, while improving users' experience and optimising their access to algorithmically curated information based on their profile, significantly influence the ways in which users retrieve and interact with online content, as well as the type of content offered to them (Regulation (EU) 2022/2065, Rec. 70; Ranaivoson et al., 2024, p. 3). For this reason, Article 27 of the DSA requires providers of online platforms that use recommender systems to explain in their terms and conditions, in plain and intelligible language, the main parameters used and the options available for users to modify or influence them (Regulation (EU) 2022/2065, Art. 27(1)). Such explanation should clarify why specific content is suggested to users by illustrating the most significant criteria used to determine the information to be suggested and the reasons for their relative importance (Regulation (EU) 2022/2065, Art. 27(2)). When several options are available for recommender systems that determine the relative order of information presented to users, platforms should provide the latter with a functionality that allows them to select and modify at any time their preferred option (Regulation (EU) 2022/2065, Art. 27(3)), which should be "*directly and easily accessible* from the specific section of the online platform's online interface" (Regulation (EU) 2022/2065, Art. 27(3)).⁵ In addition to the general obligations applicable to all online platforms, VLOPs must comply with stricter rules. Article 38 of the DSA obliges VLOPs to provide "at least one option for each of their recommender systems" (Regulation (EU) 2022/2065, Art. 38) that does not stem from the personal profiling of the user, which entails the automated processing of the user's personal data to analyse or predict aspects concerning their preferences.

Furthermore, although originally designed to combat dark patterns (Yi & Li, 2025, p. 12), Article 25 of the DSA may be considered complementary to the provisions mentioned above. This Article requires the adoption of transparency measures to eliminate online practices that may

⁵ Emphasis is added.

manipulate users' decision-making processes on online platforms. It holds that online platform providers "shall not design, organise or operate their online interfaces in a way that deceives or manipulates the recipients of their service or in a way that otherwise materially distorts or impairs the ability of the recipients of their service to make free and informed decisions" (Regulation (EU) 2022/2065, Art. 25(1)). In this sense, Article 25 of the DSA may help monitoring the online streaming platforms' compliance with the DSA's transparency measures, especially in cases where the platform relies on algorithms to collect users' personal data for profiling practices for an enhanced personalised user experience and the generation of a personalised interface for the home page of the online platforms they use, which subjects users to the "algorithmic amplification" and "filter bubble" phenomena.

Based on the above, it is recommended that Article 27 of the DSA be adapted to align with the realities of the European audiovisual sector and incorporated into Article 13 of the AVMSD to honour the prominence of European works. To achieve this, the EU legislator might require VOD platform service providers to list and justify, on their official websites publicly, the indicators used by their automated recommender systems to curate and present cinematographic content to users. The EFI's perspectives could serve as a guiding framework for this initiative, particularly for identifying and exemplifying the categories of information critical for the EFI to evaluate the interaction between automated recommender systems and the visibility and discoverability of European works across VOD platform interfaces. Similarly, Article 25 of the DSA, theoretically, could serve as a normative precedent for introducing a new paragraph into Article 13 of the AVMSD, aimed at ensuring the presentation of detailed information regarding the nationality of the works, their production or co-production status and the authorities that funded the works showcased on VOD platforms.

CONCLUSION

This chapter, by reviewing the Union's policies and laws, with a focus on the AVMSD and the DSA, provided a concise analysis of two critical factors that have historically influenced and continue to influence the promotion of competitiveness for the competitiveness of the EFI and European cinematographic works within the digital audiovisual market: the availability of content in the catalogues of VOD platforms and

the visibility and discoverability of such works through the platform interface—while also acknowledging the potential negative impacts of automated recommender systems.

The analysis presented herein demonstrates that the EU policymaker is acutely aware of the promises and perils of digitising the European audiovisual sector, as well as the influence of platformisation on the competitiveness of European cinematographic works. EU policy documents have consistently underscored the impacts of online streaming platforms and automated recommender systems on user experiences and on the capacity and decision-making processes governing access to and exhibition of European cinematographic works. Furthermore, European audiovisual legislation—notably the AVMSD—addresses these issues, and broader legislative instruments, chiefly the DSA, have introduced provisions that may assist the EFI in mitigating the potential detrimental effects of platformisation and automated recommender systems operated by dominant platforms in the global audiovisual market. Nonetheless, this brief overview also highlights the shortcomings of catalogue quotas under the AVMSD and the limited effectiveness of transparency obligations under the DSA, which are driven primarily by consumer protection principles rather than by the promotion of the European audiovisual sector.

In this context, it is imperative to consider the need for further legislative intervention to amend the AVMSD. Specifically, the focus should be on reconstructing the catalogue quotas outlined in Article 13(1) of the Directive. This reconstruction should clarify the concept of the “prominence of European works” and elucidate methods for attaining this objective. It is recommended that EU policymakers and legislators reevaluate the function and practical implications of this concept in relation to the national transposition of Article 13(1) of the AVMSD and address the legal fragmentation across Europe concerning the interaction among catalogue quotas, automated recommender systems, and the prominence of European works. Consequently, it is proposed that, once a clear, precise, and legally binding definition of the “prominence of European works” is established, this principle could serve more effectively as an overarching principle that underpins the catalogue quotas and the transparency measures for the automated recommender systems deployed by global VOD platforms operating in the DSM. This approach would provide EU policymakers and legislators with an opportunity to adapt the provisions related to transparency, as outlined in the DSA, to the audiovisual sector

and VOD platforms by taking into account the metrics identified by the EFI to measure the “prominence” of their works.

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The Role of Investment Obligations for Global Streamers in Enhancing Competitiveness of Small European Markets

Ivana Kostovska

INTRODUCTION

Over the last ten years, the audiovisual industries in Europe have been reshaped by technological and digital innovation. Global streamers like Netflix and Prime Video are influencing local production cultures, effectively importing US-style production norms, practices and storytelling structures across diverse European contexts (Idiz, 2024). Their investments in local content are shaped by economic and cultural conditions, which influence how localisation strategies unfold across European markets (Domazetovikj et al., 2024). Streaming services vary in programming, geography, business models and audience dynamics, challenging policy frameworks to adapt to this complexity (Lobato & Lotz, 2021). Furthermore, SVOD consumption patterns in Europe reveal constraints for competitiveness of European works. European content represents around one quarter of total viewing, while US content captures over

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60% of viewing (Grece & Tran, 2025). Also, US media conglomerates exert a disproportionate influence on the European audiovisual landscape. According to the European Audiovisual Observatory, nine out of ten of the most widespread television and VOD groups operating in Europe are US based (EAO, 2025).

In this context, the European Union is beginning to act as an enabling power for cultural diversity in the international film market (Dâmaso, 2025). Still, as outlined by Vlassis (2021), the balance of power within the international film market is constantly characterised by a strong asymmetry in favour of the United States. The global rollout of US VOD services reproduces this advantage within a recognisable world-cinema hierarchy (Jin, 2017). This invites closer scrutiny of how the EU strengthens its influence in global cultural politics and economy through its audiovisual policy (see also Vlassis, 2021).

Regulating global streaming services, including Netflix, Prime Video and Disney+, as a new area of EU policy intervention is intended to promote European audiovisual works and, through that, to advance cultural diversity. Policy intervention targeting large video-on-demand (VOD) services to support the production and circulation of European works falls under the EU's Audiovisual Media Services Directive (AVMSD), which coordinates national rules on audiovisual media. The AVMSD provides EU Member States with the legal basis to impose financial obligations on video-on-demand (VOD) services, requiring them to invest a portion of their local revenue in domestic content or national film funds. Under Article 13(2) of the AVMSD, Member States may oblige VOD services to channel part of their turnover generated within national markets either into direct investment in local works or into contributions to national policy support schemes. As part of the implementation of the 2018 AVMSD (Directive (EU) 2018/1808), several EU countries have introduced investment requirements targeting global VOD services, including Netflix, Prime Video and Disney+, to support local content creation. These obligations have been adapted to fit different national regulatory environments, policy approaches and market dynamics (Kostovska et al., 2020; Vlassis, 2023a). Under the AVMSD, EU Member States are also required to ensure that VOD services offer at least 30% European content in their catalogues and promote that content visibly on their platforms. Some countries have implemented stricter requirements or have introduced reporting obligations to monitor compliance.

US President Donald Trump's framing of the EU's streamer policy as discriminatory towards US companies and linking it to potential tariff action shows that streamer regulation now plays a significant role in shaping relations among global actors.

The EU regulation of global streamers has also served as a reference point in policy deliberations in English-speaking territories like Australia and Canada (see Canadian Radio-television and Telecommunications Commission, [n.d.](#); Screen Producers Australia, [2022](#)). Both Australia and Canada are advancing towards regulatory frameworks that position global streamers as active contributors to national cultural ecosystems. In Australia, there has been an early-stage proposal for a two-tier system of investment obligations requiring major SVOD providers to report their investments in new Australian content to the Australian Communications and Media Authority to meet a minimum expenditure threshold. Australia's Streaming Services Reporting and Investment Scheme proposed that major streamers invest 5% of their Australian revenue in new local content, which the Australian Screen Industry Group criticised as too weak while urging 20% and warning against delays (see also Vlassis, [2023b](#)). Since 2021, large SVOD providers have voluntarily disclosed their spending on Australian programmes. Data for 2023–24 indicates that SVOD providers have already voluntarily invested AUD 341 million in Australian programming, reflecting growing industry engagement (ACMA, [2024](#)). Canada's Online Streaming Act (Bill C-11), which received Royal Assent in April 2023, enables the Canadian Radio-television and Telecommunications Commission (CRTC) to impose contribution requirements on streaming services. Starting in the 2024–25 broadcast year, platforms with annual revenues exceeding CAD 25 million and without affiliation to Canadian broadcasters must contribute 5% of those revenues towards Canadian and Indigenous programming. This includes allocations to the Canada Media Fund, local news, Indigenous content and programming for equity-seeking communities (Canadian Radio-television and Telecommunications Commission, [2024](#)).

This chapter focuses on analysing how policies for regulating streamers are taking shape in smaller European markets (Flanders-Belgium, Portugal, Croatia and Denmark), by comparing these interventions with those developed in large European markets (France, Germany and Italy). The objective is to explore the role of investment obligations and quota rules for streaming services as part of EU Member States' policy strategies and their implications for EU's status of international film enabler. While

the early models of investment obligations in major European producing countries are well documented in the literature (e.g. D'Arma & Gangemi, 2021; Kostovska et al., 2020), the policy instruments developed in smaller markets have received comparatively less scholarly attention. If cultural diversity is the normative anchor, promoting European works from small EU markets is important to preserve European plurality and to carry it into global flows.

To comprehend the effects of streamers' investment obligations on supporting local film and audiovisual production and circulation of European works from small markets, the research presented in this chapter relies on a combination of document analysis and interviews with policy and industry stakeholders, such as screen agencies, regulators, film producers in Flanders-Belgium, Portugal, Croatia and Denmark. The dataset comprises 12 online semi-structured interviews. Complementing this, the study analyses 42 documents, including legal texts and reports issued by regulators and screen agencies as well as other policy materials, to triangulate interview insights and verify rules, enforcement mechanisms and reported outcomes. The focus is on whether and how their policymakers and industries can use such measures as part of their strategies, influence the global film industry and reduce their peripheral status compared to larger markets like France, Germany and Italy.

Flanders (Belgium), Croatia, Denmark and Portugal illustrate the dynamics of small markets' contexts where structural, cultural, historical and political factors combine to shape the audiovisual industries in ways that place them at a relative disadvantage compared to larger European markets (Nielsen et al., 2024; Domazetovikj et al., 2026). These disadvantages manifest through several interconnected dimensions, including limited domestic market size and linguistic reach, dependence on public funding, fragmented production ecosystems and challenges in accessing international distribution and visibility on global streaming services (Domazetovikj et al., 2024; Kostovska, 2025). The small-market sample includes Flanders (Belgium), Portugal and Croatia as early adopters of investment obligations, with Denmark added as a recent implementer. Theoretically, this chapter contributes to the scholarly discussion on smaller and peripheral markets in media industry studies, by looking at whether investment obligations in Flanders-Belgium, Portugal, Croatia and Denmark may contribute effectively towards creating more competitive audiovisual industries.

INVESTMENT OBLIGATIONS AS EXCEPTION TO THE COUNTRY-OF-ORIGIN PRINCIPLE

The investment obligations for video-on-demand (VOD) services as a policy tool under the AVMSD constitute an exception to the country-of-origin principle, which has long been a cornerstone of the internal market for audiovisual services. In implementing investment obligations under the AVMSD, Member States may target both domestic and foreign on-demand audiovisual media service providers that are directed at their national market. Traditionally, the country-of-origin principle ensures that audiovisual media service providers are subject only to the regulatory framework of the Member State in which they are established, even when their services are accessible in other Member States.

The inclusion of Article 13(2) in the 2018 AVMSD reflects the recognition that the rapid expansion of cross-border VOD services has disrupted the balance in support of European works. In the absence of such a provision, providers established in one Member State deriving significant income from audiences in another could operate without making any financial contribution to the creation of local or European works in those markets. This situation would allow them to compete on unequal terms with domestic players, who are frequently bound by national investment requirements, thereby undermining market fairness and the sustainability of local production ecosystems.

While a key policy rationale for imposing investment obligations is to place global VOD services and domestic broadcasters on a more equal competitive footing, the wider policy objective includes enhancing cultural diversity, the cultivation of home-grown talent and the strengthening of the economic sustainability of local audiovisual production (Kostovska et al., 2020). The policy objectives of Article 13(2) extend beyond correcting market asymmetries between domestic broadcasters and VOD services. As outlined in both EU policy discourse and academic research (see Kostovska et al., 2020), investment obligations are also intended to enhance cultural diversity, provide international visibility of local production and improve the financial support for local audiovisual works. In practice, they seek to align the operations of global VOD services with broader cultural policy goals, integrating them into Europe's diverse production ecologies.

The implementation of these policies across the EU demonstrates their growing importance. Nearly half of the Member States have adopted or

are in the process of adopting investment requirements targeting VOD services. While some countries are introducing such measures for the first time, others are significantly updating existing frameworks. This trend reflects both the flexibility afforded by the Directive and a shared determination among Member States to ensure that global streaming services contribute fairly to the support of European works.

It follows that these measures have also been tested in court. In 2018, Netflix challenged Germany's requirement to contribute to domestic film funding, arguing that the country-of-origin principle should exempt it from such obligations. The General Court, however, declared the case inadmissible (Case T-818/16), affirming that Germany's scheme did not breach EU law and fell outside the scope of state aid rules. More recently, Netflix contested the French-speaking Community of Belgium's 2022 reform, which sharply increased investment obligations from 2.2% to a tiered maximum of 9.5% of annual revenues. The company argued before Belgium's Constitutional Court that the measure was disproportionate compared to other EU jurisdictions and risked distorting competition. Taken together, these challenges outline how the proportionality of national obligations under Article 13(2) of the AVMSD remains a contested legal and political issue, testing the boundaries of Member States' regulatory discretion within the EU internal market.

ADOPTING INVESTMENT OBLIGATIONS IN SMALL MARKETS' CONTEXTS

The cases of Flanders, Portugal, Croatia and Denmark illustrate how small markets are situated at different stages of the policy cycle. Flanders, one of the first to legislate investment obligations, has already moved into a phase of regulatory adjustment. Portugal and Croatia followed, whereas Denmark has been the most recent to establish investment obligations. In addition to the four jurisdictions examined here, several other EU countries and regions including Wallonia in Belgium, Greece, the Netherlands, Czechia, Poland and Romania have adopted investment obligations. Among the large audiovisual markets, France, Germany, Italy and Spain have embedded investment obligations in their national policy frameworks.

Flanders, alongside France, Germany and Italy, was among the first EU jurisdictions to introduce regulatory requirements for foreign VOD services, with the Flemish decree entering into force in 2018. It presents

a distinct case among early adopters of investment obligations, owing to its characteristics as a small linguistic market with limited production capacity and export potential, and a modest scale of audiovisual activity. The investment obligations for VOD providers were introduced following public debate on the need to bring non-domestic VOD services whose audience reach in Flanders has grown sharply into existing policy support frameworks. Policymakers argued that, because these services compete directly with incumbent broadcasters already investing in domestic content, they should also contribute to the Flemish production ecosystem (Kostovska et al., 2020).

The resulting regulation, integrated into the Flemish audiovisual policy toolkit, requires foreign VOD services to contribute a portion of their annual turnover generated in Flanders. VOD providers may comply either through direct investment in local production or by making a financial contribution to the film fund VAF. VOD providers can meet their obligation by investing in series as well as films. The design of the measure mirrors pre-existing obligations for distributors, offering a choice between monetary contributions and direct investment. The Flemish government significantly updated its investment obligation for VOD and video-sharing platforms with legislation adopted in 2024 and entering into force on 1 January 2025. Under this reform, the required contribution rate was raised from 2% to between 2 and 4% of annual turnover generated in Flanders, and the scope was broadened to include video-sharing platforms such as TikTok, YouTube and Instagram. The update is expected to double annual audiovisual funding to approximately €7 million. However, the decree has been contested before Belgium's Constitutional Court by Google, Meta and TikTok, which argue that extending such obligations beyond traditional streaming services to general video platforms represents an overreach that risks setting a precedent for wider digital regulation within the EU. Furthermore, the European Commission's comments on the proposal point out a number of potential issues with proportionality and non-discrimination (European Commission, 2023).

The investment obligation policy's integration into the broader policy support system reflects a strategic shift towards integrating global platforms into the Flemish audiovisual model. Its potential lies in leveraging VOD investments to improve the visibility and export prospects of Flemish audiovisual works. In practice, Netflix has fulfilled its Flemish investment obligations through co-production arrangements, with the

most recent cases being *High Tides (Knokke Off)* seasons 2 and 3. According to the interviewed producers, investment obligations not only contribute to the visibility of Flemish productions abroad but also strengthen local financing structures by involving a broader spectrum of commissioners and financiers beyond incumbent stakeholders.

Portugal's transposition of the AVMSD relies on a softer mechanism compared to the one in Flanders (Law No. 74/2020 (19 Nov 2020)). The investment obligation came into force in 2021, reflecting the objective of encouraging the development of the cinema and audiovisual sector in the context of technological evolution regarding the dissemination of audiovisual content. VOD providers are subject to a financial contribution of 1% of their relevant income, with the option to channel funds either as a direct investment in production or as a payment into a national fund. The contribution can take the form of a direct payment to the Institute of Cinema and Audiovisual (ICA) or be fulfilled through financing, co-producing or acquiring the rights to Portuguese works, provided these are carried out with independent producers established in Portugal. The investment may also take the form of promotion of European cinematographic and audiovisual works, by creating an area dedicated to the promotion of European and Portuguese-language works in VOD catalogues. This flexibility is designed to accommodate different service profiles and market positions, and thresholds exist to exempt small operators or niche services with limited revenues or audience share. Also, VOD services may choose to make the investment in two-year cycles. This model balances regulatory impact and industry burden, applying to both domestic and foreign services targeting Portuguese audiences. The regulation of VOD providers also includes a 30% quota obligation for European works in VOD catalogues, including 15% of independent European works. While *Glória*, Netflix's first Portuguese original series, and *Turn of the Tide*, Portuguese drama that premiered in 2023, are clear examples of Netflix investing in Portuguese productions, there is no evidence that these series were directly commissioned as a result of the investment obligation. According to interviewed Portuguese producers, Netflix's engagement with local productions can be directly attributed to the policy framework. In their view, without this obligation, the streamer would have refrained from investing in national content.

Croatia employs a dual-model approach under its 2021 Law on Electronic Media. The legislative framework requires VOD services targeting

Croatian audiences to allocate part of their revenue to domestic audiovisual works. Specifically, 2% of gross annual income generated in Croatia must be invested in the production or acquisition of Croatian audiovisual works from independent producers. In addition to this direct investment obligation, VOD providers must pay a levy (set at 2% of annual gross income) to the Croatian Audiovisual Centre (HAVC) to support the National Program for the Promotion of Audiovisual Works. Comparable obligations apply to domestic operators. Since 2021, the investment obligations have extended to VOD services established in other EU Member States but targeting the Croatian market, including Netflix and Amazon Prime Video. Early projections by the Croatian Audiovisual Centre (HAVC) estimated that the annual contribution from international streaming services under the investment obligation would amount to approximately EUR 615,000 (Kostovska et al., 2022). However, prior research has indicated that the potential of such obligations to address structural film funding challenges in small Central and Eastern European markets, including Croatia, is limited (Kerševan Smokvina, 2021), given the relatively low rate, the option to fulfil obligations through licensing and the absence of provisions supporting under-represented genres. The Croatian system allows carrying forward surplus investments to future fiscal years, offering some flexibility to providers engaging in higher-budget projects. VOD services are also subject to a 30% quota obligation for European works in their catalogues in Croatia, in line with the AVMSD. The regulation also imposes a prominence obligation, requiring that European works be featured on the cover page of the catalogue to ensure their visibility to users.

The analysis confirms that streaming services have participated in the Croatian content ecosystem primarily through licensing, without direct investment in local production. For example, in 2023, Netflix acquired a package of twelve Croatian films, which, according to HAVC, satisfies the streamer's obligation to invest 2% of its Croatian market revenue in the production or acquisition of audiovisual works (Kostovska et al., 2025). The package includes titles such as *Zbornica / The Staffroom* (2021), *Nosila je rubac crleni/Even Pigs Go to Heaven* (2022), the animated feature *Cvrčak i mravica/Cricket & Antoinette* (2023) and the family film *Dnevnik Pauline P. /The Diary of Paulina P.* (2023). Unlike in other small markets, the 2021 Electronic Media Act's investment obligation has not led Netflix to produce original Croatian content. For some interviewed policymakers, this reliance on licensing is an intentional legislative

design to support the reach of national cultural works, deemed richer in cultural value than many globally oriented streamer originals. The underlying rationale is that films produced with public support embody cultural value and, by being made available on VOD platforms, can more effectively reach younger Croatian audiences who increasingly consume content through such services. However, as other policy stakeholders note, the inability of a small market such as Croatia to compel global streamers to invest directly in local productions illustrates the practical limitations of regulatory power in smaller territories.

Denmark's cultural contribution scheme, effective 1 January 2025, sets a mandatory 2% levy on the Danish turnover of on-demand services. Where a streamer's direct investment in Danish audiovisual content falls below 5% of its revenues, a further 3% levy is added, bringing the total obligation to 5%. The scheme is expected to yield 100 million DKK (EUR 13.4 million) annually for the financing of local Danish audiovisual content (Laursen, 2025). Interviewed producers emphasised that the investment obligations for streamers and the national production incentive have the potential to strengthen Denmark's production ecology by supporting the financing of domestic television fiction.

Overall, the cases of Flanders, Portugal, Croatia and Denmark illustrate both the opportunities and limitations of investment obligations as a policy tool for small audiovisual markets. While the design and scope of the measures are different, their common rationale lies in integrating global streamers into national policy support frameworks in order to broaden the financing base for domestic production and enhance the visibility of local audiovisual works. In some small markets, these rules effectively push streamers towards collaborations (through co-production, commissioning, financing) that they would otherwise bypass, allowing local producers to expand their reach and participate in cross-border industrial circuits rather than remaining limited to domestic financing arrangements.

POLICIES IN LARGE EU MARKETS

Larger Member States, with stronger industrial capacity and greater bargaining power, tend to adopt ambitious schemes that combine high contribution rates with detailed sub-quotas and in some cases safeguards for independent production. The weight of large markets is particularly

visible in audience terms, affording them the capacity to pursue regulatory trajectories aimed at strengthening the international circulation of their content. Spain, France and Germany account for 59% of the viewing time of non-national EU works, with Spain representing a particularly significant proportion of this figure for TV series (Grece & Tran, 2025).

France represents one of the most comprehensive regulatory models for investment obligations on global VOD providers, combining a direct investment requirement with a levy to the National Centre for Cinema and the Moving Image (CNC). Strengthened in June 2021 through increased contribution rates, the framework applies both to services established in France and those targeting French audiences from abroad. The VOD providers are required to devote no less than 20% and, in certain cases, up to 25% of their French turnover to the financing of French and European cinematographic and audiovisual works.

The French model is widely referenced internationally¹ for its comprehensive rules that protect independent production and prevent the concentration of contributions in high-budget, commercially oriented genres. Specific safeguards require that three-quarters of contributions support independent film production and two-thirds support independent audiovisual works. VOD providers are prohibited from holding equity stakes, rights or distribution mandates in independent production companies, and exclusive rights are subject to strict time limits, measures intended to preserve the autonomy and asset base of independent producers. Contribution rates are higher when VOD providers seek shorter theatrical-to-online release windows. Alongside the direct investment obligation, France imposes a levy under the General Tax Code. Originally applied to cinemas and distributors, the levy was extended in 2004 to VOD services established in France and, in 2018, to those targeting French audiences from other Member States. The standard rate is 5.15% of turnover, increasing to 15% for certain categories.

¹ For example, the associations representing producers in a statement on the film financing reform in Germany outline that: “crucial to the effectiveness of the investment commitment is a level of 20 percent, comparable to the French model, and the inclusion of a rights retention clause. A “symbolic,” low investment commitment may well have an impact in smaller countries by incentivizing individual top-quality productions in the country. However, for strong production locations such as Germany or France, an effective level is required.” See: <https://www.lobbyregister.bundestag.de/media/00/37/575308/Stellungnahme-Gutachten-SG2503190059.pdf>.

SVOD providers must invest 25% of annual turnover if films are released within 12 months of theatrical debut, otherwise 20%. Transactional Video On Demand (TVOD) and free services allocate 15% to both cinematographic and audiovisual works, with high quotas for works of French original expression. Under Article 28 of Decree No. 2021–793 of 22 June 2021, VOD service catalogues in France must annually comprise at least 60% European works and at least 40% works of French original expression (EOF). These quotas apply separately to long-form cinematographic works and to audiovisual works made available to the public. For audiovisual works, exemptions from the quota may be granted if the provider commits to investing in new EOF audiovisual productions by independent companies. In such cases, the European works quota may be reduced, but not below 50%.

Italy moved to a more flexible approach to regulating global streamers by revising its legislative framework. The Corrective Decree (effective May 2024) reduced the overall investment rate from 20% to 16%, while increasing the sub-quota for Italian original works to 70% of the total. The previous rate of a 20% investment obligation for European works faced criticism from the Council of State for lacking a proportionality analysis. AGCOM similarly advised lowering the rate, citing significantly lower obligations in other EU countries (Bisceglia & Foco, 2024). With the Corrective Decree, the explicit requirement that the VOD investment obligation must be channelled into independent productions has been removed. The obligation allows for flexibility in the form of contributions, which may include direct production, commissioning, co-production, pre-licensing or licensing arrangements. Expenditure on producing Italian-language versions of European works, as well as promotion and distribution costs, may also be counted towards compliance, provided that contracts include reward mechanisms granting producers a share in the commercial performance of the work.

Relative to France and Italy, Germany retains a light-touch framework. Policymakers are considering introducing a direct investment obligation for streaming services, alongside an existing levy model. Embedded within a broader media reform (including tax incentives and subsidy reforms), the proposed obligation could require VOD providers to reinvest up to 20% of revenues into European content. However, the details are still under negotiation. Germany's audiovisual funding currently relies on a levy-based system set on VOD and other providers at 1.8–2.5% depending on size and paid into the national film fund.

CHALLENGES RELATED TO REGULATING GLOBAL STREAMERS IN SMALL MARKETS

The EU cannot credibly act as an enabling actor for cultural diversity in the international film market unless it creates policy conditions that advance the production and distribution of European works originating in small markets. As small markets carry much of Europe's linguistic plurality, sustained support for the production and transnational circulation of their works through investment and quota obligations is pivotal to cultural diversity. Without such support, supranational framing of "European works" may effectively mean works from the EU big markets (see also Bergfelder, 2005 on supranational framing of "European cinema").

There are persistent challenges to achieving this objective. First, reflecting on the challenges of policy implementation, interviewed policy stakeholders acknowledged that investment obligations in smaller European territories tend to be set at lower rates than those imposed in larger European markets such as France and Italy. The instrument design of investment obligations in small markets tends to be more flexible than in large markets, providing global streaming services with greater leeway in how they comply. Whereas major audiovisual markets such as France or Italy impose high contribution rates, detailed sub-quotas and strict protections for independent producers, smaller markets often have lighter-touch or more adaptable frameworks. Such regulatory choices may limit the obligations' capacity to drive systemic change in local production ecologies and enhance competitiveness. Larger markets often justify their policy schemes through a mix of cultural protectionism and competitiveness objectives, seeking both to defend national industries and to reinforce their international export potential. In small markets, policy objectives on investment obligations are framed more around sustainability, visibility and the integration of foreign capital into fragile production ecosystems, which depend on broader policy support to remain viable.

Although requiring global streamers to support works from small markets in principle advances the diversity of European works, low investment rates and the absence of diversity criteria limit the effect. From an EU policy perspective, this divergence is challenging because it fragments the objectives the Union seeks to advance through the AVMSD. High-rate, prescriptive models in large markets tend to attract a disproportionate share of global streamers' capital.

While small European markets share structural vulnerabilities such as limited audience size, fragmented linguistic communities and constrained production capacity, it is important to outline that not all small markets are the same. Their regulatory choices and ability to capitalise on investment obligations vary considerably depending on industrial maturity, policy traditions and political bargaining power. For example, the regime developed in Flanders is relatively sophisticated, incorporating sub-quotas on genres. In addition, Flanders has broadened the reach of its regulation to cover global platforms operating outside the traditional VOD sphere. Portugal and Croatia have opted for more modest investment obligations. Portugal relies on a lower contribution rate combined with targeted incentives to attract global streamers' investments, whereas Croatia employs a dual model of levy and investment obligations but has struggled to translate these measures into Netflix originals, illustrating weaker industrial leverage. Denmark has implemented one of the more ambitious schemes, building on its established tradition of TV drama production to strengthen its bargaining position with global streamers.

A second challenge is that the politics of industry lobbying complicate implementation across some small jurisdictions, such as Croatia (Kostovska et al., 2025). Global VOD providers generally favour direct investment obligations over levies, as these provide greater control over projects and rights. They also advocate for multi-year commitments and flexible arrangements, which can dilute the redistributive and protective functions that smaller markets seek to achieve through regulation.

A third challenge for small markets is that policy designs in large markets mandate high spending on domestically originated works rather than for European works. Such policy designs skew the geography of reinvestment towards already capitalised hubs and may weaken the objective of promoting diversity across Member States. Italy's increase of the domestic share to 70% is a clear example.

DISCUSSION AND CONCLUSIONS

The European audiovisual policy has long navigated a delicate balance between advancing internal-market integration and safeguarding national culture (Craufurd-Smith, 2004). The balance is most fragile in smaller production ecologies, where local audiovisual works remain central to linguistic and cultural diversity, while scale limits export capacities and

bargaining power with global streamers. In this context, cultural policies in small markets do not merely safeguard domestic industries but also contribute to the overall competitiveness and cultural diversity of European works. Realising the EU's role as a global actor and enabler of cultural diversity-oriented policies requires a coherent policy framework guaranteeing both production support and cross-border visibility for European works from small markets.

The “Brussels effect” (Bradford, 2020) shows how enforceable EU norms on investment and quotas can diffuse globally, shaping policy designs for protecting cultural diversity (Dâmaso, 2025; Vlassis, 2023a). Investment obligations and catalogue quotas under the EU's AVMSD can translate high-level commitments to cultural diversity into enforceable obligations for global streamers that target European audiences. These policy interventions can serve as instruments of advancing a plural cultural sphere consonant with the EU's identity claims (see also Dâmaso, 2025). Obligations channel private investment into local productions and open transnational circulation pathways via global catalogues. Yet platformisation re-orders the terms of visibility and value (Evens & Donders, 2018; Nieborg & Poell, 2018). Discoverability and recommendation systems operationalise commercial logics that tend to privilege high-budget, globally recognisable content. As outlined by Chalaby (2025), Europe's lack of its own large-scale streaming services has created structural dependence on American platforms to distribute European culture abroad.

Although inclusion in global catalogues raises the prospect of expanded reach, the actual visibility of small-market works is mediated by the commercial logics of streaming services. While regulatory measures oblige them to support local content, it is still the global streamers themselves that determine the types of audiovisual productions they are willing to finance. Recommendation algorithms, interface design, and promotional strategies implemented by global streamers often reflect commercial priorities that favour high-budget, internationally recognisable content. Moreover, while regulators can mandate investment, it is ultimately the platforms as distributors that determine how and to whom the content is made visible. This dynamic can generate dependencies, raising concerns about the sustainability and competitiveness of local production of European works. Domestic productions from small markets, even when financed under investment obligations, often occupy marginal positions within catalogues, limiting their discoverability and weakening the intended policy effect.

The policy landscape across the EU reveals varying levels of ambition in implementing Article 13(2) of the AVMSD, with some jurisdictions opting for cautious, low-rate investment obligations, and others adopting far more expansive frameworks with higher rates. The adoption of investment obligations in small European markets such as Flanders, Portugal, Croatia and Denmark, as discussed in this chapter, reflects a distinct regulatory logic compared to the frameworks found in large economies like France, Germany and Italy. In small markets, investment obligations tend to be modest in rate, flexible in compliance and closely integrated into existing funding mechanisms. The four systems of investment obligations apply relatively low rates compared to large EU markets. This design recognises the limited production capacity, small audience bases and restricted export potential characteristic of these markets. Such measures aim less at scaling production for enhancing competitiveness of domestic audiovisual production and more at ensuring a baseline of support for domestic content ecosystems, while avoiding excessive burdens on services that may otherwise reduce their local offerings or withdraw from the market.

The divergence between small and large markets reflects not only differences in market scale and production capacity, but also in policy ambition. In particular, small markets primarily seek to secure the modest growth of domestic industries in a globalised distribution environment, whereas large markets leverage investment obligations as tools for enhancing competitiveness. From a strategic perspective, small-market policies focus on sustaining fragile creative ecosystems and ensuring visibility of domestic content in VOD catalogues, often accepting licensing as a legitimate pathway to compliance. In contrast, policy frameworks in large markets are designed to maximise scale of production, support industrial competitiveness and expand exports, while also defining diversity criteria on how investments are made.

Investment obligations, when transposed into small audiovisual markets, still have the potential to enhance the competitiveness of domestic content. By requiring global streaming services to contribute financially to local production, these measures ensure that at least some proportion of the VOD's resources is channelled into national industries that otherwise struggle to attract such scale of investment. The advantage lies in the potential circulation of supported titles on streaming services. Works produced or acquired under these obligations do not remain confined to the domestic market and enter transnational circulation,

opening opportunities for small-market productions to access international audiences. In this way, investment obligations not only alleviate structural funding gaps but also open possibilities for greater international visibility and cultural exchange, with the potential to enhance both industrial resilience and soft power. Overall, these shortcomings point to the importance of designing regulatory frameworks in which investment obligations, quotas and prominence rules are in synergy (see also Lobato & Scarlata, 2022). Quotas secure a space for European works within globalised catalogues, investment obligations provide the financial means, and prominence measures enhance their discoverability. In small markets, the absence of strong connections between these instruments limits their overall effectiveness. Coherent and well-aligned designs contribute directly to competitiveness and international circulation, whereas fragmented frameworks with weak links to prominence and independence yield only incremental results.

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CHAPTER 4

Promotion of the European Film Industry Abroad: International Public Practices in France and Spain

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INTRODUCTION

The chapter addresses public practices in two European Union (EU) Member States, France and Spain, towards the international promotion of their national film industries and, by extension, the broader European film industry. That is, it focuses on institutional efforts made to promote national film industries in countries outside the country of origin of a film, namely across EU Member States and beyond the borders of the EU (Hoefert de Turégano, 2006). As the analysis will reveal, France has an extensive number of initiatives with this goal, which makes it a relevant case study (Kessler, 2020). To strengthen the external validity of findings,

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the article compares it against Spain, a relevant case study due to the dynamic national film industry and the number of actors at the subnational level that can be involved in international promotional efforts. The two countries chosen display similarities in terms of the size of their film markets and film production capacities but also differences in terms of priority external markets and support regimes for the film sector—that is, countries with centralised and less centralised support models. Furthermore, Spanish efforts face the challenge of articulating the multicultural and plurinational character of the state in a common foreign policy strategy (Martín Zamorano & Rius-Ulldemoins, 2016). Cultural policies of France and Spain have been compared before (Bonet & Negrier, 2011), but the international dimension of their policies remain poorly explored. As will be seen, these features enrich the analysis—namely, by highlighting that, despite the fact States remain the main actors for the promotion of their film industries, this common stance reflects different rationales across the two case studies. Additionally, the article explores how national institutional practices contribute to the promotion of the European film industry across EU Member States and internationally and it analyses how national authorities deal with the involvement of the EU in audiovisual relations, also taking into account their responses to Video-on-Demand (VOD) platforms. As such, the chapter examines to what extent national policy practices are in conflict or in policy symbiosis with the EU’s audiovisual-film action and with the dominant presence of global VOD platforms in the European audiovisual economy.

The empirical analysis developed in the article addresses a key gap in the literature on the European and national audiovisual policy (Dámaso, 2025), but also in the literature on the links between soft power and cinema (Nye, 2004, 2019). As is well known, public policy in Europe has historically played a central role in shaping the audiovisual industries and the broader media sector. 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 (e.g. Busson et al., 2016; Smith, 2011). These interventions have been integral to audiovisual policy frameworks at both levels (National and European; Calligaro & Vlassis, 2017; Psychogiopoulou, 2012, 2015). However, the ways in which EU Member States seek to promote the film industry abroad and the dynamics between national institutional practices and European policymaking remain highly underexplored. This justifies a careful

examination of the ways in which public authorities contribute to the promotion of national film industries abroad. As such, the chapter valued the inclusion of a qualitative analytical phase, through conducting 17 semi-structured interviews in English, French and Spanish, both in person and online, from September 2023 to November 2024, with producers and other film professionals, representatives from ministries, public film agencies and film industry associations (Vlassis et al., 2025).

The chapter focuses on the following key aspects: firstly, it explores institutional mechanisms and specificities in France and Spain and then it examines bilateral and regional co-production agreements—and their development in response to other policy and industrial priorities—as important examples to promote film industries abroad. Secondly, the article highlights the role of the EU in international film promotion to understand, on the one hand, how EU action has been articulated (or not) with national film diplomacy efforts and, on the other hand, how it has been perceived by the state and other actors involved. Fourthly and finally, focusing on how the various national actors approach VOD platforms, the article explores the institutional promotion of the national/European film industry in the light of the evolving technological context in which the latter is embedded.

INSTITUTIONAL MECHANISMS IN THE PROMOTION OF NATIONAL FILM INDUSTRIES ABROAD

The frameworks governing the international promotion of the national film industry in France and Spain reveal institutional similarities. In each case, the primary responsibility lies with national film agencies: the *Centre national du cinéma et de l'image animée* (in English: National Centre for Cinema and the Moving Image; CNC) in France and the *Instituto de la Cinematografía y de las Artes Audiovisuales* (in English: Institute of Cinematography and Audiovisual Arts; ICAA) in Spain. These institutions serve as central coordinators for the development and implementation of international promotion strategies, reflecting a shared recognition of the strategic importance of cinema as both a cultural and economic asset.

Funded by various sector-specific taxes, the CNC plays a pivotal role in supporting the French film industry across a broad spectrum of activities. In terms of international promotion, the CNC's Directorate of European and International Affairs is responsible for formulating

and implementing policy in five main domains: managing cinematographic and audiovisual co-productions; overseeing international cooperation programmes, including those co-financed with external partners; supporting the export and global dissemination of French audiovisual works—particularly through support for Unifrance; maintaining institutional relations with the EU; and advancing cultural diversity in international negotiations, such as those under the World Trade Organization (WTO).

The *Instituto de la Cinematografía y de las Artes Audiovisuales* (in English: Institute of Cinematography and Audiovisual Arts; ICAA) 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 ascribed 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. 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 provinces. For instance, at the sub-state level, there is legislation designed to support the film industry, including its international dimension (see below).

In the case of France, two other institutions stand out as highly unique across EU Member States: *Attachés audiovisuels* and *Unifrance*. A significant milestone in the institutionalisation of France's film diplomacy was the creation of *attachés audiovisuels* in 1987 (Lecler, 2016). These cultural/film diplomats focus primarily on audiovisual affairs and increasingly include professionals with backgrounds in the private cultural sector (Lecler, 2015). Interviewees highlighted that these attachés operate under the authority of the Institut français though employed and remunerated by the Ministry of Foreign Affairs. As of 2024, the French network abroad includes 64 personnel working in this domain: 37 audiovisual attachés—14 regional and 23 bilateral—and 27 project managers. Together, they cover 117 countries and territories, including regions such as sub-Saharan Africa, the Americas, Southeast Asia, the Balkans and the

Middle East. These officers serve as intermediaries between national institutions and local film stakeholders, offering sector-specific expertise across diverse geopolitical contexts. According to several French interviewees, the primary function of audiovisual attachés is to serve as information relays and advisors. They possess detailed knowledge of local film markets, including box-office trends, distributors, and legal or policy developments in the audiovisual sector (Delestre, 2014). Their role extends beyond promotional activities to include diplomatic functions such as advising on geopolitical sensitivities, monitoring regulatory changes in the audiovisual sector abroad, and facilitating cultural events, including film festivals. In parallel, Unifrance plays a complementary role. Though legally independent, Unifrance receives approximately 90% of its funding from the CNC, with the remaining 10% provided by the Ministry of Foreign Affairs under a performance-based agreement specifying targeted regions and objectives. Unifrance operates as a complementary body to the Institut français, although the two institutions serve specific purposes within the framework of France's international audiovisual engagement. Unifrance adopts a market-oriented approach, focusing on enhancing international market access and the commercial promotion of French audiovisual works. 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. A central component of Unifrance's mission is also economic intelligence. The organisation systematically collects data on international markets and provides this intelligence to French distributors and industry professionals. Its box office data collection plays a crucial role in informing the CNC's automatic support mechanisms. Although Unifrance does not exercise regulatory authority over the film sector, unlike the CNC, it exerts influence through its role in shaping strategic priorities and market positioning via the information it disseminates. Together, Unifrance and the Institut français represent a dual-structure model for France's international audiovisual strategy blending economic objectives with cultural diplomacy in a way that is distinctive both within the EU and in the broader global context (Lombard, 2022). Unifrance has developed its own territorial representation system that complements the work of the French audiovisual attachés. These representatives, known as *chargés de territoire* (territory managers), are responsible for promoting internationally the interests of French audiovisual professionals in specific regions. Additionally, Unifrance maintains three international offices in New York,

Beijing and Seoul, the latter of which also covers Japan and Southeast Asia (Unifrance, 2025).

In Spain, at the sub-state level, Autonomous Communities, including the autonomous cities of Ceuta and Melilla, have broad powers in matters of culture. The involvement of regional governments in the promotion of cinema has been traditionally more substantial in those communities that first obtained administrative autonomy and have their own language¹: Basque Country, Catalonia and Galicia (Newman-Baudais, 2011). 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 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. For example, in 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, responsible for promoting and developing the cultural sector in Catalonia. 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. As per the Basque Country, in terms of internationalisation efforts, the key actor is Zineuskadi, a non-profit organisation established by the Department of Culture and Language Policy and key independent audiovisual producers' associations, EPE-IBAIA and APIKA. 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. Moreover, Film Basque Country was created as a brand to represent all film commissions from the Basque Country abroad

¹ In Spain languages different from Castilian may also be official by virtue of recognition both in the Constitution of 1978 and in the Charters of 6 Autonomous Communities. Such provision has been assumed in the Basque Country with respect to Basque; in Catalonia with respect to Catalan and Occitan/Aranese; in Galicia with respect to Galician; in the Valencian Community, with respect to Valencian; in Navarre, with respect to Basque in a delimited geographical area; and in the Balearic Islands with respect to Catalan. This recognition is a cornerstone of Spanish cultural diversity. For a historical account of cultural policies in Spain, see Rius-Uldemolins and Rubio Arostegui (2016).

and serve as the primary point of contact between private organisations and these institutions. Finally, in Galicia, the Galician Agency for Cultural Industries was established 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.

BILATERAL AND REGIONAL POLICY INITIATIVES FOR INTERNATIONAL PROMOTION

In line with the structural role of the state in the film sector, France and Spain have developed a robust array of policy instruments aiming to strengthen the international promotion of their respective film industries. Among the most illustrative examples of promotion remains the development of co-productions (Cabrera Blázquez et al., 2018; Mitric, 2018, 2025), subject to periodic fluctuations though in the case of Spain over the years (Ciller & Beceiro, 2013, Pérez Morán & Guarinos, 2025).

In France, bilateral co-production agreements have historically been a cornerstone of international film strategy (Hammett-Jamart, 2018). These agreements enabled the mutual recognition of national status for co-produced films, allowing them access to domestic funding and market protections. Films recognised under these treaties benefit from eligibility for national funding schemes in each partner country and enjoy access to France's substantial array of subsidies (Cabrera Blázquez et al., 2018). These arrangements are particularly beneficial for emerging film industries, which might lack the financial infrastructure to support large-scale productions independently. Co-production agreements constitute a fundamental component of France's national film policy, underscoring its strategic objective to both cultivate a robust domestic film industry and enhance its global cultural presence. Notably, as of February 2024, France had entered into 61 bilateral co-production agreements, significantly exceeding the corresponding figures for Germany (27), Spain (24), Denmark (9) and Finland (3), thereby illustrating France's priority in film cooperation. Among the 61 bilateral co-production agreements, 35 are with European countries, 6 with South American nations, 5 each in sub-Saharan Africa and Asia, 4 in North Africa, and 2 agreements respectively in North America, Central America, the Middle East and Oceania (CNC,

2024a). Besides, in 2023, 40.3% of the films approved by the CNC were co-productions (CNC, 2024b). Given that France holds the position of the leading film co-producer in Europe, the international promotion of French cinema carries significant implications for the broader visibility of the European film industry.

Moreover, new co-production treaties are contingent upon the partner state being a Party to the 2005 UNESCO Convention on Diversity of Cultural Expressions and to its legal framework. In addition, such countries must demonstrate a commitment to preserving cultural diversity in WTO negotiations and resist liberalising their audiovisual sectors under a free-market approach. For instance, this policy stance explains why France has not yet signed a bilateral film co-production agreement with Japan. Reciprocal legislative frameworks for co-productions are also a necessary precondition. In France, interviews with key stakeholders reveal that the degree of institutional support may vary depending on the language of the film, with a marked preference for French-language productions. However, stakeholders also acknowledge that co-productions alone are insufficient to guarantee market success. In many cases, additional support from the CNC or the audiovisual attachés is required to facilitate industry networking, raise awareness of existing agreements and enable distribution. In line with France's broader cultural diplomacy strategy, the *Aide aux Cinémas du Monde* (ACM) programme was established in 2012. Co-managed by the CNC and the *Institut français*, ACM is a selective fund designed to foster international co-productions. The majority of funded projects originate from countries that already have bilateral co-production agreements with France (Viñuela, 2018). To date, ACM has supported more than 600 projects, averaging 50–60 per year (Institut français, 2025a). By co-financing international projects, French authorities have sought not only to strengthen France's role in global film networks but also to export the institutional model of co-production as the latter is embedded in professional practices and national public policy (Pomp, 2020; Viñuela, 2018).

Spain has bilateral co-production agreements with 24 countries worldwide, 18 of which are outside the EU. Out of those, since Spain signed the Latin American Film Co-Production Treaty, it has established ten agreements with Latin American countries: Argentina, Brazil, Chile, Cuba, Mexico, Paraguay, Puerto Rico, the Dominican Republic, Uruguay and Venezuela. In addition, 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.). Co-productions recognised by the ICAA can benefit from financial aid for creation, production and promotion, as well as tax deductions for investment in film and audiovisual productions. 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 since 2012, fostering business connections between audiovisual industry professionals from both regions. Other initiatives include the Málaga Festival Fund and Co-production Event, which supports the growth of innovative Ibero-American cinema. A co-production and business forum specific to the Animation industry is also available at the Quirino Awards, aiming to connect companies to co-produce, co-develop and work at the Ibero-American level. 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.

In addition, since the mid-1990s, the Ibermedia Programme has been a long-standing pan-regional initiative, supporting 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.). The initiative 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 (Gonzalez, 2020).

Despite differences in terms of geographical priorities, the co-production support policies adopted by both countries demonstrate a convergence of strategic objectives aimed at enhancing the international visibility of their national film industries and, by extension, of the broader European film industry. In Europe, these co-production agreements are a key part of the policy architecture of EU MS towards the development

of the film industry and function as economic, cultural and diplomatic instruments, enabling increased production capacities, narrative diversification and expanded access to global markets (Mitric, 2025).

THE EUROPEAN UNION AND THE PROMOTION OF FILM INDUSTRIES ABROAD

Initially, culture was excluded from the 1957 Treaty of Rome, as it was seen as the domain of organisations like the Council of Europe or UNESCO. Since the inclusion of Article 128 in the Maastricht Treaty—renamed Article 167 in the Treaty on the Functioning of the European Union (TFEU)—culture has become an integral domain of EU policy-making (Council of the European Union, 2004; European Commission, 2016; European Parliament et al., 2017; Higgott and Lamonica, 2021). The Treaty of Lisbon slightly expanded the EU's role, though cultural policy remains a “supporting competence”, meaning that the EU may complement but not replace national efforts (de Vinck, 2014; Pauwels, 2014). Within this framework, the EU has embraced a dual approach to cultural policy: promoting both industrial competitiveness and cultural diversity (Dámaso & Murray, 2021; de Vinck, 2014; Jäckel, 2007; Psychogiopoulou et al., 2024).

The national authorities of the countries under study expressed a nuanced perspective regarding the role of the EU in the international promotion of the national film industry. All interviewees acknowledged the existence of shared values across film industries in Europe—such as the promotion of cultural diversity and the defence of artistic freedom. In their view, the EU's support has significantly contributed to reinforce national film ecosystems and their collaboration, enabling the production of more competitive films and fostering film cooperation across EU MS. In particular, interviewees consider that the MEDIA programme has had a significant impact on national industries, including those of France and Spain. Interviewees across the two countries acknowledged the transformative role the programme has played in internationalising national film production.

Besides, several international initiatives from Unifrance and CNC are funded by the EU and the programme MEDIA, such as DEENTAL-ACP Bonus, Aid to world cinema distribution and MyMetaStories. In addition, initiatives such as the Spain Audiovisual Hub of Europe or the former ICEX's Spain Audiovisual Bureau were made possible due to European

funds and have been crucial in further developing and promoting the Spanish audiovisual sector internationally (for further details see García Leiva, 2024; Gobierno de España, 2024). It is therefore not surprising that all experts interviewed emphasised the critical role of the EU's support for the Spanish and French film industries.

Spanish interviewees 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 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. While Spain has made progress in aligning with EU efforts, it was highlighted that there is room for improvement, particularly in fostering collaboration between Spanish institutions and their counterparts in other countries.

Beyond MEDIA, the EU supports several initiatives aimed at enhancing the global visibility of European cinema. One such programme is *European Film Promotion* (EFP), a network of 36 national film promotion public agencies, such as the Danish film institute, the Finnish Film Foundation and Unifrance (European Film Promotion, 2023b). Created in 1997, the goal of EFP is to support the European film industry by increasing the visibility of European films at an international level and support the development of filmmaking talents. To this end, EFP organises marketing campaigns, facilitates networking and supports European delegations at major international festivals (European Film Promotion, 2023a; Hoefert de Turégano, 2006). Some interviewees highlighted the value of the EFP, particularly in markets outside Europe—such as the United States and South Korea—where smaller national cinemas often struggle to gain visibility independently.

The EU also supports EUNIC, a network promoting cultural relations with the EU across the globe (Henze and Wolfram, 2014). EUNIC is composed of different national institutes or national ministries having the promotion of culture in their attributions, such as the Goethe-Institut, the Instituto Cervantes, the Danish Cultural Institute, the Finnish Cultural and Academic Institutes or the French Ministry of Foreign Affairs and Europe. The network is represented in 108 countries with 140 clusters, which are created when at least 3 EUNIC members are present in the country. EUNIC is funded by membership fees from each partner as

well as a contribution from Creative Europe. The *European Film Festival* initiative was launched in 2018 and coordinated by a consortium led by the Goethe-Institut and including the *Institut français* and Cineuropa. It supports the EUNIC network in organising European film festivals worldwide. It has a budget of approximately €1 million annually and involves 76 EU delegations (Cineuropa, 2024; Institut français, 2025b). Support provided by the *European Film Festival* also includes non-commercial broadcasting rights, subtitles, training and technical assistance.

Public authorities in France and Spain have a role in key decision-making bodies of European institutions, as members of the management committee of the Creative Europe Programme, the Board of Directors of the Eurimages Fund and the Board of the EFP network. They are 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.

As previously mentioned, another key focus identified by interviewees in France and Spain was the prominence of film co-productions at the European level. France and Spain actively support this model through agreements and are currently involved in the negotiations for a European agreement on 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 principles among Member States.

In addition, while the idea of a unified “European cinema” identity has gained some attention, scepticism persists regarding the practicality and desirability of such an approach. On the one hand, interviewees stressed the diversity and plurality inherent in the continent’s film industries. Stakeholders highlighted that European cinema exists alongside multiple national cinemas, each with its own identity, aesthetic approach and cultural sensibility. Several interviewees noted that certain cinematic movements had historically reinforced the idea of the filmmaker as the primary creative authority, fostering a tradition of author-driven filmmaking characterised by creative storytelling, social engagement and experimentation. This emphasis on creative authorship and thematic depth is widely seen as a defining feature of European cinema, distinguishing it from more commercially driven industries. The cultural, political and collaborative dimensions of European cinema were also

pointed out by participants, who emphasised its role as a medium for cross-national dialogue and the construction of a shared European identity.

On the other hand, in discussions around international promotion, questions were raised about whether the EU should take on a more prominent role than it currently does. These concerns reflect broader doubts about the effectiveness of a centralised EU promotional body, in both symbolic and pragmatic terms. French stakeholders highlighted that France benefits from a robust system of public financing and promotional mechanisms, making centralised EU intervention seem unnecessary from their perspective. According to this view, a pan-European cinema brand could undermine the distinctiveness of French cinema, which has long been associated with a strong national identity and cultural heritage. Moreover, concerns were raised about the potential erosion of national sovereignty in audiovisual policymaking—particularly in areas like co-production agreements and international promotional strategies. French representatives stressed the importance of maintaining control over these domains, emphasising the extensive resources already allocated by the French state towards cultural diplomacy and film promotion. They argued that rather than replacing national efforts, EU-level initiatives should aim to complement them.

Overall, stakeholders stressed that the EU-level initiatives should complement rather than replacing national cinema policies, allowing each country to maintain its distinctive cultural voice while engaging in collaborative and transnational projects. These perspectives reflect a cautious approach towards further EU integration in film promotion abroad. While European cooperation is valued—especially for funding, training and market development—there is strong support for preserving national control over film branding and diplomacy.

THE PERCEIVED ROLE OF GLOBAL VOD PLATFORMS IN THE INTERNATIONAL FILM PROMOTION

The proliferation of US-based global VOD platforms such as Netflix, Prime Video and Disney+, alongside the disruptions caused by the COVID-19 pandemic on cinema admissions (Vlassis, 2023), has significantly transformed the global film industry. This transformation has sparked divergent perspectives regarding the role of VOD platforms in promoting national and European film industry.

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 three-fold since 2019 with revenues increasing from €376 million to €1,084 billion in 2022 (PwC, 2024). 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. Spain has secured a notably higher share of global streaming platforms' investments in original European content (37% in 2021 compared to 12% for France), partly due to its capacity to cater to the Latin American market (Lacourt, et al., 2023). Besides, in France, between 2021 and 2023, these investments surpassed €974.6 million, with Netflix, Amazon Prime Video and Disney+ accounting for €866 million of that total (Boxoffice Pro, 2024; Goodfellow, 2024). This is clearly shown by both countries ranking as the largest exporters of films on VOD within Europe, first France and second Spain (Grece, 2022). According to Parrot Analytics (2024), many of Spanish 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.

Many interviewees have highlighted that VOD streaming services certainly represent a key opportunity to promote the Spanish and French, and by extension 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. In France, public institutions, including the Ministry of Foreign Affairs, regard VOD platforms as strategic instruments for expanding the reach of French cinema to global audiences. These platforms are considered particularly advantageous for the dissemination of heritage films and documentaries, which may not have otherwise found an audience through traditional theatrical distribution. It is worth mentioning here that French "heritage films" are older cinematographic works, generally released in theatres more than 20 years ago, whose distribution and restoration are supported

by institutions such as the CNC. Consequently, VOD services are increasingly seen as vehicles for advancing some of France's cultural diplomacy goals. As one French interviewee stated: "You see the results of heritage films on platforms, for example. These are films that we wouldn't be able to make in cinemas. Platforms have completely revolutionized the economics of heritage films, for example, which used to be negligible. Now it's becoming important. And it's also an opportunity to win over new audiences".

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 in Spain 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 that some efforts have been made to address these issues with the transposition of the Audiovisual Media Services Directive, 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. 116–119).

In addition, on the one hand, several stakeholders mentioned that global streaming platforms now operate with a clear territorial strategy. Apart from negotiating global deals, they are increasingly favouring territory-by-territory agreements, which has led distributors to collaborate with smaller, locally based structures. Another advantage of this model is that agreements for films or series are typically made only when there is a demonstrated audience interest in the specific territory. Consequently, the content catalogues of streaming platforms vary from one territory to another, reflecting local demand and market differentiation. On the other hand, another topic that was brought up by several interviewees was the fact that the global streaming 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, French and by extension European films.

In response to these evolving dynamics, French institutions tasked with promoting national cinema abroad have adopted various strategies for engaging with VOD platforms. Based on interviews with key industry stakeholders, Unifrance, for instance, views VOD services as constituting a secondary, distinct market. Accordingly, its strategic priority remains theatrical distribution, with digital platforms considered a supplementary promotional channel. This approach is predicated on the perception that a film's discoverability on digital platforms is significantly enhanced by the reputation it garners through theatrical exposure. The Institut français, by contrast, has developed its own VOD initiative, *IFcinéma à la carte*, to facilitate broader access to French cinema. This free, non-commercial platform enables a wider distribution of French films through a curated catalogue. According to expert interviews conducted in 2024, the platform provides access to over 3,000 titles, enabling approximately 20,000 screenings annually across 180 countries (IFcinéma, 2025).

CONCLUDING REMARKS

To conclude, France distinguishes itself from its European counterparts through a structured institutional system that relies on the complementary functions of two key entities (Vlassis, 2015): the diplomatic efforts of audiovisual attachés and the sector-specific expertise of Unifrance. This dual framework enhances the strategic reach of French cinema abroad by combining cultural diplomacy with targeted promotional capabilities. This system offers France a comparatively greater capacity for international influence and visibility, a benefit that also extends to several French-European co-productions. 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. 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. 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 focus is mostly in Europe and Latin America.

In addition, the analysis reveals that the authority to establish audiovisual co-production agreements remains a fundamental prerogative of national governments, which have historically been protective of this domain against supranational intervention, particularly from institutions such as the European Commission. This sovereign control over film policy instruments reflects broader concerns regarding the preservation of national (film) identity and state autonomy in the cultural sphere. Notable examples also include the negotiations of the Protocol on Cultural Cooperation between the European Union and South Korea (Vlassis, 2016), and the establishment of the Eurimages co-production fund (Mitric, 2025) under the auspices of the Council of Europe—an intergovernmental organisation. More specifically, France's extensive network of bilateral co-production agreements illustrates its strategic use of international collaboration to bolster both its domestic film industry and global cultural influence. By facilitating access to funding, distribution and institutional support, these agreements—especially with countries sharing France's cultural policy values—enhance the reach and viability of co-produced films. France's leadership in European film production is further reinforced by targeted initiatives like the *Aide aux Cinémas du Monde*, which exemplify the country's commitment to cultural diplomacy and the exportation of its co-production model.

Moreover, in both countries, rather than advocating for a stronger central role for the EU, stakeholders tend to support a model based on complementarity. They argue that European initiatives should enhance, rather than replacing, national strategies. This perspective underscores a broader commitment to preserve cultural sovereignty while still engaging in international collaboration on mutually beneficial terms. Finally, streaming services also emerged as a crucial component in expanding the global presence of French and Spanish film industry, representing a significant opportunity to enhance global reach but also presenting challenges, particularly in terms of visibility for non-mainstream European content. Stakeholders also stressed that while streaming services have opened new avenues for global reach and investment, they also raised important questions about cultural diversity, IP ownership and the future role of public policy in protecting and promoting national and European cinema within a globalised audiovisual media landscape.

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PART II

Framings and Strategies of Film Professionals



Global VOD Platforms, Competitiveness, and European Film Industry: From Academic Literature to Professionals' Views

Marina Rossato Fernandes and Antonios Vlassis

INTRODUCTION

The global expansion of Video-on-Demand (VOD) platforms has transformed the audiovisual sector, reshaping the ways films are produced, distributed, and consumed (Johnson, 2019; Lotz, 2018; Vlassis, 2021a). In Europe, these changes are particularly significant, as they intersect with longstanding national and supranational policy frameworks. The growing influence of global digital players has sparked intense debate about the future of the European film industry (EFI), raising questions about competitiveness, cultural diversity, and the adequacy of existing regulatory models.

Scholarly research has explored multiple dimensions of this transformation, including the ways in which US-based global VOD platforms, such as Netflix, Prime Video, Disney+, influence national production cultures, funding structures, content circulation, and the visibility of

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European works (Idiz, 2024; Iordache, et al. 2022). These studies highlight how the growing influence of VOD platforms, particularly those based in the United States, is reshaping long-standing industry practices and challenging regulatory frameworks. This shift presents significant governance challenges for European policymakers, who must balance the need to promote cultural diversity with the imperative to boost film competitiveness (Vlassis, 2023a; Kalimo & Pauwels, 2009).

A milestone in the EU's regulatory response is the 2018 revision of the Audiovisual Media Services Directive (AVMSD), which extends certain obligations to VOD and aims to ensure a level playing field between traditional and new digital market actors. Among its key provisions are content quotas and investment obligations aimed at supporting the production and circulation of European works (Vlassis, 2021b, 2023b). However, the effectiveness of these measures remains contested. While some scholars argue that investment obligations hold greater transformative potential for the sector (García Leiva & Albornoz, 2020), others suggest that the 30% quota requirement is insufficient to secure meaningful cultural diversity and visibility for European content (Farchy et al., 2021). The Directive's treatment of prominence, intended to ensure that European works are discoverable on VOD platforms, has also drawn criticism, as it remains vaguely defined at the EU level and is implemented unevenly across Member States (García Leiva, 2020).

The policy process that led to the AVMSD revision was marked by competing narratives: while some stakeholders advocated for stronger obligations to protect the EFI based on the need to ensure a level playing field and support cultural diversity, associations representing the digital and telecommunications sectors posed strong opposition, using a consumer choice rationale to resist regulation (Vlassis, 2017, Fernandes et al., 2025).

Although scholarly literature has addressed these structural and policy-level dynamics in detail, far less attention has been given to how film professionals themselves perceive the influence of global VOD platforms and the need for regulatory responses. As the main actors engaging with these platforms, professionals offer essential insights into how the presence of global streamers is reshaping the EFI. Their perspectives are particularly important for understanding whether the presence of VOD is perceived as fostering or hindering the competitiveness of the sector. This chapter addresses this gap by asking: How do European film professionals perceive the impact of US-based VOD platforms on the competitiveness

of the European film industry? More specifically, it examines how professionals assess the challenges and opportunities posed by global streaming platforms, and how they perceive the effectiveness of existing regulatory responses.

To explore these questions, this chapter employs a mixed-method approach, integrating both qualitative and quantitative data. The qualitative strand is based on 37 in-depth semi-structured interviews conducted between January and August 2024. Participants were selected through purposive and snowball sampling to ensure diversity across professional roles, institutional affiliations, and national contexts within the EFI. The interview sample covered eleven categories of stakeholders.¹ This composition ensured a wide range of perspectives across the audio-visual value chain. The quantitative strand draws on a Europe-wide online survey, conducted from late November 2024 to the end of February 2025. Participants were identified through open-access directories such as Cinando and through the professional networks of the research team. More than 3000 invitations were successfully distributed by email, yielding over 400 responses from professionals working in various segments of the EFI.

By triangulating qualitative and quantitative data, the chapter provides a grounded account of how European film professionals perceive the influence of US-based VOD platforms on industry competitiveness and on cross-cutting aspects in the EFI, such as the promotion of cultural diversity in a platform-driven economy. The chapter is structured as follows. It begins by identifying five key areas of concern discussed in the literature: business and policy disruption (Davis & Zboralska, 2019; Anindita, 2021), algorithmic content curation and visibility (Lobato, 2019; Johnson, 2019; Frey, 2021), marketing strategies and audience positioning (Jenner, 2018; Wayne, 2018), data access and asymmetries (Broughton Micova and Jacques, 2020; Idiz et al., 2022), and control

¹ Producers (n=10) (both individual professionals and association representatives), distributors and sales agents (n=4), representatives of public institutions (n=6) (including national film funds and film commissions), exhibitors (n=1) (cinema theatre operators), professionals from VOD services (n=2) and public service broadcasters (n=1), and film festival representatives (n=4) (such as programmers and industry section organisers). It also included authors (n=3) (screenwriters and directors), professionals from public and private promotion bodies (e.g., European Film Promotion) focused on national and European content (n=4), representatives of non-EU trade associations (n=1), and data analysts specialising in market and audience metrics (n=1).

over intellectual property (IP) (Idiz et al., 2022; Lacourt et al., 2023). These thematic areas provide the analytical framework through which the chapter explores how European film professionals perceive such challenges. It finally examines how current EU policy instruments, with a particular focus on the AVMSD, are perceived in relation to these concerns.

FROM ACADEMIC LITERATURE

The expansion of VOD platforms has profoundly reshaped the audiovisual sector, triggering structural and operational transformations across production, distribution, and audience engagement. The academic literature has analysed this process from multiple disciplinary and methodological angles, producing a rich and diverse body of work. Drawing from an extensive literature review, this chapter identifies five key areas of debate that stand out as particularly relevant for understanding the challenges and transformations these platforms pose to the EFI: business and policy disruption; algorithmic content curation and visibility; marketing strategies and audience positioning; data access and asymmetries; and the control over IP. These areas are not isolated; rather, they frequently intersect. However, for methodological purposes, they are presented separately to provide a structured analytical lens.

This selection is not exhaustive but reflects recurrent tensions that structure academic and policy debates, particularly around power asymmetries between global platforms and local players. It also reveals how much of the current literature remains anchored in top-down perspectives, often focused on regulation and market trends, with less attention to bottom-up experiences from industry professionals. Each area identified encompasses a wider range of issues and subtopics; however, the intention here is to provide a structured overview that reflects central academic concerns and offers a meaningful framework for cross-referencing with professionals' perspectives. By using this framework as a lens to interpret professionals' perceptions, the chapter seeks to test the resonance of academic concerns against industry practice and to uncover possible gaps between discursive framings and lived realities within the EFI.

A first area of discussion relates to how VOD platforms have disrupted traditional film and television markets. These services have intensified competition with legacy media actors and introduced new industrial logics. Some authors categorise VOD platforms as disruptive innovations

within the audiovisual sector, particularly in relation to their capacity to displace existing intermediaries and reconfigure market dynamics (Anindita, 2021). Their presence has altered production patterns and financing structures, with effects on commissioning practices and the configuration of audiovisual content (Castro Marino & Cascajosa, 2020; Idiz, 2024). Other studies suggest that the structural reorganisation of industry relations has resulted from the centralisation of power by global platforms and the increasing vertical integration of production and distribution (Davis & Zboralska, 2019).

In the European context, the disruptive impact of VOD platforms must be understood in light of the particular characteristics of the EFI, which is historically shaped by diversity, fragmentation, and the coexistence of multiple linguistic, national, and regional markets. Unlike more centralised industries, the EFI is composed of a patchwork of national production cultures, funding systems, and policy frameworks, many of which rely heavily on public support. This structural diversity, while often celebrated as a strength in terms of cultural richness, also makes the EFI more vulnerable to the concentrated power of transnational digital platforms operating at a global scale (Chalaby, 2025). These developments have raised significant concerns about the sustainability of key institutions within the EFI, particularly public service media (PSM). Traditionally tasked with supporting national content production and ensuring access to culturally relevant programming, PSM now face intensified competitive pressure from global players offering on-demand content across borders and often outside the same regulatory and financial obligations (Doyle, 2023).

A second area widely discussed in the literature concerns algorithmic content curation and its impact on the visibility of audiovisual works. The recommendation systems employed by VOD platforms play a key role in shaping what users are exposed to, thereby influencing access and discoverability. These systems tend to favour specific genres, languages, and production scales, which can marginalise smaller or culturally specific content (Lobato, 2019). This dynamic raises critical concerns about the capacity of European works, especially those produced outside major markets, to reach audiences in the digital environment. Other authors emphasise that the algorithmic basis of these platforms reduces editorial transparency and accountability, raising questions about how cultural works are surfaced and prioritised (Johnson, 2019; Frey, 2021). In

response to such concerns, the AVMSD introduced prominence requirements for European works, aiming to increase their visibility on on-demand services (García Leiva, 2020).

Closely related to visibility is a third area of concern regarding how VOD platforms approach the marketing and positioning of content. Research has shown that these platforms often apply global marketing strategies that do not account for national promotional frameworks or audience specificities. This global orientation reshapes how content is developed, presented, and valued within digital catalogues (Jenner, 2018). Further studies observe that such strategies can contribute to the weakening of local cultural identification and the erosion of traditional national promotional channels (Wayne, 2018). Recent analyses have also highlighted how the marketing strategies of global platforms tend to promote international works over national works, with variation on different platforms (Pedro & Camáñez García, 2024). Together, these dynamics raise important questions about how promotional asymmetries shape the competitive environment for European works and challenge traditional mechanisms of cultural circulation and audience engagement.

A fourth area of debate concerns data access and the resulting asymmetries between VOD platforms and other stakeholders in the sector. The business model of global platforms relies heavily on the collection and analysis of user data, such as viewing habits and engagement metrics. However, access to this information is not extended beyond the platforms themselves, creating significant power imbalances. Producers, distributors, regulators, and scholars remain largely excluded from these data flows, which limits their ability to make evidence-based decisions. Besides, an issue of fragmented information also exists at the level of each platform, as Netflix does not have data about Prime Video, etc. Studies have shown that this lack of transparency undermines the capacity of public authorities to evaluate the performance of audiovisual works, assess cultural impact, and develop effective funding and regulatory mechanisms for the protection and promotion of cultural diversity (Broughton Micova & Jacques, 2020). For industry professionals, the restricted access to viewership data presents multiple challenges. It impairs their ability to understand how audiences engage with their content, hinders strategic planning, and weakens negotiating power when engaging with platforms. As a result, producers and distributors are often compelled to operate within an opaque system in which success is defined by platform-controlled

metrics that are neither standardised nor externally verifiable. This reinforces the dependency of the EFI on global VOD services and diminishes the capacity of independent players to evaluate, adapt, or justify their market strategies (Idiz et al., 2022). Furthermore, these asymmetries raise broader concerns about fairness and accountability in the digital cultural economy, as the control of audience insights becomes a core element of competitive advantage. The issue of data access thus extends beyond business concerns, intersecting with wider debates about governance, cultural diversity, and the democratic oversight of digital infrastructures (Floridi, 2020; Tang & Wei, 2023).

Finally, the control of IP has emerged as a central issue in academic discussions on VOD platforms. The European production model largely relies on public subsidies, co-productions, and the involvement of PSM, with IP retention by producers seen as essential to ensuring reinvestment and long-term sustainability (Hammett-Jamart et al., 2018). Ownership of IP not only ensures continued revenue through licensing and secondary sales but also provides the economic basis for future projects and fosters the long-term development of EFI.

The VOD platforms increasingly operate under models that require full ownership or exclusive long-term rights over commissioned content. This shift significantly alters established financing and distribution mechanisms by converting producers into service providers, rather than rights holders (Idiz et al., 2022). The implications are far-reaching: producers lose access to future exploitation revenues, weaken their bargaining position in future negotiations, and are unable to build capital through a portfolio of IP assets. This dynamic poses critical challenges for the sustainability of the European production model and its ability to compete internationally without becoming structurally dependent on US-based platforms (Lacourt et al., 2023).

Together, these five areas capture key tensions in the evolving relationship between VOD platforms and the EFI. While the academic literature has mapped these issues from regulatory, institutional, and market perspectives, less is known about how they are understood and experienced by film professionals themselves. As the primary actors navigating this rapidly changing environment, professionals offer grounded insights into the practical implications of these shifts. Investigating their views is therefore crucial to bridging the gap between policy debates and industry realities. The following section explores these perspectives through empirical findings from interviews and a Europe-wide survey.

... TO PROFESSIONAL VIEWS

Drawing on the five key areas identified in the literature: industry disruption, algorithmic visibility, marketing strategies, data asymmetries, and IP, this section examines how these issues are perceived by European film professionals. Through the analysis of qualitative and quantitative data, this study aims to assess how research debates are reflected in the discourse and practices of those working within the sector.

First, VOD platforms are widely viewed by professionals as disruptive actors in the audiovisual landscape. However, opinions diverge on whether platforms should be considered as competitors or collaborators (Stephan et al., 2023). Many professionals acknowledge that VOD has created new opportunities, pushing companies to diversify their activities and opening space for new commissioned works. In particular, during the COVID-19 pandemic, VOD platforms were perceived as playing a positive role in sustaining the EFI. As one interviewee summarises, “The streaming platform helped a lot of companies to survive during the pandemic because they were giving jobs, or at least, financing a lot of stuff” (Interviewee 13, Festival). Indeed, the literature recognises this period as one in which VOD platforms significantly reinforced their market position (Vlassis, 2021b) and engaged in initiatives that enhanced their legitimacy among professionals and policymakers (Fernandes & Albornoz, 2023).

Nevertheless, many European film professionals recognise that this “golden phase” has passed. They report that investments from streamers have declined, and a range of structural challenges has emerged. As one producer explains, “they showed us different possibilities, they commissioned many productions from independent producers, but we need to desperately change the way of cooperation because that makes all these small and medium entities empty” (Interviewee 15, Producer). Professionals’ views are shifting from an initial focus on short-term benefits to growing concern over long-term structural impacts, expressing less confidence in VOD platforms as collaborators and more apprehension about their dominant position within the EFI.

Regarding competition for the audience’s attention, a first group describes VOD platforms as competitors for the EFI that directly challenge traditional cinema and television by reshaping audience habits and further fragmenting attention. This perception aligns with growing

concerns about the ability of legacy media to maintain cultural visibility and economic sustainability in a platform-dominated environment (Doyle, 2023). Others, however, argue that streaming complements rather than replaces traditional channels, especially among cinephile audiences: “people who go a lot to the cinema also tend to watch a lot of things on streamers. It’s complementary. People who like films like series. They like watching it on different media. So it’s part of the ecosystem” (Interviewee 6, Exhibitor).

Survey results reinforce the perception of VOD platforms as competitors for audience attention. Among the respondents ($n = 355$), 59,2% identified them as a central obstacle to the EFI’s ability to reach broader audiences. This suggests that, despite more nuanced views in interviews, survey respondents predominantly associate VOD platforms with competitive pressure rather than complementarity (Fig. 5.1).

While professional opinions are nuanced regarding whether VOD platforms compete directly for audience attention, there is far greater consensus on the structural challenges these platforms pose to the competitiveness of the EFI. Their production capacity and vertical integration enable them to produce and distribute content on a global scale,

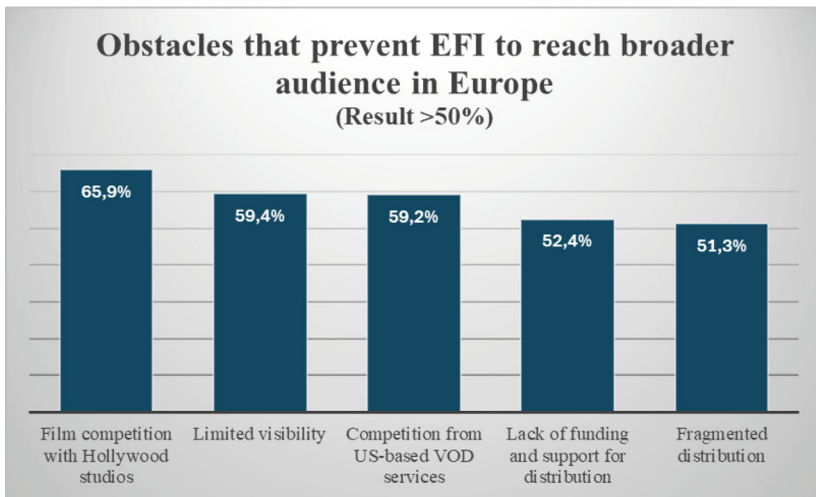


Fig. 5.1 Obstacles that prevent EFI from reaching a broader audience world-wide

making it extremely difficult for European players to compete. The scale of investment available to major VOD platforms is perceived as creating a playing field that most European producers cannot access. As one interviewee explained, “If you compare international TV series, let’s say from Netflix or the Big 5 (Hollywood majors), they put an enormous amount of money into producing those series, which is almost impossible to do with the European system” (Interviewee 1, Promotion).

In particular, global streamers are seen as disrupting the European market by inflating production budgets and concentrating talent. Their ability to offer significantly higher remuneration is perceived as drawing creative and technical professionals away from the independent sector. This trend is seen as hollowing out local ecosystems and weakening the diversity of content produced. As one interviewee put it, “the production boom is sort of sucking resources out of the independent sector and the local sector. So the stories that they would naturally be more empowered to tell are not necessarily being told because the finances and the manpower and the talent are not available” (Interviewee 35, Authors). This reflects a growing concern about how the concentration of resources, in particular in the hands of global platforms, is affecting the content being produced, and how this may, in the long term, limit the creative control of independent producers.

Regarding the second area of debate, although algorithmic and content curation are discussed in academic and policy debates, particularly regarding the visibility of European content, they did not emerge as a primary concern among most interviewees. This suggests that professionals are more focused on the impacts on production. The main exception was PSM, who consistently emphasised the importance of ensuring that public interest content remains easily discoverable. As one interviewee stressed, “The public interest content should be easily identified, properly branded and attributed, and prominent within the algorithm and the recommendation systems” (Interviewee 8, PSB). A distributor also raised the importance of this issue: “However, with the volume, there is a very big need for discoverability and prominence for the European films” (3). Some professionals also acknowledged the competitive advantage of having access to user data and information on recommendation tools to better understand audience preferences. The emphasis, however, is not placed so much on how content is promoted or made visible to audiences through algorithmic curation, but rather on the opacity surrounding how

content performs on VOD platforms, which will be further explored in the section on data access.

The third area of debate, concerning marketing strategies and audience positioning, was not addressed by interviewees specifically in relation to VOD platforms. However, professionals consistently point to significant disparities in promotional budgets when comparing European and US players, which encompass VOD platforms and Hollywood studios. These differences were perceived as directly affecting the competitiveness of the EFI. While marketing was not framed as a central area of concern in isolation, the professionals' remarks suggest that promotional asymmetries form part of a broader ecosystem of unequal resources regarding the US and EFI. In this context, limited marketing capacity constrains the ability of European content to circulate widely, engage international audiences, and compete on equal footing in a global market. Once again, financial disparities were identified as a crucial structural barrier limiting the competitiveness and international presence of the EFI.

There was broad agreement among interviewees that VOD platforms have played a role in increasing the international circulation of European content. Co-productions with US-based VOD were seen as providing access to extensive distribution networks that would otherwise be difficult for European producers to reach. As one interviewee explained:

If you enter into a co-production with a global platform like Netflix or Disney, obviously that content can travel globally through one deal rather than if you're producing the content yourself, [because] then you have to distribute it to lots of different individual broadcasters or content buyers yourself. So I think that kind of changed the dynamic, and that's an advantage that the global streaming platforms have. (Interviewee 8, PSB)

However, professionals also expressed reservations about the implications of this dynamic. While VOD platforms may enable wider reach, the knowledge, tools, and decision-making processes that govern international dissemination remain largely under the control of the platforms themselves. This concentration of power was viewed as limiting the strategic autonomy of European producers and hindering the development of long-term international competitiveness for the EFI. In this sense, global visibility was acknowledged as a benefit, but one that does not necessarily translate into long-term control or capacity-building within EFI.

These findings were also reflected in the survey ($n = 355$), which highlighted both opportunities and limitations associated with VOD platforms. The most positively perceived impact was their ability to engage younger audiences: 58,4% of respondents agreed that US-based VOD services help make content more attractive to this demographic, as illustrated in Fig. 5.2.

However, broader concerns emerged regarding their role within the EFI. A significant majority, 72,4%, perceived that these platforms do not meaningfully contribute to the international competitiveness of the EFI, while 74,8% felt they primarily serve to promote American culture (Fig. 5.3). These results underscore a prevailing concern also evidenced in the interviews that, although VOD platforms enhance accessibility and reach, they remain misaligned with the structural and cultural objectives of the EFI.

The fourth area of debate, centred on data access and asymmetries, emerged as a significant concern among interviewees. Many professionals point to the lack of transparency in viewership data as a significant imbalance in the relationship between global platforms and European stakeholders. Unlike cinema theatres and public service broadcasters, who are subject to longstanding reporting obligations, global streamers are not required to disclose detailed performance metrics. This regulatory gap was described by several interviewees as creating an “uneven playing field,” where the power to evaluate audience impact and market performance remains concentrated within the platforms themselves. As one professional explained, “The transparency of data for us is also really important, because cinemas have to report box office admission numbers across territories. It’s a much more transparent industry” (Interviewee 6, Exhibitor).

Professionals also raised concerns about the broader implications of limited data access, particularly its impact on evidence-based policy-making, an issue acknowledged in the literature (Broughton Micova & Jacques, 2020). Without transparency in viewership metrics, both public institutions and industry stakeholders are left without the necessary tools to evaluate the actual performance, reach, and cultural relevance of audiovisual works. As one interviewee remarked, “I’m going to give you an example, the European Commission telling us it’s all about streaming. That’s what people really like watching and doing. But we don’t have data” (Interviewee 6, Exhibitor).

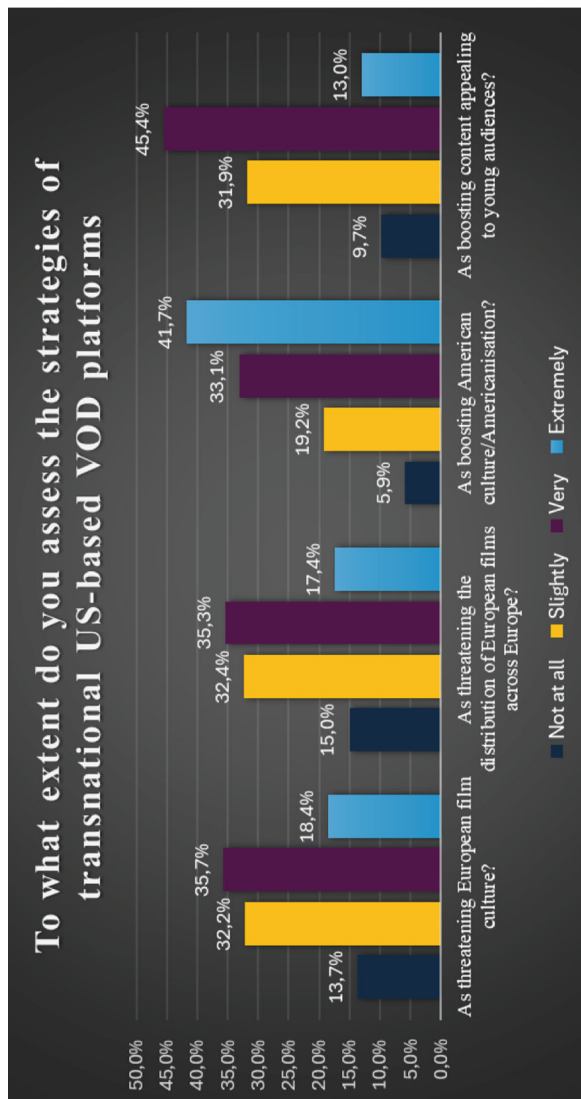


Fig. 5.2 Respondents' perception of the strategies of US-based VOD platforms (I)

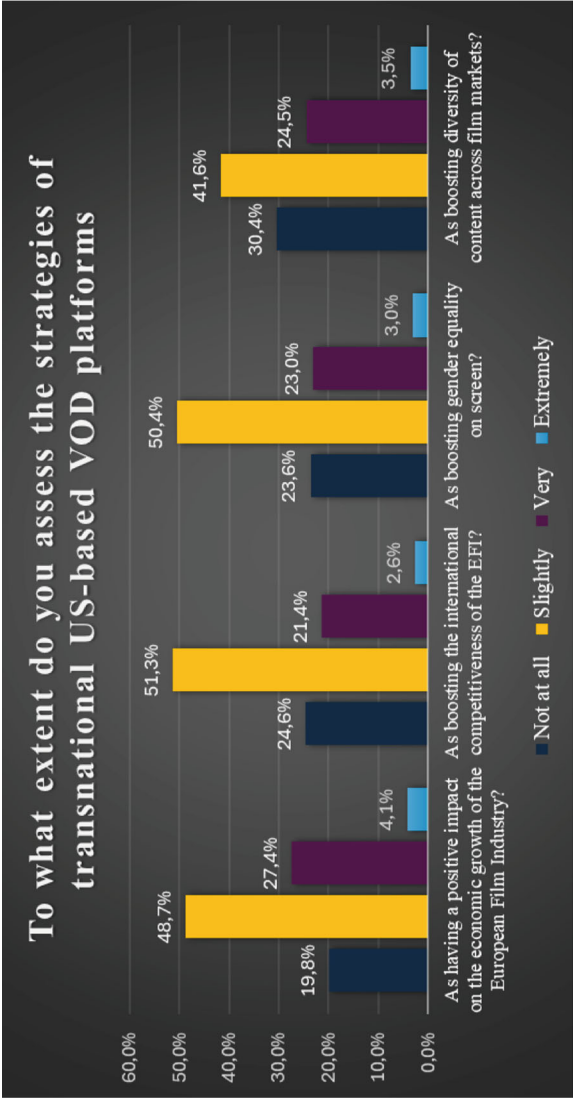


Fig. 5.3 Respondents' perception of the strategies of US-based VOD platforms (II)

Others expressed frustration that recent regulatory efforts had failed to correct this imbalance: “It’s a pity that in the new audiovisual law they are not obliged to because other windows in the industry are obliged to [do it], like the box office and the TV. And they are audited. So that’s not fair at all” (Interviewee 24, Promotion). Beyond regulatory concerns, interviewees also emphasised the strategic advantage global platforms gain from their exclusive access to detailed audience analytics since these data can be used to inform content development, marketing, and user engagement strategies. As such, the platforms’ data dominance reinforces existing market asymmetries, further entrenching their market position.

Finally, the retention of IP was identified by professionals as a crucial factor for the long-term sustainability and autonomy of the EFI. Several interviewees emphasised that when working with global streaming platforms, producers are often required to cede copyright entirely. This model sharply contrasts with traditional co-financing practices in Europe, where producers retain IP and editorial control:

Whenever you work with these global streamers, usually this is a work-for-hire. So it’s an original content, and that means the platform controls the production and holds the copyright. That’s totally different from working with linear broadcasters, they don’t pay 100% of it so the editorial control and the copyright is in the hands of the producer. It’s a big shift because at the end of the day, you’re just doing a service for them... It does not create an industry. (Interviewee 19, Producer)

Beyond creative control, concerns also extended to the economic consequences of these arrangements, particularly the inability to reinvest in future projects. As one professional noted, “They give a small percentage to cover overheads but not to develop further European projects, and to sustain economically independent entities. So the way they try to cooperate with European companies is making us totally dependent in terms of future economic sustainability” (Interviewee 15, Producer). These findings suggest a more nuanced understanding of VOD dynamics than has been identified in previous research (Mitric, 2024). They align with a growing body of literature that sees the platform-driven commissioning model as challenging the foundational principles of European cultural and industrial policy (Idiz et al., 2022). While platforms often frame these contracts in terms of market flexibility and investment opportunity, many professionals in this study described the arrangements as reinforcing asymmetries and eroding producers’ leverage over time.

In this debate, a representative of a non-EU association of film companies, including VOD services, contested the idea that the global platforms consistently retain IP or that European producers are structurally disadvantaged. They argued instead for the principle of contractual freedom in a competitive market: “We see as misleading claims that European producers are in a weak negotiating position towards streamers. In fact, we see a highly competitive market, multiple potential investors for each project” (Interviewee 16, non-EU association). However, this market-oriented view stands in contrast to the perceptions of European film professionals and to a growing body of research (Idiz et al., 2022; Lacourt et al., 2023). These findings suggest that despite the formal possibility of contractual negotiation, structural imbalances persist and are evaluated as a central debate about the impact of VOD in the EFI. In other terms, while formal negotiation remains possible, the findings suggest that real bargaining power is unevenly distributed, making IP control not only a contractual detail but a structural fault line in Europe’s encounter with global VOD platforms. Ultimately, the issue of IP retention encapsulates broader tensions about long-term competitiveness in the EFI.

TOWARDS POLICY PERSPECTIVES

In response to the growing influence of VOD platforms within the EFI, most professionals expressed strong support for public policies aimed at maintaining a fair and balanced ecosystem. Regulatory frameworks such as the AVMSD, which imposes content quotas and allows investment obligations for VOD services, were regarded as necessary to safeguard diversity and reinforce the sector’s sustainability. As one interviewee illustrated:

Now with the new audiovisual law, they have to be more regulated. They have to also invest in a certain type of content, and so this is positive. I don’t think that they should be like having the field of Europe open wide. They need to respect some rules and boost the local talent, and be more respectful with the content they sign and not keeping the IP always. (Interviewee 24, Promotion)

Among the tools discussed, quotas for European works were seen as particularly important. This view was supported by survey findings, in which 62% of respondents rated VOD quotas as extremely or very relevant (Fig. 5.4). Interviewees often emphasised the practical impact of these measures, especially in contexts where local content might otherwise be absent: “In other countries without the quotas, you wouldn’t

have anything. And that's not OK because we are living in a world where you need to have access to more than just a few series that are done to make money" (Interviewee 7, Distributor).

Some stakeholders also call for more ambitious regulatory targets. The current 30% quota was described by one interviewee as insufficient given the availability of European content and the comparative obligations placed on traditional broadcasters: "The 30% quota for us is a bit too low. We would like something more ambitious" (Interviewee 34, Authors). These perceptions represent a more positive view on the relevance of quotas than identified in previous academic papers such as Farchy, Bideau and Tallec (2021).

Professionals also expressed strong support for the investment obligations introduced in the AVMSD, particularly emphasising their importance for countries with smaller audiovisual markets or those that lie outside the primary production circuits of interest to global platforms. Interviewees stressed that, in the absence of such obligations, VOD investment tends to concentrate in a few high-capacity markets, reinforcing existing imbalances within the EFI. As one Dutch producer explained, "When you're from a country like the Netherlands, you're not in a similar position as such a big country. So what these bigger platforms produce is not of quality, and they don't put the same money in it as in productions which come from the UK or from France. So you can hardly compete" (Interviewee 17, Producer). This perspective aligns with findings in the literature, which show that VOD investment strategies vary considerably across countries and often overlook smaller or less commercially attractive markets (Iordache et al., 2022).

While broadly supported by professionals, investment obligations were also viewed through a critical lens by some. Although the literature highlights these obligations as a more impactful regulatory tool than quotas (García Leiva & Alborno, 2020), one interviewee raised a cautionary point, suggesting that such measures could inadvertently consolidate the market power of global VOD platforms. As they explained, "What you create then is that the streaming services become even stronger. Because then they will commission a lot of work because they can manage the quotas with buying content more or less. They don't need to actually commission and produce themselves. So you're actually strengthening their power and influence" (Interviewee 21, Public Institution). While this reflects an individual viewpoint, it articulates a broader concern about the unintended consequences of regulation. Nevertheless, this

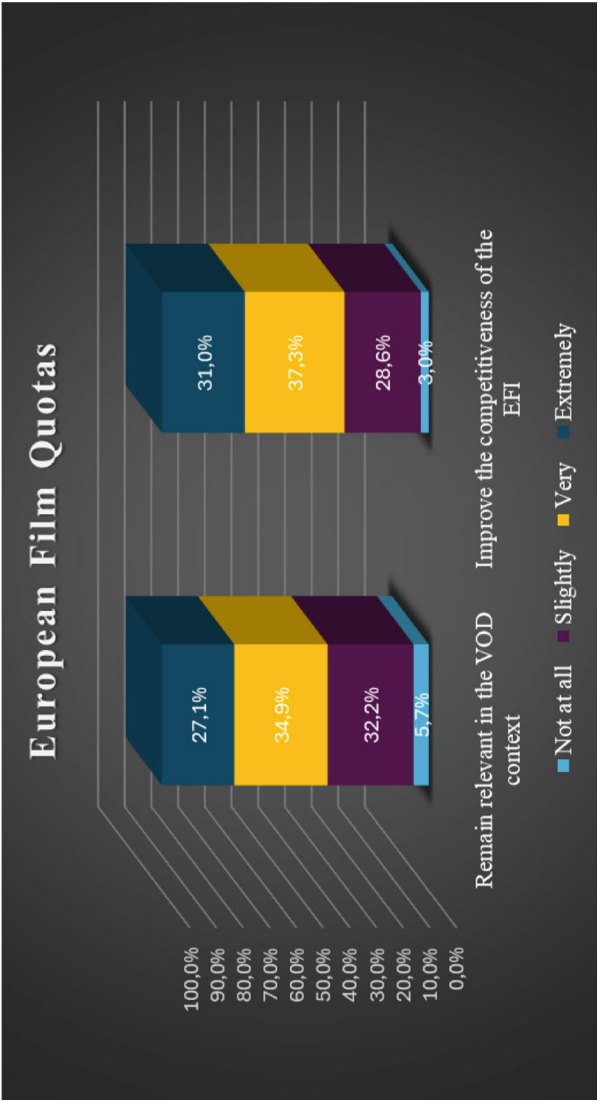


Fig. 5.4 European film quotas

perspective was not dominant in the broader dataset. On the contrary, survey findings show clear support for investment obligations: when asked about the priorities for enhancing the EFI's presence in international markets (Fig. 5.5), 63,4% of respondents identified the imposition of such obligations on both VOD platforms and broadcasters as a central priority.

From the perspective of VOD platform representatives, these regulatory measures are sometimes viewed as overly burdensome and potentially counterproductive. "The problem is that these are very, very prescriptive when you come to the national level [...] It becomes an exercise of compliance rather than creativity" (Interviewee 16, Non-EU association). This statement reveals a broader position among global VOD actors, who tend to resist regulatory obligations on the grounds that they hinder operational flexibility and innovation. A key element of this critique lies in the fragmented implementation of the AVMSD across EU Member States, which is framed by VOD platforms as inefficient and overly complex. This perspective, however, contrasts sharply with that of many European professionals and public institutions, for whom regulation is seen as essential to ensure fair competition and cultural diversity in a highly asymmetrical market (Fernandes et al., 2025).

When asked about the potential role of public policy in supporting the creation of a Europe-based VOD platform, most professionals expressed scepticism. While some acknowledged its benefits, most expressed that it would be extremely difficult to compete with the scale, technological infrastructure, and data advantages of established global players. As a result, the idea, although recognised as important, was not seen as a potential solution for strengthening the competitiveness of EFI. One interviewee captured the general sentiment:

It won't work for many reasons, but the first one is that we don't have the same technological power. I'm not sure we will be able to do the same because they have a lot of data, a lot, lot, lot of data all over the world [...] they have so many information and they are able to in terms of marketing, in terms of discoverability, they know exactly to suggest what you want. (Interviewee 4, Producer)

This scepticism towards Europe-based VOD platforms was also reflected in the survey results. When asked about the contribution of EU-based independent VOD platforms, such as Filmin, Cinobo, or Univerciné, to the competitiveness of the European film industry (Fig. 5.6), 17,3% of respondents said they contribute not at all, and 50,3% described their impact as only slight. Even lower expectations were expressed

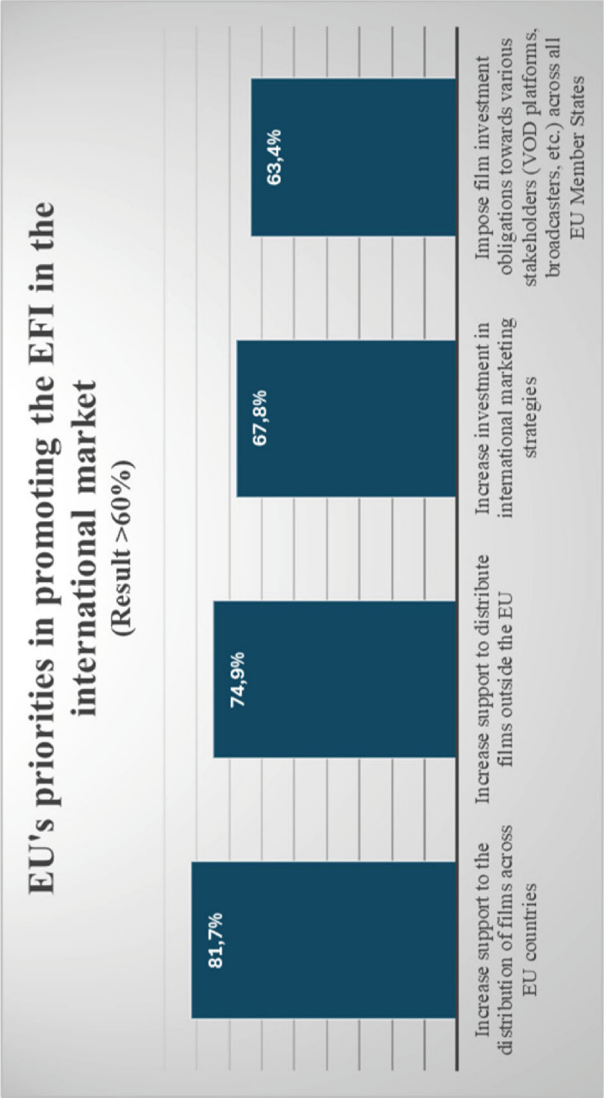


Fig. 5.5 EU's priorities in promoting the EFI in the international market

regarding their ability to engage younger audiences: 20,4% stated they do not contribute at all to this goal, making it the least impactful dimension evaluated. As such, they are not yet seen as significant drivers of competitiveness or generational outreach within the EFI. Once again, this reflects the persistent economic asymmetries between the EFI and US-based VOD players, an imbalance that surfaces not only in market dynamics but also in discussions around feasible and effective policy solutions.

CONCLUDING REMARKS

This chapter has explored how professionals within the EFI perceive the transformations brought by VOD platforms across five key areas drawn from the academic literature: algorithmic content curation and visibility; marketing strategies and audience positioning; data access and asymmetries; and the control over IP. While these areas are often addressed in regulatory and scholarly discussions, the empirical material shows that professionals approach them with distinct emphases and concerns.

Among all the dimensions discussed, the retention of IP emerged as the most pressing concern for professionals. Stakeholders highlighted how losing control over IP in collaborations with global streamers undermines the sustainability of independent production and limits the ability of European producers to reinvest and maintain autonomy. This concern reflects a broader shift in how professionals perceive the role of VOD platforms, moving from a pragmatic and sometimes enthusiastic engagement, particularly during the COVID-19 pandemic, to a more cautious and critical perspective. While initial collaborations were seen as providing much-needed resources and visibility, professionals are now increasingly focused on the long-term implications of these partnerships and their impact on the sustainability of the EFI.

Despite recognising the short-term benefits that VOD platforms brought, such as financial investment and broader distribution, most professionals do not see them as contributing meaningfully to the long-term competitiveness of the EFI. This scepticism was echoed in the survey results, where VOD was more often viewed as a threat to the sustainability and cultural diversity of the EFI than as a reliable partner for growth.

This emphasis on IP control reveals a structural critique not always central in regulatory discourse, yet clearly aligned with concerns raised in recent academic studies about the long-term implications of IP loss for EFI competitiveness (Lacourt et al., 2023). The concentration of

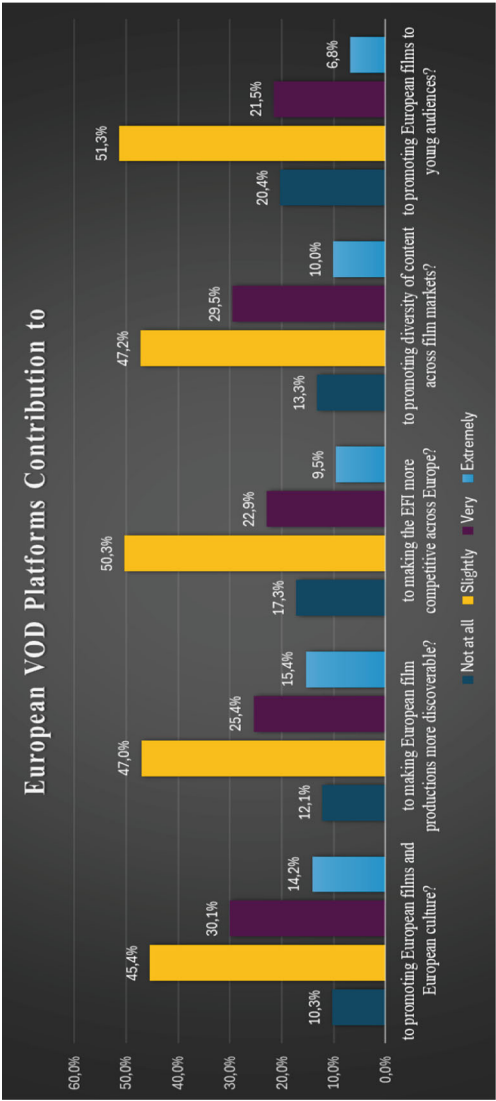


Fig. 5.6 Respondents' views on EU VOD platforms' contribution

rights in the hands of global platforms is perceived as diminishing producers' bargaining power and weakening the broader cultural and industrial autonomy of the European audiovisual sector.

A notable pattern throughout the interviews is the strong emphasis on the production stage. While algorithmic curation and discoverability are prominent in academic and policy debates, they did not emerge as priority concerns among professionals interviewed. This does not imply indifference, but rather reflects the fact that many professionals are primarily concerned with the production stage, where the impact of VOD platforms is felt most acutely in terms of financing structures, resource allocation, and creative control. Their focus highlights a persistent feature of the EFI, which has historically centred policy attention and public funding mechanisms on supporting production (De Vinck, 2014).

Another finding is the emphasis on the persistent asymmetry in competitiveness between European and US-based players. These disparities in production budgets, promotional spending, and technological infrastructure shape professionals' views on the challenges brought by global VODs and on the limitations of potential policy responses. In the context of regulation, professionals expressed broad support for the AVMSD, endorsing its rationale of fostering a level playing field and promoting cultural diversity across the EU (Vlassis, 2017; Fernandes et al., 2025). Investment obligations were also positively received, particularly by stakeholders in smaller markets who see them as vital to ensuring production continuity. The idea of a policy establishing a strong EU-based VOD platform to counterbalance US dominance was not received with enthusiasm. Although some acknowledged its potential to enhance visibility and cultural sovereignty, most professionals viewed it as an unrealistic endeavour given the technological and competitive advantages held by US-based platforms. Once again, this position underscores how entrenched economic asymmetries influence the perceived challenges and limits of feasible solutions within the EFI.

Ultimately, this research reinforces the value of incorporating bottom-up perspectives into debates on regulation and digital transformation. The priorities voiced by professionals do not always align with the focal points of current policy instruments or scholarly frameworks. While policymakers and scholars often emphasise visibility and audience access, professionals working in the industry highlight economic and creative autonomy, fair contractual terms, and sustainable production models as critical issues.

These findings underscore the need for greater responsiveness in European regulatory strategies to the lived realities of professionals. Future research could further explore how national contexts mediate professionals' perceptions, particularly in small- and medium-sized markets. In addition, longitudinal studies could help assess how these concerns evolve as regulatory environments adapt and as global platforms adjust their presence in the European audiovisual space.

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CHAPTER 6

A Mission-Oriented and Market-Shaping Agenda for the European Film Industry—Building Audiences and Alliances in and with Argentina, Brazil, Mexico, South Korea, South Africa, and Turkey

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INTRODUCTION

The literature has discussed the transnational dimension of film consumption and production (e.g. Behlil, 2020 regarding the Turkish film industry), the relational logic of film consumption (Wessels, 2023) and

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the shift of elements of the film value chain—such as distribution—from a supply-led to a demand-led paradigm (Kehoe & Mateer, 2015). However, this dynamic logic is rarely reflected in academic or policy reflections focused on strengthening the European Film Industry (EFI). Rather, the latter tends to focus on expanding existing markets and audiences. Exceptions to this state of affairs are rare and do not consider the European Union (EU) (Howse & McLarney, 2006).

This chapter addresses this gap by drawing on data gathered for a REBOOT report examining the views of filmmakers, producers, distributors and other key stakeholders in six non-EU markets (Argentina, Brazil, Mexico, South Korea, South Africa, and Turkey) regarding the EFI’s “Europeanness”, namely in terms of funding, co-production, and other topics (Dâmaso et al., 2025; also see Dâmaso et al., 2026). The data was gathered with a mixed-methods approach, combining quantitative and qualitative methods. A common international survey was implemented between November 2024 and March 2025 across the six international markets focused on stakeholders’ perceptions of the EFI, its strengths and weaknesses, the local circulation of European films, and their opinions on the EFI vis-à-vis its international counterparts. In total, 425 responses were included in the dataset. Additionally, 99 semi-structured interviews were carried out with key informants across the film supply chains in these markets.

The six case studies provide insights into key international film markets with which the EU already has existing relationships but potential for stronger cultural, industrial, and economic ties. Argentina, Brazil, and

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Mexico produce over 80% of the region's fiction films market and maintain strong links with Spain and Portugal. Annually, around 40–50 co-productions between European and Latin American (made possible by 27 co-production agreements) are released. Globally, although South Korea is the eighth largest market by gross box office, European productions have relatively limited space to circulate in this market—especially in comparison with Hollywood and Korean films. The South African film industry has been growing steadily but remains a niche producer that is dependent on American partners; moreover, European films struggle to circulate in this country. Finally, Turkey is a strong fund recipient, co-producer, and partner in distribution and exhibition with EU countries.¹

The data suggests that these six markets face similar needs that can be partially addressed with active, long-term film policies that establish alliances between the European Union and non-EU actors. In particular, the chapter focuses on existing needs in these markets in terms of building audiences for European and non-European independent films, supporting the development of local sustainable film industries, and the long-term relations between these six film industries and the EFI. This argument rests on three assumptions. First, it rejects the idea that, in the absence of market failure, sustained lack of demand for a particular good—in this case, European or non-European independent films—should not be significantly influenced by public policies. Second, the chapter recognises that increased access to European and non-European films contributes to culturally diverse ecosystems, which support social welfare. Third, linking the first and second assumptions, failure to provide for European and non-European films in the six markets under analysis is considered a market failure that justifies the involvement of public policies. The idea is, then, that the global competitiveness of the European film industry could be strengthened with the addition of a market-creating (Mazzucato, 2015) policy dimension to the existing EU film policy agenda.

¹ The research focused on Argentina, Brazil and Mexico was developed by researchers from the University Institute of Spanish Cinema (IUCE-UC3M) and the Audiovisual Diversity Research Group (DivAv-UC3M) at the University Carlos III of Madrid (UC3M), the research focused on South Korea was developed by the Center for International Relations Studies (CEFIR) at the University of Liège (ULIEGE), the research focused on Turkey was led by Kadir Has University (KHAS), and the research done in South Africa was led by Erasmus University Rotterdam (EUR).

This extends current competitiveness discussions (Sarikakis et al., 2026), bringing in a demand-led and relational angle.

The chapter begins by summarising existing literature regarding commercial and cultural relations between the EU and Argentina, Brazil, Mexico, South Korea, South Africa, and Turkey, positioning film agreements in this context. Then, it summarises current trends and the main needs of these six film markets as identified by interviewees and survey respondents—beginning with the presence of the EFI therein and then focusing on film festivals, co-production markets, and embassy events as core elements of market and audience-building strategies. This analysis continues previous research based on REBOOT (Dâmaso et al., 2025), which mapped the main characteristics and challenges faced by these six markets, and concluded by identifying “the weak position of the EFI and the dominance of North American/Hollywood movies in national markets, with the exception of South Korea and Turkey, where domestic films also circulate significantly” (Dâmaso et al., 2025). To address this challenge, the analysis suggested “the strengthening of an extraverted economic attitude from European professionals towards the international-non European film market” (Dâmaso et al., 2025). This chapter continues these efforts.

THE UNTAPPED POTENTIAL OF DEMAND-FOCUSED AND RELATIONAL LOGICS IN GLOBAL FILM MARKETS: TOWARDS A MARKET-SHAPING APPROACH TO FILM POLICY

The depth and intensity of recent and ongoing structural changes to the global film market justify a reframing of existing film policies. We want to suggest that the EU’s global film policies could respond to this need with several overlapping transformations towards a (i) demand-focused, (ii) relational, and (iii) market-shaping understanding of film policy.

First, in opposition to current policies, which assume that policies should focus particularly on supply, market transformations suggest the need for a shift towards demand-focused film policies (that is, policies aimed at increasing aggregate demand for European and non-European film). The relevance of this idea becomes clear when one considers ongoing transformations to the film sector. Streaming services are influencing not only the development of national regulatory frameworks (or

lack thereof) across Global North and Global South countries but also transforming power relations across the production, distribution, and exhibition processes. These challenges are further amplified in a global market dominated by Hollywood, whose supremacy has remained in place despite the emergence of new players (Smits, 2024). Altogether, US streamers have tended to reinforce existing inequalities in film circulation at the national and international levels. That is, streamers have increased the supply of films available in the market; however, that has not helped to address market and power imbalances.

To focus more directly on audiences and the films to which they have access, streamers determine the availability and visibility of films in their services, with some titles being given more attention than others (Lobato & Scarlata, 2022; Smits, 2022). As Alborno and Gallo (2024) have examined, streamers currently determine to a significant extent what films are available, when, and to whom. Discoverability is often subject to algorithmic curation, which tends to favour content with likely global appeal, usually US-made (Smits, 2022), sidelining culturally specific or linguistically diverse works. Despite these advantages, US streamers tend to demand all-encompassing rights, across formats and territories, when commissioning content (Meir & Mitrić, 2025; Chalaby, 2023; Doyle, 2016; Doyle et al., 2021). This limits local producers' ability to profit from their own back catalogues or build long-term value. Without Intellectual Property (IP) rights, production companies are excluded from financial returns (Meir & Mitrić, 2025; Chalaby, 2025).

In this context, international co-productions emerge as an alternative financing mechanism, as a means to achieve broader international distribution, and as a framework that enables producers to retain IP rights (Mitrić, 2025). Moreover, joint production efforts also support the creation of works with greater production value and wider distribution reach, not to mention their creative and cultural benefits they tend to be substantive creative collaborations, involving sustained dialogue between producers and the development of narratives that integrate elements from multiple cultures (Bondebjerg et al., 2018). Over the past decades, European co-production policy has extended its influence well beyond the continent. By expanding the European film policy framework to non-European contexts, the model enables international producers to access European funding and integrate into established networks (Mitrić, 2025; Vinuela, 2019). This explains the existence of bilateral treaties between European nations and countries as diverse as South Korea,

Turkey, and South Africa, and has encouraged the adoption of European film policies in Latin America. That is, co-productions are both cultural and geopolitical instruments, fostering creative exchange while also extending Europe's audiovisual influence globally (Mitrić, 2025). Therefore, increasing market demand for co-productions with active and cooperative strategies between EU and non-EU markets, which would provide scale and facilitate film distribution and exhibition, would have not only cultural but also broader geopolitical impact.

Another important topic that is directly related to the issue of audiences is that of film festivals and markets. Despite the market changes discussed above, they remain the main platforms for the international circulation of works and are integral to the European film industry's infrastructure. Indeed, as Marijke de Valck (2007) has explained, festivals have evolved from national showcases to transnational systems embedded within global film culture. Central to this are "business festivals" (Peranson, 2008)—industry-oriented hubs that feature film markets where European producers, sales agents, and distributors negotiate rights and secure international deals—which serve as alternative distribution networks, especially for films that fall outside mainstream commercial circuits (Peranson, 2008). Although film festivals and co-production markets could be an important component in strategies to build new audiences, this is often a secondary part of their programming. Analysing the relations between the European film industry and the six markets under study suggests that active audience building is a shared problem that could be addressed by film festivals and other elements of the film industry. This requires a shift in orientation of industry events—to focus them not only on the sector as it is but also on how it could be. Likewise, the public programmes of EU Delegations and of the embassies of EU Member States have an untapped potential in terms of building new audiences (Lähdesmäki et al., 2025).

Second, current debates regarding the EU's global audiovisual policy suggest that there is the need for policies inspired by a relational logic, that is, one that sees the development of relations between EU and non-EU film industries as a pathway to support their resilience and sustainability. Indeed, the EU has positioned itself as a global normative actor for decades, using cultural and media policy as a tool to promote values such as cultural diversity, freedom of expression, and democratic governance (Baltà Portolés, 2019). This is evident and was reinforced with the adoption of the 2005 UNESCO Convention on the

Protection and Promotion of the Diversity of Cultural Expressions, which the EU champions in its external relations—for example, by embedding cultural norms and audiovisual cooperation within broader economic and political frameworks (Vlassis, 2020). Audiovisual policy has thus been used by the EU to strengthen ties with partner countries and regions and to encourage the adoption of regulatory models aligned with its standards, namely through technical cooperation agreements and international cultural instruments, as is evident in its partnerships with South Korea (Loisen & De Ville, 2011; Vlassis, 2016) and with the Latin American region (Fernandes, 2025). This approach also reflects the European Agenda for Culture in a Globalizing World (2007), which recognised culture as a fundamental pillar of the EU's foreign policy (Loisen & De Ville, 2011; Vlassis, 2016). However, in the current context, the EU's normative influence is weakening in regions such as Latin America, where VOD platforms are increasingly shaping policy debates and agendas (Fernandes, 2023; Fernandes & Alborno, 2023).

Although it can be said that EU film policy already includes an implicit relational angle, this component of global EU policy could be reinforced. Doing so in a robust manner to reinforce the role of the EU as a global actor—in terms of film policy but also more broadly—requires strengthening mutual understanding in a sustainable manner. This demands ensuring that the development of international European film policies take into account the views and the needs of non-European actors (Dâmaso, 2026). In academic terms, as we have argued elsewhere (Dâmaso et al., 2026) such a stance can be described as a decentring of EU film policy following the strategy originally identified by Lecocq and Keukeleire (2018), which is in turn influenced by Onar and Nicolaidis (2013)—who, in their foundational article, argued for the need to provincialise Europe by questioning a Eurocentric approach to scientific knowledge and, simultaneously, engage, that is, learn from other perspectives. The EU's international film policies and initiatives are elements of the Union's audiovisual diplomacy and global cultural action (Dâmaso, 2025; Vlassis, 2020) and, therefore, are embedded within EU foreign policy, whose decentring supports better understanding of the stakeholders that are likely to be impacted by such policies and, in doing so, the development of more impactful and sustainable relationships. Aligned with these efforts is a growing body of work concerned with the decolonisation of EU global cultural policy (e.g. Dâmaso, 2025; Joffe & Magkou, 2025) and film policy, namely in Africa (Beschara-Karam, 2025;

Fagbile, 2023; Sendra, 2024), South Korea (Jinsoo, 2018; Park, 2020), Latin America (Seguí, 2023), and in Turkey (Akdede, 2025).

Third, both shifts—towards a demand-led and a relational approach to film markets—are aligned with market-shaping approaches to policy-making inspired by the work of Mariana Mazzucato. Originally developing a heterodox reading of the roles of state investment banks in the economy (Mazzucato & Penna, 2016), such work has extended to innovation policy (Mazzucato, 2016) and to the idea of “long-run strategic investments and public policies that aim to create and shape markets”—understood as “mission-oriented investments” requiring “(1) decision-making on the direction of change; (2) the nature of (public and private) organizations that can welcome the underlying uncertainty and discovery process; (3) the evaluation of mission-oriented and market-creation policies; and (4) the ways in which both risks and rewards can be shared so that smart growth can also result in inclusive growth”. The nature and the complexity of filmmaking is such that co-productions and film markets combine by definition public and private actors, who share risk and rewards. As such, this mission-oriented approach could extend naturally to the film sector.

More recently, the author’s thinking has been extended into an economics of the common good (Mazzucato, 2023), which argues that economics should include the shaping of collective goals within its mission. The authors of this chapter view cultural cooperation and diversity as aligned with this approach. Finally, an initial reflection on the consequences of such a new economic mission in the cultural sphere has also taken place (Mazzucato et al., 2025), although it remains mostly focused on a theoretical reflection for the need for such a shift rather than on identifying specific pathways to implement it. Considering the theoretical potential of the idea alongside its empirical limitations, the authors of the chapter propose to delineate a market-creating agenda (focused on co-production markets, film festivals, and embassy initiatives) that strengthens audiences for European and non-European film, fosters alliances between EU and non-EU film professionals and, in doing so, reinforces the sustainability of such film ecosystems and, more broadly, of culturally diverse film industries. This chapter tests the relevance of such ideas against existing challenges, needs, and initiatives across co-production markets, film festivals, and embassies in six non-EU film markets.

LOCAL FILM MARKETS: CHALLENGES AND NEEDS

The shared need for a demand-led, relational, and market-shaping approach to international film policy from the EU becomes clear when one considers the difficulties faced by the EFI in the six case studies to reach and increase existing audiences. However, before doing so, it is important to understand the broader challenges and needs faced by these markets.

Despite Argentina's high production output and participation in international co-productions, a declining domestic share and recent policy changes have destabilised its film industry. The weakening of public institutions, reductions in state funding, and the increasing influence of global streaming services have compelled Argentine producers to seek alternative financing sources and, at times, prioritise commercially driven content over artistic innovation. US productions dominate the Argentine box office, primarily because both the distribution and exhibition sectors are highly concentrated in the hands of foreign companies. While international co-productions, especially with European partners, provide strategic opportunities, current frameworks often fail to meet Argentina's specific needs. Ensuring a sustainable future for the sector will require renewed public support, targeted policies, strengthened distribution networks, and expanded independent exhibition circuits.

Brazil's film industry has a strong production capacity, despite structural challenges that limit its growth and international positioning. The dominance of Hollywood productions, supported by a distribution system largely controlled by US companies, along with a limited exhibition network, restricts the circulation of domestic and European independent films. National productions remain heavily dependent on public support, which is often unstable. While international co-productions offer opportunities to access foreign funding and audiences, they come with their own set of challenges. In the case of co-productions with European partners, Brazilian participants have highlighted outdated agreements, complex procedures and financial requirements that fail to account for currency disparities as key barriers.

In Mexico, the proximity with Hollywood has contributed to a highly developed audiovisual sector, often used by major studios and more recently, by US-based global streaming services. A high concentration of the exhibition and distribution sectors limits the commercial success and visibility of domestic and European films. In this scenario, support

for independent exhibition circuits is particularly important for fostering long-term growth. Stakeholders have also emphasised the need for deeper reforms in public support in the production and distribution sector for a more balanced and sustainable audiovisual sector. Co-productions are highly valued as spaces for financial and creative collaboration, with the United States remaining the main co-production partner for Mexican stakeholders. European partners are valued for facilitating access to wider markets and enabling knowledge exchange; however, Mexican professionals have also identified certain challenges that hinder implementation, including unclear co-production agreements and complex bureaucratic processes.

Despite the continued growth of South Africa's film industry, accompanied by the intensification of public policies to attract investment, the country's audiovisual ecosystem remains dependent on international productions, and South African films face significant challenges in reaching audiences due to the high concentration of exhibition and distribution circuits. To guarantee the sustainable development of the industry, greater support tailored to small and independent players is needed. In this context, European festivals and co-productions are recognised as important industrial models. However, persistent difficulties in accessing European festivals and co-production markets, such as insufficient or inadequate forms of support as well as bureaucracy, hinder the intensification of collaboration between South African and European stakeholders—as does the perceived lack of serious commitment from the latter towards the development of the South African film industry.

The South Korean film industry is characterised by strong production capacity and a high domestic market share, largely driven by vertically integrated conglomerates. However, its structure remains heavily oriented towards commercial blockbusters, offering limited space for independent and arthouse cinema. The COVID-19 pandemic intensified existing vulnerabilities by reshaping viewing habits and reducing private investment, while public support has also declined. These pressures are prompting shifts in the sector. Although the industry has traditionally been self-sufficient and only marginally engaged with the EFI, the current context is creating openings for dialogue, as South Korean professionals increasingly explore new international opportunities. Yet the EU–South Korea co-production framework remains underused due to linguistic, cultural, and logistical barriers. Strengthening these links will require targeted policy measures, more accessible and inclusive funding schemes,

and sustained efforts to foster mutual understanding and professional exchange.

Turkey's film industry is facing a protracted period of post-pandemic stagnation, marked by a sharp dichotomy between profitable mainstream hits and precarious independent productions. As domestic support dwindles due to the politicisation and inadequacy of Turkey's Ministry of Culture funds, which is the only public fund available in the country, film-makers increasingly view European co-productions not merely as financial options, but as existential necessities for artistic freedom. However, this integration is threatened by the Lira's collapse, which creates severe structural asymmetries; producers are often forced into minority stakes or struggle to meet European spending mandates. Additionally, while A-list festivals remain vital for the visibility of Turkey's arthouse films, soaring costs have drastically curtailed the physical mobility needed for networking. Consequently, without new, equitable support frameworks that account for these economic disparities, Turkey's independent film industry risks isolation, losing both its sustainability and its crucial cultural dialogue with Europe.

The six case studies highlight several common challenges, such as limited domestic market share (except in South Korea) and exhibition space for independent and arthouse cinema; concentrated distribution channels; insufficient public support dedicated to independent film and to international film festivals and markets; inadequate mechanisms to protect cultural diversity and artistic freedom; insufficient opportunities for professional exchange; and inequitable institutional frameworks. This analysis is confirmed by the data that emerges from the international survey (Fig. 6.1). When asked what areas the EU should prioritise to enhance institutional support to local film industries and therefore contribute to addressing their needs, respondents highlighted in first place the development of co-production markets (37.9%). This data confirm the existence of a desire by non-European film professionals for more active decision-making from European policymakers regarding the future of EU-non-EU film relations, and the importance of film organisations and initiatives to support the creative discovery process (in alignment with Mazzucato, 2016).

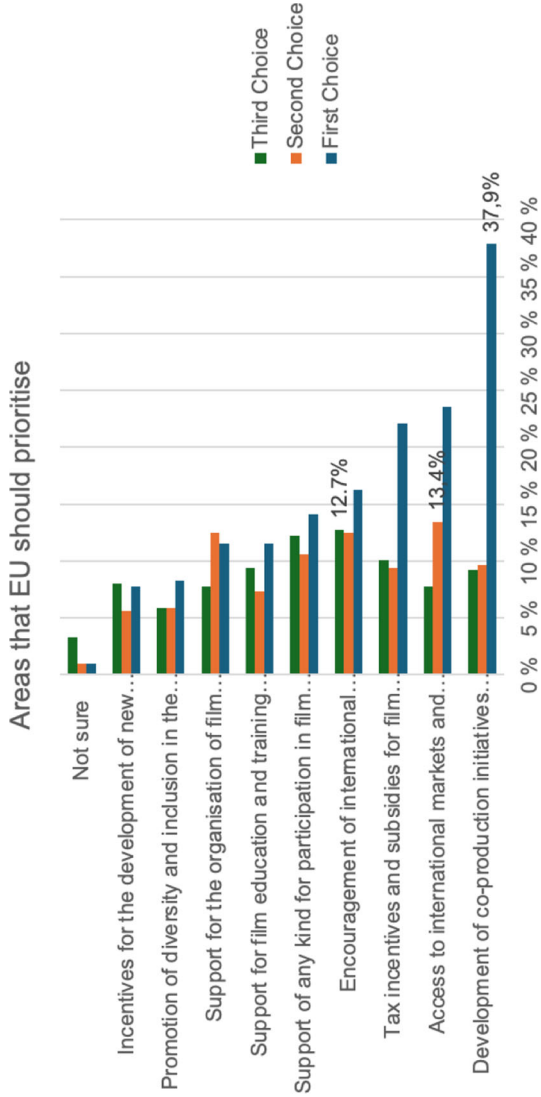


Fig. 6.1 Ranking of areas for EU to prioritise

THE EUROPEAN FILM INDUSTRY: PERCEPTION

Before advancing, it is important to summarise how the EFI is understood in Argentina, Brazil, Mexico, South Africa, South Korea, and Turkey. The data reveal that the EFI is seen as a strong partner and that there is the potential for the intensification of relations to support its development alongside that of these six markets. When asked to define the EFI, most respondents selected International co-productions (63%), *cinéma d'auteur* (60.1%), art cinema (57%), state support (51.2%), and cultural diversity (42.3%) (Table 6.1).

This reveals the association of the EFI with its industrial policy, as is evident in the selection of the options international co-productions and state support, and with its artistic approach, demonstrated by the choice of the option art cinema—both of which support and are framed by the principle of cultural diversity.

Similarly, when asked about the strengths of the EFI, almost 67% of respondents highlighted international co-productions (66.4%), film festivals in Europe and beyond (57.6%), public support (49.9%), arthouse cinema (47.5%), cultural diversity (47.1%), awarded film directors and actors/actresses (40.7%), and artistic freedom (38.6%) (Fig. 6.2).

Table 6.1 Best defining word EFI

<i>Word that describes the EFI</i>	<i>Count</i>	<i>Percentage</i>
International co-productions	267	62.7
Cinéma d'auteur	256	60.1
Art cinema	243	57
State support	218	51.2
Cultural diversity	180	42.3
Freedom of expression	140	32.9
Multilingualism	137	32
High culture	121	28.4
Regional integration	102	23.9
Successful	85	20
Experimental	81	19
Non-commercial	71	16.7
Competitive	63	14.8
Slow cinema	52	12.2
Uncompetitive	18	4.2
Very hard to define	17	4
Blockbusters	15	3.5

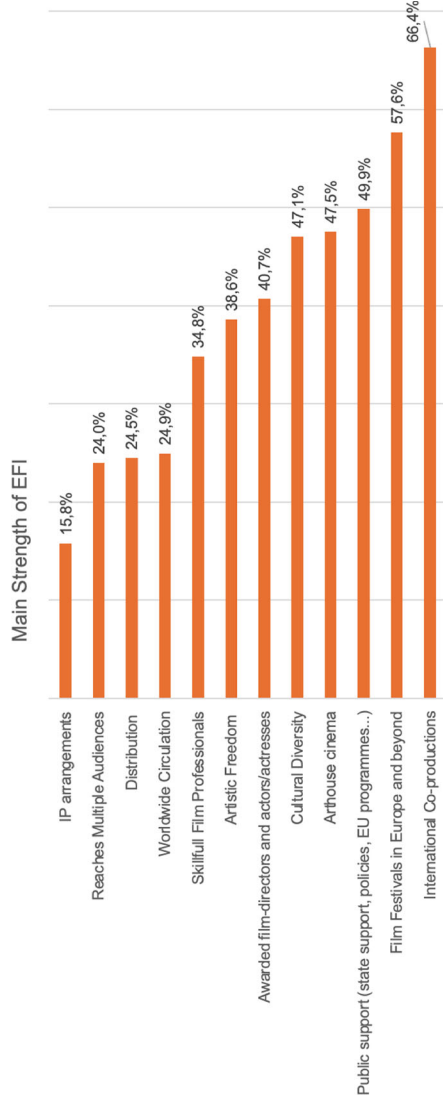


Fig. 6.2 Main strength of EFI

This reinforces the idea that the EFI is understood not only as characterised by a specific approach to filmmaking (arthouse cinema) with high quality film professionals (awarded film directors and actors/actresses) but also as an industrial and policy context that supports their development and work. These findings are echoed in the case studies.

The data collected during interviews and online survey suggests that industry stakeholders in Argentina mainly associate European cinema with *cinéma d'auteur* and art cinema, an understanding shaped by the influence of cinematographic movements such as the *nouvelle vague* and *neorealismo italiano* as well as the European films that usually reach the region, which are from France, Italy, Spain, and Germany, which benefit from robust cultural diplomacy initiatives, established international co-production networks, and access to prestigious film festivals and resources. Thus, the term European Cinema serves not only as a geographic label but also as a strategic marketing identifier associated with auteurship, artistic innovation, and perceptions of high culture and quality. The EFI, by contrast, is associated with strong support programmes, film festivals and markets—emphasising the role of public institutions and policies in supporting all sectors of its film industry, alongside a strong commitment to preserving and promoting cultural diversity.

Similar views can be found in Brazil, where European cinema is associated with cinematic traditions and artistic, thoughtfully made, high-quality productions. As in Argentina, the European films most accessible to Brazilian professionals are the ones from France, Italy, Spain, Germany, and, sometimes, Portugal. European cinema was often explained in opposition to Hollywood, emphasising that European films invite some form of reflection and are not just entertainment, embracing a wider range of cinematic styles as well as languages, genres and stories. When it comes to the EFI, Brazilian industry stakeholders also emphasised the strategic role of comprehensive public policies that support all sectors of the film value chain as crucial for the international success and visibility of the EFI. Regarding the relationship between the two industries, it is clear that European films are historically highly regarded by Brazilian professionals and European countries are valued as co-production partners. Still, even if European films remain prominent in local film festivals, participants note a decline in their visibility within commercial circuits.

In Mexico, stakeholders' perspectives on European Cinema were broadly aligned with the patterns observed in Brazil and Argentina. Mexican participants also think of *cinema de auteur* and art cinema when

defining European Cinema. Again, European cinema was consistently linked with notions of quality, artistic innovation, and audacity—highlighted in contrast with Hollywood. Although cinematic movements and seminal directors and actors were used by industry stakeholders when articulating their understanding of European Cinema, they also noted that Mexican audiences are not as familiar with contemporary European filmmakers and actors, suggesting that this declining recognition may help explain the reduced audience engagement and its status as niche. The EFI, on the other hand, is associated with a tradition of public support and policy-driven production models. European co-production programmes are seen as important avenues for Mexican filmmakers to access funding, foster creative collaboration, and reach international audiences, even if they are also described as bureaucratic and complex. European films hold a prominent place in the non-commercial circuit, including cultural events, thematic weeks, and local film festivals.

In South Africa, the interviews revealed that the EFI tends to be associated with arthouse film. In particular, storytelling was highlighted by several interviewees, as well as cultural heritage and Europe's cultural diversity. Similarly, one interviewee mentioned policy, regulation structures, and co-productions. Finally, several interviewees highlighted the relationship between Europe and Africa, with one of them being particularly critical thereof. Broadly, interviewees tended to acknowledge that opportunities to develop knowledge exchange in the sector have intensified in recent years. All in all, the interviews revealed that European-ness is associated with a storytelling type or film style, diverse cultural heritage and references, and a complex structure characterised by fragmentation and co-productions, that is enabled by specific policy instruments. However, an ambiguous position vis-à-vis also Europe emerged. While the EU is South Africa's main foreign investor in trade, energy, research, innovation, and increasingly culture, investment in its film sector was seen as underdeveloped.

In South Korea, interviewees consistently associated the EFI with arthouse cinema, a perception shared across all professional categories. "European film is arthouse film" was a near-universal characterisation, applied even to commercial European titles, which are still viewed as "artistic", "intellectual", or "socially engaged". The EFI was also linked to strong public support mechanisms, seen as enabling creative risk-taking, talent development, and cultural diversity. Several interviewees contrasted this with the more conservative style of Korean cinema.

Despite these positive perceptions, the actual presence of European films in South Korea remains limited due to structural barriers: a market dominated by commercial blockbusters, concentrated exhibition chains, and audience preferences. European films receive few screens and showtimes, making them high-risk and often unprofitable for local distributors, who lack public support to reduce costs. Professional interaction between the industries was also seen as weak, with limited awareness of cooperation schemes, minimal European presence and persistent linguistic and cultural barriers.

Finally, in Turkey, although industry professionals acknowledge the existence of European commercial cinema, they primarily perceive it as synonymous with auteur, independent, arthouse, and festival-oriented filmmaking. However, the understanding of the EFI goes beyond aesthetics; it is also viewed through the lens of institutional partnership. Due to Turkey's long-standing membership in Eurimages, interviewees inextricably link the EFI with co-production frameworks and access to public funding. In the survey results, the EFI was also linked to freedom of expression and cultural diversity. This outlook reflects a dual dynamic where the EFI is valued not only as a necessary financial network for Turkish arthouse filmmaking but also as a model for artistic freedom. However, the circulation of European films in Turkey remains limited due to structural barriers, including censorship, a lack of promotional support, and the market dominance of Turkish commercial films and Hollywood blockbusters. Consequently, despite being highly regarded by local cinephiles and filmmakers, European films rarely achieve commercial success in Turkey. Instead, their visibility relies heavily on film festivals, which remain the primary platform for accessing European cinema.

Although these markets have many particularities, the data also reveal shared challenges (Fig. 6.3). When asked what the main needs of their film ecosystems are, most respondents (45.9% as first choice) identified access to funding as the key priority, significantly ahead of other options, increased distribution access. As for the second need, responses were led by improved distribution networks (17.2%). The third need identified was access to the international film circuit (13.6%).

In conclusion, the EFI is seen across these six markets as an important partner. Specifically, programmes and initiatives increasing access to funding, distribution and to the international market would further reinforce EU-non-EU film relations and, at the same time, support the development of these six markets in a sustainable manner. This confirms

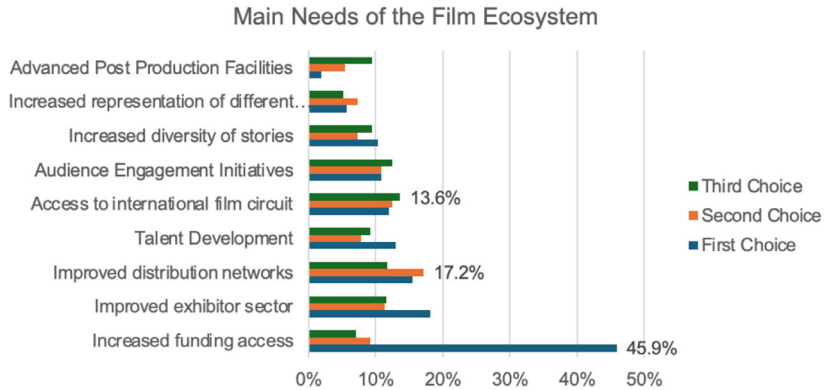


Fig. 6.3 Main needs EFI

yet again that there is space for EU policymakers to support policies and initiatives that are mission-oriented and market-shaping (Mazzucato, 2016). Their evaluation could happen with simple but regular data gathering exercises such as the survey whose data is reported in this chapter.

CO-PRODUCTION MARKETS

Increased and strengthened programmes to support EU-non-EU co-productions would address these needs while also supporting the global circulation of European film and reinforcing the presence of the EFI in these six markets—which this section summarises briefly.

Argentina has international co-production agreements with 13 countries, four of them European: Germany, Spain, France, and Italy (INCAA, n.d.). It is also a part of the Ibermedia Program and the Latin American Film Co-production agreement, which includes Spain. Moreover, renewed discussions around the EU-Mercosur trade agreement, aimed at reducing tariffs and fostering sustainable practices, signal a strong commitment to deepen EU-Latin American relations. Historically, Spain is Argentina’s most significant co-production partner. In addition, Ventana Sur, the most important audiovisual market in Latin America, is an initiative between Argentina’s National Institute of Cinema and Audiovisual Arts (INCAA) and the Marché du Film of the Cannes Film

Festival, and a crucial hub for international co-production in the region. There are also a number of co-production markets and forums aimed at facilitating collaboration between Latin American and European professionals, such as the Europe-Latin America Co-Production Forum at the San Sebastián Film Festival and the Quirino Awards Co-Production and Business Forum. Moreover, most European film festivals have activities centred on the international co-production of films, such as the Co-production Day at the *Marché du Film* or the *Berlinale Co-Production Market* held during the Berlin International Film Festival. Argentina has strong co-production ties with European countries, which are crucial not only for accessing foreign grants and reaching international markets but also for fostering cultural and professional exchange. Still, European co-production agreements and supporting programmes were described as complex, bureaucratic, and with funding thresholds overlooking the realities of the Argentine film sector.

As for Brazil, it has bilateral co-production agreements with 13 countries, six of them European: France, the UK, Portugal, Spain, Italy, and Germany. The country with which Brazilian producers have most frequently worked is Portugal. At the multilateral level Brazil is part of the Ibero-American Cinematographic Integration Agreement, and the Ibermedia Program. Other initiatives include the Luso-Brazilian Protocol, an initiative between ANCINE and the Portuguese Institute of Cinema and Audiovisual (ICA) to co-finance films between both countries, as well as, Rio Market, the industry side of the Rio de Janeiro International Festival and the Audiovisual Ideas Market, the professional arm of *Mostra Sao Paulo*, another of Brazil's major international festivals. Furthermore, the Paris Brazilian Film Festival includes the France–Brazil Audiovisual Forum, which features panels dedicated to international film and television co-production. Similarly to Argentina, Brazilian film professionals also participate in many co-production forums in Europe targeting Latin American stakeholders, in addition to the co-production initiatives offered at leading European film festivals. Brazilian industry stakeholders also highlighted the importance of co-productions with European partners but described existing programs as outdated, disconnected with current practices, bureaucratic, and lacking clear information regarding eligibility and requirements.

Regarding Mexico, the country has co-production agreements with Spain, France, Switzerland, Venezuela, Senegal, Argentina, and Canada. It participates in the Ibermedia Program as well as the Latin American

Cinematographic Co-Production Agreement. With regard to audiovisual markets and international co-production forums, two initiatives are particularly notable: the Iberoamerican Co-Production Forum at the Guadalajara International Film Festival (FICG) and the Mestizo Lab co-production encounters. The Guadalajara forum, part of Mexico's most prestigious festival, fosters collaborations across Iberoamerica. Mestizo Lab, on the other hand, aims to reinforce professional ties between Mexico and Spain, offering dialogue spaces, industry panels, project showcases, and workshops to support professional development. Beyond Mexico, other events hold significant importance in fostering Europe-Latin America audiovisual ties. These include the Europe-Latin America Co-Production Forum, held annually at the San Sebastián Film Festival. Since its inception in 2012, the Co-Production Forum has aimed to promote the development of film projects linking Europe and Latin America, while strengthening international co-production and distribution networks (SSIFF, 2024). In addition, there is the Mexican film festival Viva Mexico, held in Paris, and the Biarritz Film Festival. Producers emphasised that many co-production agreements with European countries are bureaucratic in nature and include restrictive conditions that can hinder their practical implementation.

South Africa has co-production agreements with Canada (1997), Italy (2003), Germany (2004), the United Kingdom (2007), France (2010), Australia (2010), New Zealand (2011), Ireland (2012), The Netherlands (2015), and Brazil (2019). It should also be noted that the French agreement was updated in 2022, overcoming an exclusive focus on feature-length films. Additionally, South Africa has joint film funds with European countries, such as the Thuthuka fund, a partnership between the Dutch Film Fund and the South African NFVF that supports four development projects a year (two in South Africa and two in the Netherlands). While interviewees valued these initiatives, they commented on the bureaucracy and complexity of European co-production arrangements and argued that their financial demands are not adapted to the reality of South Africa. Moreover, power imbalances remain—for instance, regarding access to European archives with documentation about South Africa, which can be facilitated when the demand is made by European rather than South African stakeholders.

In South Korea, co-productions with the EU remain limited despite the existence of institutional frameworks intended to facilitate collaboration. The EU–South Korea Protocol on Cultural Cooperation, created

under the 2010 Free Trade Agreement, technically allows co-productions. However, interviewees did not identify the protocol as active or influential, noting its minimal visibility and limited operational impact. At the national level, France is the only EU Member State with a bilateral co-production treaty with South Korea (signed in 2006), yet outcomes have been modest, with only ten feature films produced under the agreement. Barriers to co-production include weak industry networks, legal and bureaucratic complexity, and differing production timelines and financing structures. As the South Korean industry faces structural pressures—post-COVID-19 shifts in audience behaviour, declining public investment, and reduced private funding—some professionals are beginning to view co-production as a strategy to sustain production. The Asian Contents & Film Market (ACFM) at BIFF remains the main platform for international engagement, with some interviewees also reporting positive experiences in European training environments such as the Rotterdam Producers Lab. Although not mentioned directly by participants, the Ties That Bind initiative is a relevant scheme fostering Europe–Asia co-production, although South Korean participation remains limited. Across interviews, cultural and language barriers emerged as persistent challenges to deeper cooperation.

Turkey's integration into the European film ecosystem is structurally anchored by its membership in Eurimages since 1990 and its adherence to the Council of Europe's Convention on Cinematographic Co-Production. A bilateral treaty with France and the EFTA agreement further consolidate these ties, enabling Turkish films to access European subsidies. On the ground, there are two co-productions markets where EFI is highly present. Meetings on the Bridge, founded in 2006 within the Istanbul Film Festival, is the country's most established platform, supporting fiction and documentary projects through networking and awards. Its reach is strengthened by the Turkey-Germany Co-Production Development Fund, which has financed 67 projects by 2023. The Antalya Film Forum, part of the Antalya Golden Orange Film Festival, similarly connects Turkish and regional projects with international decision-makers; yet its dependence on public funding makes it vulnerable, as shown by the festival's 2023 cancellation amid censorship disputes. In recent years, the national broadcaster TRT launched TRT 12 Punto Script Days to support script development and co-production, where European industry stakeholders are involved. Moreover, TRT has increasingly taken minority roles in European films while sponsoring awards in Sarajevo and

Karlovy Vary to bolster its regional presence. Overall, while European co-productions are vital for financing and visibility, especially for Turkish independent cinema, their sustainability remains tightly tied to political stability and institutional continuity in the country.

All case studies reveal a pattern of gradually intensifying relations with the EU and its Member States through the establishment of co-production agreements and initiatives, which are seen by non-European film professionals as important to support industrial vitality and cultural diversity. However, such programmes are often described as bureaucratic, complex, outdated, unclear, and not adapted to the industry's needs and to the financial particularities of non-EU contexts, with persistent power asymmetries. These difficulties are compounded by existing cultural and language barriers. Investment by the European Union (and, secondarily, by the governments of the surveyed markets) in reciprocal access of non-European and European film professionals to European and non-European film festivals—a shared risk—would support the establishment and intensification of EU/non-EU industrial networks, thus indirectly supporting creative experimentation across borders—a shared reward (in alignment, again, with Mazzucato, 2016).

FILM FESTIVALS AND EMBASSY EVENTS AS POTENTIAL ASSETS IN AN AUDIENCE-BUILDING AND MARKET-SHAPING AGENDA

As the previous section demonstrates, the EFI and its circulation is perceived as an important contributor to cultural diversity in these six markets. In this section, we focus on two main opportunities for audience engagement and market building with strong potential in this context: European film festivals (including co-production markets) and events organised by embassies (both EU Delegations and the embassies of EU Member States).

Film Festivals

Local film festivals in Argentina play a central role in promoting European films, such as the Mar del Plata Film Festival and the Buenos Aires International Independent Film Festival (BAFICI). With regard to the Mar del Plata International Film Festival, it is a category A event with a strong

presence of European cinema in every edition. BAFICI also curates a diverse selection of European films, providing a prominent space for independent and non-commercial European films, facilitating their visibility among local audiences and professionals. Another relevant initiative from the private sector is MUBI Fest organised by the streaming service MUBI which focuses on independent films, many of them European. Argentine professionals frequently mentioned film festivals when attempting to define the EFI, viewing these events as a means to reach international audiences, raise their profile, and establish professional ties with European counterparts. Challenges in accessing these events were also noted, stemming from currency disparities and the sector's heavy dependence on public funding. Stakeholders also noted the declining presence of European film professionals at local events, stressing that such interactions are important for raising audience awareness and fostering connections and opportunities.

Several local film festivals in Brazil also showcase European films, playing a key role in their dissemination. Two key events in the country are Mostra São Paulo (São Paulo International Film Festival) and the Festival do Rio (Rio de Janeiro International Film Festival). Furthermore, there is the Mostra de Cine Europeu (European Film Exhibition) which is the film component of the Semana da Europa (Europe Week), a multidisciplinary cultural festival held in Brasília. MUBI Fest, the festival promoted by the streaming service MUBI, is also present in Brazil. European film festivals are regarded as essential by Brazilian industry stakeholders, though access is limited by costs and heavy dependence on public support to access these events. Festival organisers have also highlighted the screen fees charged by European sales agents as a barrier to selecting films for festivals and thematic weeks.

As for Mexico, film festivals such as the Guadalajara International Film Festival (FICG) and the Morelia International Film Festival (FICM) provide significant exposure for European cinema, offering opportunities for European films to reach Mexican audiences beyond traditional commercial circuits. In the case of the FICM, it has a partnership with the Semaine de la Critique (Critics' Week) of the Cannes Film Festival. This collaboration facilitates the exchange of cinematic works between the two festivals, allowing Mexican filmmakers to showcase their works on an international stage and bringing notable selections from Critics' Week to Mexican audiences. Other events include: the Macabro FICH, the International Documentary Film Festival of Mexico City (DocsMX),

the FICUNAM, and the Ambulante Documentary Film Festival (Ambulante Gira de Documentales). Additionally, Mexico City has held two editions of MUBI Fest, although the 2025 edition was cancelled.

Some of the same problems identified in Brazil and Argentina can also be seen in Mexico. Mexican stakeholders have highlighted the importance of European film festivals, as cultural and industry hubs where films are not only showcased to different audiences but also where key stakeholders can network and initiate partnerships. European film festivals play a key role in granting artistic validation to Mexican films and shaping which European titles enter the local market, as distributors tend to acquire films selected or awarded at major festivals. Yet, rising costs and limited funding have made participation in these events increasingly difficult.

In South Africa, professionals also view European film festivals as playing multiple roles: social (because meeting people face-to-face and building a network in the sector is crucial, something that is particularly difficult for South Africans due to the high entrance fees and other costs associated with such trips, combined with their weak domestic currency), cultural (by enabling professionals to see films or documentaries that place artistic and cinematographic value above other considerations), and industrial (in that European Film Festivals function as industrial models from which the South African film industry takes inspiration to support capacity building, market development, and programming). In particular, the following festivals are recognised as highly important: Cannes, in which the South African film industry has had an official presence since 1997; Berlin; Venice; Series Mania in France; MIPS and MIPCOM in Cannes; Gothenburg Film Festival in Sweden; IDFA in Amsterdam; Rotterdam; Locarno; DocLisboa. Two festivals were also mentioned in the United Kingdom: Encounters Film Festival in Bristol and Sheffield Festival, England. South African filmmakers are supported by the Hubert Bals Fund of the Rotterdam Film Festival, the World Cinema Fund of the Berlinale, and Aide aux Cinémas du Monde or World Cinema Support—led by the French Film Institute. Some of these festivals include African pavilions and markets but interviewees did not always agree regarding the success of these initiatives. Although they are supported by European schemes and an increasing number of South African programmes, existing support to attend European festivals continues to be insufficient vis-à-vis existing demand.

Given the limited exhibition landscape for arthouse cinema in South Korea, film festivals are central to introducing European films to local

audiences and enabling professional exchange. They function as temporary yet essential spaces where European cinema gains visibility. The Busan International Film Festival (BIFF) is the country's main gateway for European professionals, with most EU countries represented under the European Film Promotion (EFP) umbrella. Beyond BIFF, interviewees also mentioned the Jeonju International Film Festival (JIFF) and the Bucheon International Fantastic Film Festival (BIFAN) as relevant platforms for independent and international cinema. However, professionals reported that the presence of EU film representatives at these festivals remains limited, restricting opportunities for sustained networking and broader promotion. Some interviewees noted that European films tend to gain attention only when associated with well-known directors or major festival awards.

Finally, according to film professionals in Turkey, both the major festivals in Europe and those organised in the country play vital social, cultural, and industrial roles. The market sections of A-list European film festivals like the Berlinale, Cannes, Venice, and Rotterdam are revered as critical industrial gateways for accessing funding and opportunity of audience engagement. In this context, Istanbul Film Festival and its autumn counterpart, *Filmekimi*, stand out as the foremost platforms where European titles are systematically curated and followed by a loyal audience. Similarly, the Antalya Golden Orange Film Festival and the Adana Golden Boll Film Festival ensure high visibility for European productions through their respective international competition and World Cinema sections. Interviewees describe these festivals as "sacred spaces" that foster community and offer a collective viewing experience. These festivals serve as the primary channel for discovering diverse examples of European cinema and independent productions in Turkey. Moreover, as previously noted, the festivals in Istanbul and Antalya extend their impact beyond exhibition by organising co-production markets. These platforms bring together Turkish filmmakers and European stakeholders, thereby fulfilling a crucial industrial function alongside their cultural role. Besides these festivals, the EU Delegation to Turkey has been organising the EU Human Rights Film Days since 2010. While this event is primarily anchored in Ankara, the Delegation recently launched a travelling initiative, European Cinema Days, to extend the reach of European films to other cities. Consequently, a distinct dichotomy emerges: while European titles remain largely marginalised in the commercial box office, they successfully sustain

their visibility and cultural capital through these alternative, festival-driven exhibitions.

European film festivals, and especially co-production markets therein—happening both in these six countries and in Europe—are understood by non-EU film professionals as crucial to help them diversify funding sources, co-production opportunities, and distribution circuits, and to strengthen the presence of arthouse and/or independent films in their domestic markets as well as their international circulation. However, professionals complain of limited opportunities for participation, networking, and promotion within such festivals. At the same time, other stakeholders are beginning to emerge and to challenge the EFI's position as the preferred international partner of non-EU film professionals in their co-production and distribution strategies. Besides weakening the growth and vitality of a sector that is crucial for cultural diversity, insufficient support and limited opportunities for non-EU film professionals create a critical gap that other international actors—such as China, Russia, and others—are increasingly attempting to fulfil. In this context, the EU's international film policy could take on a more active and market-shaping approach. Doing so would have cultural, social, economic, and geopolitical significance.

The Role of Embassies

There are various initiatives organised by European embassies and cultural centres to further facilitate the circulation of European cinema in Argentina. Some events worth highlighting include the Encuentro del Cine Europeo (European Film Festival), organised by the EU Delegation in Argentina, in cooperation with the embassies and cultural institutes of EU member states accredited locally; Espanoramas, organised by the Spanish embassy and the Centro Cultural of Spain in Buenos Aires city (CCEBA), the Festival de Cine Alemán, run by German Films with the support of the Embassy of the Federal Republic of Germany and the Goethe-Institut and the Festival de Cine Francés, organised by the French Institute of Argentina—French Embassy in Argentina. During these events, distributors often organise releases to capitalise on the promotional impact generated. Still, even if these events serve as a meaningful alternative in a film market overwhelmingly shaped by Hollywood influence, their impact in the commercial circuit is constrained. In addition, although these events share similar objectives, their structures

vary considerably, as each must adapt to available resources, local conditions, and institutional partnerships. Some of the challenges mentioned by participants include limited marketing budget, bureaucratic complexities, and the involvement of multiple institutions.

The same scenario can be observed in Brazil, where a number of events are organised by European embassies and cultural centres to showcase films from their own countries. Notable initiatives include the Varilux French Film Festival, a partnership between the Varilux brand (Essilor), the French Embassy in Brazil, the Alliance Française, Air France, the Accor hotel Group, and key sponsors such as Pernod Ricard/Lillet, and more recently AXA and Michelin; the Festival de Cinema Italiano, a hybrid event organised by the Italian Embassy in São Paulo and the Italo–Brazilian Chamber of Commerce (Italcam), with support from the Italian Ministero dei Beni e delle Attività Culturali e del Turismo (MiBACT), the Istituto Luce Cinecittà, and ANCINE. Along similar lines, the Mostra de Cinema Alemão: Elas Dirigem! is a free showcase of German feature films directed by women, organised by the German Consulate General in São Paulo in partnership with the Goethe-Institut and Sesc São Paulo. Finally, there is the Mostra de Cine Europeu, which is part of the Semana da Europa, a broader event organised by the EUNIC in Brazil in partnership with the Delegation of the EU and its member state embassies. Participants identified similar needs regarding the organisation of these events including: increased marketing budgets, greater autonomy in selecting films suited to local audiences, and reduced bureaucratic processes.

Mexico also has several initiatives promoted by European embassies or cultural centres that aid the circulation of European films in the case. Of particular relevance is Tour de Cine Francés, regarded by Unifrance as the world's most important travelling French film festival, the event was established through a partnership between Mexican distributor Nueva Era Films, the Cinopolis exhibition chain, the French Embassy, and the Mexico's Alliances Françaises network. Other initiatives include the Festival de Cine Alemán, organised by the Goethe-Institut in Mexico City and the European Film Festival, organised by the EU Delegation in Mexico, together with EU member state embassies and the Mexican Secretariat of Culture. The event aims to act as a cultural bridge, promoting shared values such as gender equality, environmental protection, and intercultural dialogue (EU Delegation in Mexico, 2025). In the case of the European Film Festival one interviewee highlighted that bureaucratic constraints

and the fact that local embassies, who know the Mexican audience best, are not allowed to select films reduce the event's effectiveness.

The annual European Film Festival is the most important opportunity for South Africans to access European film. It combines screenings in Johannesburg and Cape Town, an online programme (providing wide access to screenings) and workshops and masterclasses. Interviews confirmed that South African filmmakers use the festival's screenings as unofficial opportunities for professional development (Lähdesmäki et al., 2025). Similarly, the Italian Film Focus makes Italian films and co-productions available; it tends to be accompanied by meetings between filmmakers hosted by the Italian Embassy. At the same time, several South African interviewees mentioned the BRICS Film Festival as a relevant reference. It has been held since 2016 and gives film professionals the possibility to exhibit films to new audiences without taking on high costs, and it allows professionals to exhibit films from South Africa—for example, in the Moscow International Film Festival.

In South Korea, beyond the role of film festivals, embassies and national cultural institutes constitute key channels for the promotion of European cinema. These activities are largely driven by national initiatives, with France and Italy standing out as the most active in organising screenings, thematic showcases, and curated retrospectives throughout the year. Such events typically highlight the work of a specific European country and offer one of the few consistent avenues for European films to reach Korean audiences. Festival programmers and exhibitors regularly collaborate with these institutions, particularly when seeking financial or logistical support to bring European directors, actors, or industry delegates to South Korea. Interviewees reported that South Korean participation in European film festivals is largely limited to Cannes, Berlin, and Venice. While these three events are viewed as essential gateways to European industry, such a narrow focus constrains the range of encounters and opportunities available to South Korean professionals.

In Turkey, beyond the festival circuit, museums and cultural institutions offer year-round access to European cinema through curated programmes often sponsored or supported by European embassies and cultural institutes in the country. Key venues, including Istanbul Modern and Pera Museum, along with Sinematek/Sinema Evi, which hosts European Film Month and historical retrospectives, collaborate closely with partners such as the Institut Français, Goethe-Institut, Istituto Italiano,

Österreichisches Kulturforum, and *Il Cinema Ritrovato*. These institutions function as essential alternative exhibition spaces for arthouse films, including European titles, which have limited theatrical release. However, this model is financially fragile. Interviewees indicated that without continued and more funding from European sources, sustaining these screening programmes remains a significant challenge. In addition to supporting these institutional screening programmes, European embassies and cultural offices also actively present a variety of distinct film events to showcase their national cinemas. Prominent examples include the French Film Weeks organised by the Institut Français and the Week of Contemporary Italian Cinema curated by the Italian Cultural Institute. Similarly, the Goethe-Institut has established a significant tradition with the Kino festival. These diplomatic initiatives fill a critical void left by the commercial market, sustaining the circulation and visibility of European film culture in Turkey.

In common, despite the recognised strategic importance of film festivals and of diplomatic initiatives led by EU Delegations and EU Member States to support the six non-EU film ecosystems, the data also reveals an ad hoc approach that could gain from strategic rethinking—namely, focused on simplifying bureaucracy, expanding the focus and range of events, involving more institutions, reinforcing marketing budgets, and giving greater programming autonomy to local teams. Doing so would likely increase the salience of such local initiatives for audiences and film professionals and their impact on domestic film commercial circuits, thus reinforcing cultural diversity and, more broadly, shaping existing film markets.

CONCLUSION

The analysis confirms that the European film industry is perceived positively and that film professionals and stakeholders in the six countries surveyed have a desire for more sustained collaborations to support their projects and, concomitantly, the development of their film markets—building audiences and establishing new alliances between the EU and these non-EU markets to support the sustainability of their local film industries.

Film festivals foster community, support cultural diversity, and reinforce industry networking. However, high demand for further

EU-non-EU collaboration in this framework is not matched by corresponding support, and participation therein is limited by high costs, whereas the dissemination of European film is made difficult by high screen fees. This restricts not only opportunities for networking among European and non-European film professionals as well as the promotion of European film, but also audience development and, therefore, future market growth for both European and non-European film. Similarly, film events organised by embassies are seen as too narrow, underbudgeted, and ad hoc.

This overview reveals a mismatch between the high value given to European co-production markets, film festivals, and embassy events by non-European film professionals on the one hand, and the limited institutional and budgetary capacity to tap into the clear desire for stronger links between EU and non-EU film markets on the other hand. The review of the evidence reveals that current European film policy limits the potential development of further industry alliances and the growth of international audiences who enjoy European films. There is space for a more mission-oriented approach to the international dimension of European film policy, which sees the latter not only as an arena to promote European film but also as a long-term investment that creates new audiences and shared markets for the circulation of culturally diverse films, strengthening links and building audiences between European and non-European stakeholders in and through the audiovisual sector.

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Reimagining the Intricate Dance between Europe and South Africa: Filmmaker's Voices on the Persistent Inequities in Global Cultural Relations

Avril Joffe

INTRODUCTION

The South African Film industry has been in the news in 2025 for all the wrong reasons. Not because it tells uniquely African stories which are well received by people all across Africa and globally, or that locally and internationally produced films (104) released in South Africa (SA) is growing year-on-year, or because its total direct contribution to the South African economy has grown to R7,18 billion (NFVF, 2022). But rather, for its “cultural emergency” as described by the South African Screen Federation (SASFED) (Brederode, 2025). The Department of Trade, Industry and Competition (DTIC) is accused of inconsistent payouts from the rebate scheme which is meant to encourage foreign film productions to shoot in SA and stimulate co-productions. Why is this so important, and how does

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this reflect on broader discussions on cultural relations and international cultural cooperation? The difficulties of public film finance in SA inhibit producers from being able to benefit substantively from any partnerships with EU producers, film festivals or forms of European Union (henceforth EU) support. Without EU support for filmmaking in South Africa, the ability of SA films to be produced as co-productions and then released outside of SA is severely constrained.

EU support to filmmaking in the global South is deeply embedded in international cultural relations (ICR) and cultural cooperation—whether in the form of direct finance, development of co-production treaties, access to European broadcasting channels, attendance at European film festivals, or the showcasing of European films in these countries. While principles of mutual exchange and cooperation characterise Europe and the global South ICR, many challenges persist including limitations of finance, political instability and the persistence of power imbalances in the global world order.

EU support for filmmaking is part of a broader set of EU–Africa cultural relations, which is profoundly shaped by the legacy of colonialism and a persistent set of unequal power relations. These imbalances result in asymmetries in cultural production and knowledge which directly challenge the ability of the global South filmmakers to have voice and agency in these neocolonial conditions and dominance of Western institutions (Joffe & Magkou, 2025).

Equitable relations and forms of collaboration between Europe and Africa remain out of reach at the same time as there are competing interests on the African continent from China, Russia and South Korea (Joffe, 2023). While there are many studies that investigate EU support for audiovisual production and distribution (Akashoro, 2010; Dovey, 2015; Pearson, 2019, 2020; Pattison, 2015; Viñuela, 2018), the integration of film production and distribution in global media ecologies (Baltruschat, 2010; Drake, 2019; Parc, 2020), or about the practicalities of co-productions, distribution or domestic film industry dynamics (Collins, et al. 2019; NFVF, 2022; Saul, 2020; SACO, 2022; Tuomi, 2007; Tomaselli, 2013), there is an absence of literature foregrounding the perspective of film professionals in the global South of film cultural relations with Europe. There is also a dearth of literature that links film industry dynamics directly to its engagement in international cultural relations. This chapter provides an argument not only for how ICR can

promote the production and distribution of the SA film industry but how this could be achieved.

The core focus of this chapter is on how SA filmmakers perceive these international cultural relations—through the EU’s support to filmmaking in South Africa, the participation of filmmakers in European film festivals, the presence of European films in SA and the role played by co-productions. Understanding the SA context and these perceptions of filmmakers contributes to the literature on ICR and advances the field of cultural cooperation. It is not possible to separate cultural cooperation and support from geopolitical challenges (either in Europe or Africa or the rest of the world) or indeed decouple cultural cooperation from historical asymmetrical power relations shaped by colonialism (Heide, 2023). These unequal power relations make it vital that contemporary cultural cooperation be activated with principles of equity, fairness and social justice (Farinha et al., 2023).

The importance of culture is underscored in the EU’s strategic framework for its relationship with Africa where job creation and enhanced people-to-people connections are highlighted (European Commission, 2020). The role of the EU in respect of protecting and promoting cultural diversity, valorising Europe’s cultural heritage, supporting the creative sectors and industries and fostering cultural cooperation with the global South, remains significant, as demonstrated in the EU Work Plan for Culture (2023–2026).

Equitable cultural relations are impeded by the fragmented policy and regulatory landscapes of both the EU and SA which challenges the effectiveness of film support. On the European side, there is no single approach between Member States and the European Union, with the importance of the former in relation to film support being somewhat greater than that of the EU (Helly, 2020). Nonetheless, apart from co-production treaties signed with Member States (France, Germany, Ireland, Italy, UK), there are other EU-based forms of support for the audio visual sector such as ACP-EU Culture 2019–2026, projects funded by the EU National Institute of Culture (EUNIC) 2019–2025 and the 2021–2027 Global Europe funding for supporting international partnerships with sub Saharan African (SSA) countries. This fragmented European system creates difficulties for both policymakers at the EU level and indeed for film actors in the global South to engage effectively.

On the SA side, while there is a comprehensive system of governance for culture (Joffe et al., 2019) which enhances local content, attracts

international film productions and strengthens institutional capacity, fragmentation is also evident and filmmakers find the landscape confusing and overwhelming. The SA film ecosystem is governed by different departments, policies, institutions, funding and financial instruments as illustrated in Fig. 7.1.

Additionally, SA filmmakers are also cognisant of broader Africa-wide mandates and priorities such as the African Union (henceforth AU) Agenda 2063 which articulates the AU's view on pan-Africanism with culture as a key aspiration and driver of pan-African unity. It calls for "an Africa with a strong cultural identity, common heritage, shared values, and ethics" (African Union, 2015).

Throughout the interviews, filmmakers acknowledged the affordances of engagement and wished to enhance collaboration with European partners to gain more visibility and support for South African initiatives. However, these sentiments were not without qualification. Filmmakers demand that conditions of equity, respect and fairness attach to this engagement. As one stated: "If Europe wants to work with Africa, they need to work with Africa, not coming into Africa to tell us what to do" (Interviewee 9, Private Agency).

Procedural dominance and "narrative authority" ensures that administrative and aesthetic standards are imposed and stories are decided by others. As the interviews demonstrate, the very real challenge of structural inequalities and power dynamics are mentioned repeatedly by filmmakers since European cultural agencies appear to "shape the cultural output of the continent", which is "dangerously close to that of writing our narratives for us" (Oforiatta-Avim quoted in Heide, 2023). SA filmmakers report how the persistent inequities in these engagements and the agreements that stem from them can perpetuate global North–South cultural disparities—minority partner status in co-production agreements, unlikelihood of being able to initiate co-productions or attend European film festivals and network with collaborators and link these inequities to the struggle to secure sufficient funding at home and retain creative control. Filmmakers argue this practice hinders the development of a robust, vibrant and prosperous South African film industry.

In this way, despite numerous changes to the programmatic approaches and discourses of European cultural institutions away from colonial narratives of service and support to embody concepts of "multiculturalism", "bridge-building" and "cultural dialogue" (Paschalidis, 2009), global South filmmakers still face numerous challenges in these engagements

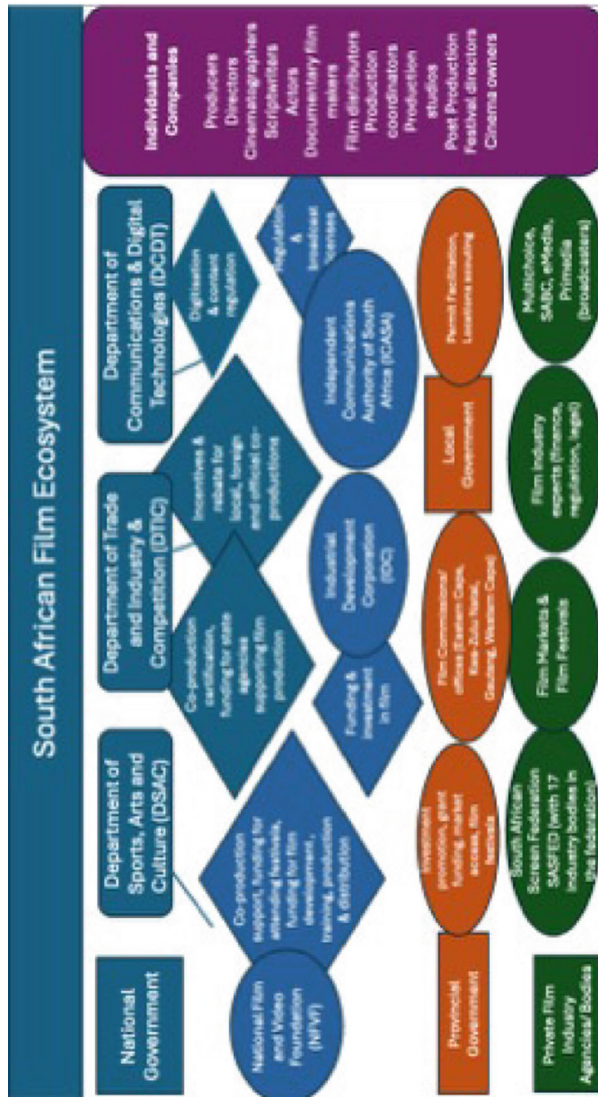


Fig. 7.1 The South African Film Support Ecosystem

with European partners. This makes the development of equitable partnerships urgent. Ultimately, escaping from this cycle of inequity and “narrative authority” requires a reimagining of engagements between Europe and South African filmmakers, especially in relation to co-production agreements and festival participation.

After outlining the methodology, this chapter has three sections. The first explores filmmakers’ understanding of the landscape for film, TV and documentary production in South Africa; the second examines the perceptions of the European film industry, co-productions with Europe and participation in film festivals, while the third concludes with recommendations that emerged from the research.

METHODOLOGY

The purpose of this research for REBOOT –Reviving, Boosting, Optimising and Transforming European Film Competitiveness, the Horizon Europe Project was to consider perceptions of the European Film Industry (EFI) in South Africa to assess the practices of South African filmmakers engaging with European film festivals, co-production treaties as well as EFI funding and other forms of support to South Africa. To reflect these complex and layered practices—or web of entanglements—of the global film production-distribution nexus, I interviewed 20 emerging and established South African film professionals (inclusive of long feature film, documentaries and television series) (producers, directors, scriptwriters, festival organisers) as well as industry support organisations (government and private) active in South Africa through a process of purposive sampling (starting with established filmmakers and support organisations). Attention was also paid to maintaining balance in terms of gender, age and experience across the value chain. The semi-structured interviews followed a defined script with follow-up questions and was administered between August and December 2024 after ethical approval was received by Erasmus University. Each interview was recorded and then transcribed.

Given the nature of the film and TV industry in South Africa, many filmmakers play multiple roles and cannot easily be differentiated; a film director can act at times as a producer and a scriptwriter while a private industry support organisation can produce, direct and write scripts while

one filmmaker is a production coordinator and an actress, and one producer is also a distributor. Of the 20 interviewees, only four indicated their principal role to be that of director; seven have industry support roles (five of whom work for government agencies); one indicated that documentary filmmaking was their sole area while six filmmakers were producers and two filmmakers are also scriptwriters.

My engagement in the film industry began with the development of a Cultural Industry Growth Strategy for the SA government in the 1990s after the democratic elections so that the epistemological stance taken is one that addresses persistent inequities using bottom-up evidence from filmmakers active in the SA industry in the post-Apartheid period. The combination of semi-structured interviews with an auto-ethnographic approach has much in common with Standpoint Theory, which as Cockburn states, recognises that “a plausible account of the world can be given from more than one positionality” (2020). This four-decade long engagement has allowed me to become witness to the multiple realities of film professionals’ experiences and perceptions of both the local industry and of European film support. While I relied on academic literature for background and grey literature to understand the current state of the respective film industries, the voices of SA film practitioners, professionals and industry agencies are central in this chapter.

Narrative analysis (Riessman, 2022) was used to identify key themes from the research. These are discussed in the three sections that follow. The landscape of film production (section 1) contains themes such as governance, audience, streaming platforms, regulatory support and finance challenges related to the rebate scheme. The perception of the European film industry (section 2) addresses themes relating to perceptions of the European film industry, challenges in international collaboration and specifically co-productions, filmmaker empowerment and equity, participation in international film festivals, creative freedom and African storytelling, and transparency and trust in African filmmaking. Section 3 includes conclusions and recommendations relating to EU partnerships and support as well as SA government’s funding and support to ensure filmmakers can engage equitably in international partnerships and curated engagement with their European counterparts.

The Landscape for Film, TV and Documentary Production in South African

In many respects the landscape of the broader film sector is robust and dynamic as is evident by the multiple institutions, policies, funding entities, legislation, regulations infrastructure (often privately funded but including cinemas and film studios). This comprehensive system of governance for culture is complemented by a vibrant production ecosystem, and member-based organisations and associations (see Fig. 7.1).

Filmmakers spoke less about these positive trends in the South African ecosystem and more about the fact that the South African film industry is currently facing a complex crisis: from changing trends in audience preferences and engagement, chronic underfunding, mismanagement and a lack of transparency at national government level, payment delays and poor accountability of the incentive and rebate scheme, significant barriers to entry for emerging filmmakers, distribution challenges and regulatory hurdles. Unathi Malunga, the CEO of SASFED summarises this cultural emergency in a social media post:

Across the cultural and creative industries, we are witnessing deep governance failures and systemic erosion of public institutions meant to serve artists, creatives and the broader public. These are not abstract governance concerns – they directly impact livelihoods, sustainability, and future sector growth (Malunga, 2025).

Local distribution is viewed by many as a real concern with government industry support agencies mentioning “limited options for distribution [of South African or European films] in South Africa, with most content [South African] going to MultiChoice and Netflix”. Many interviewees credited Netflix with opening opportunities for SA stories and making them viable for international audiences, particularly in the context of multilingual programming (Interviewee 8, National government official). Provincial agencies commented that since the 2008 broadcaster crisis resulting in fewer commissions, “If you do want to see a South African film, Netflix is the place to go” (Interviewee 6, Provincial government agency) while others said Netflix gave “filmmakers regular work” (Interviewee 11, Director/Producer/Scriptwriter). In speaking to the need to expand audiences for films, filmmakers said this is exactly what “Netflix has done: it is opened up our eyes to different kinds of movie making from very many different places that we might not have gone to see”

(Interviewee 11, Producer/Director/Scriptwriter). An interesting result of the presence of SA films on Netflix is that by improving familiarity with African content globally, “it’s been way easier at these international markets to have conversations about African content than it was before” (Interviewee 6, Provincial Agency). Another result, says the distributor, is that Netflix has attracted new audiences from the diaspora where the appetite “is quite large” (Interviewee 19, Producer/Distributor).

However, while both private industry support organisations and government agencies believe Netflix, as an “online company” (Interviewee 4, Provincial government agency), has positively influenced South African production growth by opening up diverse filmmaking opportunities and showcasing films that South Africans would typically not usually access, there has been criticism about poor quality and lack of access except by only a select group of companies (Interviewee 2, Producer). Filmmakers believe the benefits offered by Netflix override those of European support: “the film industry on the continent” is becoming “much stronger without Europe” (Interviewee 10, Provincial Agency).

Declining box office attendance related to safety considerations and lack of access (Interviewee 5, Producer) has been exacerbated by the decline of theatrical releases as well as to the rise of streaming services like Netflix, which were hugely boosted during COVID-19 (Interviewee 3, Private industry support). However, directors and producers commented that the SA film industry is well supported, arguing that “when films go into cinema, the audience do actually tend to go and watch films” (Interviewee 11, Director/Producer/Scriptwriter). This growing interest in diverse narratives and market for the types of creative work being produced, suggests a positive trend in audience engagement (Interviewee 11, Director, Producer, Scriptwriter).

THE INCENTIVE/REBATE SCHEME

In addition to a confusing governance system, there is much uncertainty surrounding current incentive programmes, with one seasoned filmmaker calling it “an absolute mess on an ongoing basis” (Interviewee 11, Director, Producer, and Scriptwriter). The current fractious policy environment over not only the incentive programme but persistent unequal access to opportunities resulted in an outcry from SASFED against the minister and the “nepotism and corruption” in his department (City Press, 2025). It causes concern and uncertainty among service industry

professionals and impacts their trust in the system. Producers feel defeated by the complexity of the DTI rebate system: “the DTI is one confusing platform. Honestly speaking, it really is such a difficult process ... it puts everybody off, really” (Interviewee 16, Producer/Director).

Specifically, filmmakers reported substantial delays in receiving rebates from the DTIC noting that “if you actually miss anything, when you submit it, you could wait another two years before you actually get that rebated amount” (Interviewee 16, Producer, director).

The industry, supported by SASFED, is frustrated by the delays in paying the incentives. “They are not paying the rebates which means countries have now stopped [coming]. They go elsewhere for rebates” (Interviewee 8, National Government Official). This lack of payment is an operational risk affecting the viability of the industry since rebates are crucial for financing future projects: “If the incentive and the rebate doesn’t pay, [...] for your next project, you don’t have the money to invest and put your skin in the game because you have to get the money, pay everything and get your bit as a producer so that for your next project, you then have the cash to put your skin in the game on the next project” (Interviewee 8, National Government Official). Government support is vital since without it “many co-productions would not be possible, as private sector investment is limited” (Interviewee 4, Provincial Agency).

Another more long-standing concern is the way the rebate was structured: it requires filmmakers to demonstrate their availability of cash flow (50%) to qualify (Interviewee 15, National Government Agency). This cashflow can be sourced—on a competitive basis—from a limited number of sources: the NFVF, film commissions or the Industrial Development Corporation (IDC). The rebate cash flow is crucial to filmmakers to “hold their own” in the co-productions and negotiate as equals. The time effort to “cobble together so many bits of money” is also exhausting to many filmmakers as there are no guarantees of success (Interviewee 17, National Government Agency). The word “cobble” was used often in relation to finance with a documentary filmmaker noting that financial constraints applied to both European and South African territories: “You’ve got to cobble together so many forms of finance. These just isn’t enough money in the system, not in our system, and not in their system” (Interviewee 7, Documentary Filmmaker).

These financial limitations directly translate to difficulties about retention of production rights and ability to be the majority producer (Interviewee 7, Documentary Filmmaker). Even when they find “people with

the same vision and ethical approach” this lack of majority shareholding translates to losing editorial control in telling an authentic South Africa story sensitively (Interviewee 18, Producer).

Finance complexities result in filmmakers having to hire in expertise to handle the co-production finance “just to make sure everything’s on track” (Interviewee 18, Producer). These finance difficulties are not helped by the entanglements in the local ecosystem: “You know, it’s just complicated for us who are already in a complicated space. Because of the deepening of incentive issues, the uncertainty, the people feeling that our incentives are unreliable” (Interviewee 18, Producer). Significant regulations limit production flexibility, such as the condition that 50% of physical photography must take place in South Africa. In this way, the rebate system impacts budget management adding to a complex and challenging number of legal environments: “you’re dealing with two legal environments, if not three, if you’re doing a three-way co production ... you know, it’s just complicated for us who are already in a complicated space” (Interviewee 18, Producer).

Film commissioners are also aware of the “laborious process of accessing rebates” (Interviewee 3, Provincial government agency) while industry bodies warn “the industry is facing a potential collapse, threatening thousands of livelihoods [....]. [W]ithout recent adjudication meetings, no projects are being greenlit, which stifles job creation and negatively impacts both the economy and the industry” (Broadcast Media Africa, 2025). These critical issues as well as the numerous attempts to engage DTIC on this matter are detailed in a memorandum to the Department of Trade and Competition (IPO, 2025). The memorandum suggests solutions in a “collaborative, rather than confrontational, engagement with the DTIC to foster industry growth and contribute to the nation’s social and economic development” (Ayanda Sibisi, interim secretary-general of IPO in Broadcast Media Africa, 2025).

In conclusion, the current fractious policy environment over not only the incentive programme but persistent unequal access to opportunities and a complex environment indicates “a need for systemic change” (Interviewee 3, Private Industry Expert). Attending these multiple challenges would enable filmmakers to escape from the cycle of inequity and “narrative authority” by strengthening the bargaining position of producers when entering international partnerships.

*The European Film Industry, Co-productions and Film Festivals:
Perceptions and Desire*

The interviewees view the European film industry positively citing its strong support systems and collaborative efforts among countries, which significantly benefit local European film ecosystems. The SA rebate challenges were compared to what is seen as more favourable in Europe; for example, the “realistic” rebates of 60–70% in the Basque County in Spain (Interviewee 11, Director, producer, scriptwriter). Several believed that European film is valued in its own territory: “I think European cinema trusts their films, trusts their stories”. This recognition, they suggest, is currently missing in the South African ecosystem (Interviewee 20, Director).

However, filmmakers believe this strong European ecosystem “could enhance support [for SA] through local presence, structured co-production deals, and investment in infrastructure” (Interviewee 4, Provincial Government Agency). They believe this would support the local film infrastructure and allow filmmakers to participate with greater equity with European partners, producers or broadcasters.

EUROPEAN FILM FESTIVALS

Attending film festivals in Europe is viewed as a vital opportunity to achieve visibility and prestige, for producers to network and secure future collaborations and indeed for filmmakers to receive valuable entrepreneurial guidance. European film festivals such as the International Film Festival Rotterdam (IFFR) and the Berlinale, European Film Market in Germany are vital for South African filmmakers with attendance considered a key area for support from the government industry bodies for film professionals to meet European producers, broadcasters and “sell their stuff” (Interviewee 15, National Government Agency). Film commissioners noted the importance of attending these festivals: “It’s the best way to meet potential collaborators, to know ... look them in the eye ... and see even their movies” (Interviewee 6, Provincial Government Agency).

All interviewees felt SA films should have a more substantial presence at international festivals to attract funding and co-production opportunities as this often translates into “structured support and formalised deals for co-production and skills transfer”, as a government support agency

explained. This is essential as many of these festivals have established funds applicable to global South filmmakers, for example the Hubert Bals Fund (Rotterdam Film Festival), the World Cinema Fund (Berlinale) and the Aide aux Cinémas du Monde or World Cinema Support (French Film Institute). These funds help filmmakers with international distribution platforms, international co-productions, foster collaboration and provide training. Filmmakers would like the threshold for entry to the festivals to be lowered to increase the possibility of accessing these soft funds (Interviewee 2, Producer).

Producers comment that there is a strong desire for South African representation in global markets beyond just festival appearances, indicating a need for ongoing relationships and visibility.

I think I do agree with having more presence, but at some stage, I think our presence then needs to translate to representation ...[and] allows us to be remembered even when we aren't in the room (Interviewee 19, Producer/Distributor).

Similarly, filmmakers bemoan the low presence of European movies in South African cinemas even though they are available on Netflix. A producer/director who is active in the European film festival circuit linked this to the demise of cinema houses in South Africa: South Africans only see European films “on channels like Netflix, because the Cinema Nouveau and the Ster Kinekors are also, you know, slowly dying down a little bit” (Interviewee 15, National Government Agency). South African filmmakers associate European films with art house movies (Interviewee 20, Director)—with one government industry support representative saying it’s “mostly your artistically creative sort of, you know, high end films that your Cinema Nouveau is a bit more open-minded, I would say” (Interviewee 15, National Government Agency). A filmmaker working in a private industry support agency believes there is “potential for a more diverse film festival that includes films from various countries, not just Europe” (interviewee 8, National Government Official).

However, attendance at European Film Festivals according to filmmakers is declining with some commenting it was mostly filmmakers themselves or younger filmmakers and students who attend, with festival organisers noticing “a lot of them are older people”. Additionally, they comment that integrating the European films into the South African

market “is a challenge” (Interviewee 16, Producer/Director). Nonetheless, the interest in European films remains strong among established filmmakers: “what has been good for me is being able to access Belgian and French and Nordic and Spanish and Portuguese TV series more than movies, more than anything else” (Interviewee 19, Producer/Distributor). It is clear that audiences need draw cards: “there are key filmmakers from Europe who have a very strong name ... So, if we at the festival were to programme ... the films by these big names, or a film that had won prizes at Cannes or the Oscars, then it would create interest” (Interviewee 9, Private Agency).

The appeal of the 11-year-old European Film Festival needs to be enhanced to reach a wider audience. As the European Delegation representative explained, despite the inclusion of a community programme to reach SA’s youth in addition to screenings in Johannesburg and Cape Town, “unfortunately, after we saw the report, we realised that we didn’t reach our goals” (Private communication).

The interest in European films is closely linked with an aspiration for skill enhancement and mentorship rather than mere consumption, indicating a desire for educational content (Interviewee 14, Director/Scriptwriter). Developing mentorship programmes that utilise local expertise rather than relying solely on mentors from outside the continent was supported by government:

All our programs have one-on-one mentors or group mentorships taking place. And when I came on four years ago, we noticed or I’ve noticed that we’re either using the same mentors or we are using, we’re looking to the north. And if you talk to labs and industry bodies on the continent, they always say to you that they have to look to the north to bring in mentors to work in the industry. We need to change that (Interviewee 8, National Government Official).

In conclusion, while filmmakers voiced their appreciation of European film festival support (workshops, training grants and residency programmes on script development, production funds and post-production), there is concern that this support can be “interpreted as a resurgent form of neocolonialism” (Pattison, 2015). Perceptions of high festival costs, lack of local funding support and inequitable access are core to how SA filmmakers view Europe: “It’s a conflict for us. You know, inequities are getting worse, actually. And the African filmmakers are

now trying to just work without Europe. Yeah” (Interviewee 9, Private Agency). Filmmakers echo Pattison who suggests that industry experts in the global North advise filmmakers from the global South in ways by which “the local” gets subsumed into “the universal” and by which “global south filmmakers have to write storylines about marginalisation” for the benefit of international views (Pattison, 2015).

Co-productions with Europe

As mentioned, South Africa has several co-production treaties in Europe with only two outside of Europe (Canada and New Zealand (2011). Co-productions are important not only for the finance they bring into South Africa but also for their support in terms of distribution and audience, with which many South African filmmakers struggle. As one industry expert explained: “It is that they are considered local content in multiple markets, improving distribution prospects and [with the] potential for recouping investments... The local content certification makes a broadcasting deal in the European territory more likely” (Interviewee 3, Industry Expert). Government agencies highlight the impact of co-production treaties on access to other vehicles that “require a partner to qualify” (Interviewee 6, Provincial Agency).

Since co-productions are often seen as too bureaucratic, many informal co-productions occur outside of the official treaties (Interviewee 6, Provincial agency). A key question to filmmakers was, therefore, why the focus on European co-productions? The cultural relations aspect was seen as powerful: “I think it’s all about the relations you can create with the EU based producers and connections and also just to be able to get it broadcast in other countries than South Africa. And also to be able to access an exchange of culture, I guess, as well as just an exchange of [the] dynamics of storytelling” (Interviewee 16, Producer/Director). The producer/director further explained that this was an “opportunity to gain recognition as a filmmaker [...].. it would set the bar very high for my status as a filmmaker” (Interviewee 16, Producer/Director).

Other filmmakers focused on the interest from European producers in South Africa’s “growing market and the potential for expansion” (Interviewee 3, Industry Expert). Key among the benefits is the visibility it gives local storytelling, the funds to create exceptional content, the ability to access financial incentives and additional rebates, and the

access to European broadcasters and distribution more broadly (Interviewee 19, Producer/Distributor). Writers and producers spoke about how collaborations with their European counterparts resulted in strong content achieved through teamwork in production, while also highlighting the relationship built with their fellow European filmmakers. A younger production coordinator explained that “working together to produce something that is going to be distributed locally on both ends” is incredibly helpful (Interviewee 12, Production Coordinator). This was supported by more established producers who spoke of respect for European filmmakers:

X [removed for anonymity] is brilliant. He knows how he wants to run his business. He knows he wants to own it. And he’s put in the long yards and he’s done it. And he’s got a brilliant team of writers, producers and creatives (Interviewee 9, Private Agency).

On the other hand, co-productions are seen as tough for young people and black people in the creative process (Interviewee 13, Producer/Cameraperson) where Africanness is not respected according to the more established filmmakers. This is why they “want to be able to target people of colour, people of African descent” for these co-productions (Interviewee 11, Director/Producer/Scriptwriter). Many voiced the opinion that the small African market for films exacerbated any existing inequities in these co-productions (Interviewee 11, Director/Producer/Scriptwriter).

Similarly, government industry support partners argue that the limits on co-production treaties, their complexity, and their bureaucracy necessitate formalised agreements for better collaboration. They also insist that treaties need to be updated to address industry trends—evident in the recent update to the co-production treaty between SA and France to include series and streaming platforms (Interviewee 17, National Government Agency).

The challenges faced by local filmmakers in applying for co-productions were repeated by many. For example, an established filmmaker who strongly believed a co-production would boost her status as a filmmaker confessed that she had tried to apply but “got lost in between the process of the forms. They just got a bit too much for me, specifically in the part where I needed to already have established the connection of an EU-based producer” (Interviewee 16, Producer/Director).

Moreover, co-productions are seen to favour European filmmakers over African filmmakers. As one government industry support partner explained, this is a constant fight: “the imbalances between Europe and Africa and the way African filmmakers are taken advantage of, especially in the co-production setting and where the structures in Europe have been set up so that the benefit goes to European filmmakers ... is the struggle and the fight that we are constantly in” (Interviewee 10, Director/Producer/Scriptwriter).

Industry experts were also vocal about the inequities in co-production agreements:

Money is invested and taken out of our country, our continent. IP is taken out of our continent. We are not being resourced. Our film industry is not being resourced because everything has to favour the Europeans. But it's our story [...]. This discussion, I know, has been happening for decades, but it's becoming more and more intensive now. And this is why filmmakers, African filmmakers, are just deciding to do things on their own (Interviewee 3, Industry Expert).

The widespread perception of imbalance in co-production arrangements, as explained by a film expert was one “where it favours Europeans” and has led to an acceleration of capacity building programmes such as mentorship by Africans for African filmmakers (such as the Future Mentors Guide and associated curriculum, (Durban Film Mart, 2023), but more significantly was the assessment of other available financing options. As this filmmaker explained, “there's been lots of shifts taking place over the last few years, where funding is now becoming available. Besides South Africa, which has the strongest funding support for the film industry, other countries and commercial entities, banks are coming on board too”.

These co-production challenges go beyond storytelling or partnerships. They point to the general difficulties in accessing finance from Europe (for example the ACP*Cultures+* and the ACP-EU programmes). These financial challenges also coincide with the trend for more readily available funding on the continent such as African funds for investments and equity for small, medium and large-sized creative industries (Afreximbank's film fund of US\$1 billion; African Development Bank, the Africa Culture Fund and Mastercard Foundation) as well as initiatives that provide market opportunities.

The Africa Film Financing Forum (AFFF) provides a curated platform for film professionals from countries such as Nigeria, Ghana, South Africa, Egypt, Kenya, Cameroon, Mali, Gabon and several others to learn how to secure financing and speak to financiers while closer to home is the Durban FilmMart, co-founded by the Durban International Film Festival and the City of Durban's Durban Film Office. It is a Pan-African meeting space for the continent and the diaspora to connect film professionals to share resources, exchange knowledge and build creative partnerships. A key outcome, says the DFMI director, Magdalene Reddy is that this "proud tradition of championing authentic African narratives and voices from across the continent ... connect different regions of Africa but also reach out to our diaspora and Global South communities, embodying our theme of building bridges through cinema" (Durban Film Mart Website).

Filmmakers have shown intent to pursue global South-South partnerships such as the fund created between the NFVF and Spicine, a Brazilian organisation to which both contributed equally. While "this was available to filmmakers, and they don't have to officially sign a treaty, they don't have to officially be part of the treaty to activate that fund". The increasing available funding and market opportunities on the continent also means that filmmakers have numerous options beyond Europe.

CONCLUSION AND RECOMMENDATIONS

This chapter has demonstrated structural inequities in EU-SA cultural relations which the fragile and complicated South African ecosystem amplify. The complex and confusing governance and funding system, distribution bottlenecks as well as the current challenges with the rebate scheme overshadows the audience appetite and increased visibility on streaming platforms in the local SA film industry. More structured support is needed to broaden the number of buyers of content, reduce reliance on grants and focus on theatrical distribution to build local audiences (Interviewee 4, Provincial government agency). The relationships with Europe are seen as both valuable and constraining while international industry shifts providing new options for financing, production and distribution.

European networks across the spectrum of film are being asked to facilitate better, more curated opportunities that offer meaningful connections between filmmakers while all European partners are being asked to deliver more horizontal, participatory collaborations to facilitate an exchange that truly reflects the dynamism of African film storytelling. Filmmakers spoke to “curated opportunities that facilitate meaningful connections” (Interviewee 7, Documentary Filmmaker) while insisting that European producers should attend more film festivals in South Africa to explore existing opportunities with more local filmmakers (Interviewee 18, Producer). Creative control in the hands of local filmmakers will ensure stories “resonate with audiences without relying on traditional gatekeepers” and stimulate future work since “developing relatable narratives for their upcoming projects” was key to success (Interviewee 11, Director/Producer/Scriptwriter). Government agencies focused on the need for regulatory support from the EU to bolster the local industry and “unlock funding schemes and improve trust between South African and European producers” (Interviewee 6, Provincial Agency). Co-production forums to facilitate collaboration between European and South African filmmakers should be continued at the NFVF “to support filmmakers in their engagements with European filmmakers” (Interviewee 6, Provincial Agency). Or, as a filmmaker suggested, “targeted conversations with much more targeted people. Fundamentally, I think that that is the key thing” (Interviewee 18, Producer). This should extend beyond co-productions and include more targeted support from European funders, partners and producers to enhance skills and resources in SA to leverage funding and distribution opportunities.

Filmmakers are seeking equitable partnerships that involve them in decision-making to unlock all the available schemes (Interviewee 6, Provincial Agency). Their call is clear: “work with us; include us as equitable partners. Let us sit at the table as an equal” (Interviewee 10, Director/Producer/Scriptwriter). Participating on equal terms in European co-production agreements will increase awareness among filmmakers about co-production treaties and available incentives; ensure co-productions focus on storytelling, facilitate co-production connections (about projects, possible EU-based producers or the financial intricacies of co-productions). The need for further support to get the concept behind a film to a point where it is “solidified” was also highlighted.

SA filmmakers recognise the need to better understand the macro and micro aspects of the industry particularly for those negotiating agreements with European partners. This is where more directed and structured co-production deals and investment from the EU was seen as important. Government agencies agree that “the EU could enhance support through local presence, structured co-production deals and investment in infrastructure [...] And you need to navigate this thing within the industry about knowledge of a bird’s eye view of the industry compared to knowledge of how you make a movie” (Interviewee 4, Provincial Agency).

SA filmmakers were also clear that the shortcomings in the SA policy environment need to be addressed; local film ecosystem need a more robust government marketing, distribution and capacity building strategies to widen the participation in co-productions, boost the global visibility of SA content, retain talent and improve the quality of local productions, enhance co-production models and support for local filmmakers through structured co-production agreements and regional film incentives.

Interviewees are clearly advocating for policy changes that provide more oversight and support for the film industry with the need for a stable and reliable incentive system to support co-productions in the film industry as critical. “We don’t have to race to the bottom. We have other aspects. We just need a stable, reliable incentive that works, and that works with co-productions” (Interviewee 10, Provincial Agency).

This policy change goes to the heart of filmmakers’ ability to be equal partners and “hold their own” in co-productions as, without funds, filmmakers cannot be equal partners let alone majority partners. Filmmakers were insistent on this point; they deemed this essential if authentic African stories are to be told. For this to be effective, policy change needs to include establishing effective distribution networks, investing in multilingual content to cater to diverse audiences and enhance international appeal, and continuing the engagement with international platforms to improve funding and accessibility for emerging filmmakers.

The intricate balance between artistic integrity and the practicalities of funding and production is overlaid by the desire to deliver a truly authentic African story and to facilitate more room for African voices in all aspects of filmmaking—producers, directors, cinematography, actors,

financiers, crew, cinemas. If we are to radically shift from a situation in which European funding priorities, co-production practices and other audiovisual organisational arrangements “shape local industries in ways that privilege Northern audiovisual textual norms and industrial practices” and continue to face “criticism of paternalism and even neocolonialism” (Pearson, 2019, vii) then the views of global South filmmakers need to be heard. Not only do European funders, producers and film festivals need to embrace such a radical shift that centres its part in global asymmetrical power relationships, but global South governments need to enable filmmakers to have the agency in these partnerships and engage in equitable ICR through clear governance, streamlined institutionalised support and consistent funding.

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PART III

Audiences and Global Film Market



CHAPTER 8

International Youth in Europe as Audiences of European Cinema

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INTRODUCTION

Film consumption is not a passive entertainment form but a dynamic space where identities are explored, affiliations tested, and cultural boundaries negotiated. This renders youth an essential demographic for understanding the evolving landscape of cinema, particularly within

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transnational contexts. Youth¹ engagement with film, as conceptualised using the meta-framework of *Personal Film Journeys* (Wessels et al., 2022)² is shaped by both individual development and broader socio-cultural dynamics. With this framework, film audiences can be understood as evolving processes rather than static categories. Audience categories unfold across the life course, shaped by changing personal circumstances, social relations, institutional contexts, and access to film provision. Rather than assuming that audiences are defined solely by demographic characteristics or fixed preferences, this framework highlights the ways in which engagement with film is active, relational, and responsive to broader cultural and structural conditions (Sellers Johnson, 2023).

At its core, the approach of *Personal Film Journeys* identifies six interrelated dimensions that trace the ways in which audiences develop their relationships with film: (1) *active introductions to film* (e.g., family, friends, or school), (2) *relationships with venues and platforms* (cinemas, festivals, streaming services, or digital platforms), (3) *education* (formal or informal exposure to film literacy), (4) *personal discovery* (self-motivated exploration of genres, directors, or international cinema), (5) *social environment and place* (influence of peer groups and geographic location), and (6) *changes in personal and social life* (life transitions such as moving to university or entering new social networks) (Wessels et al., 2022). Together, these dimensions frame film engagement as a process that is continually re-shaped across individual and collective experience.

Cross-cultural studies underscore cinema's pivotal role in shaping European adolescents' media engagement and identity formation, while also offering critical insights for cultural policy and film education initiatives. Film consumption among youth is not just a matter of taste but a site where multiple, hybrid identities (local, national, and transnational) are dynamically formed (García Canclini, 1995; Straubhaar, 2007; Soto-Sanfiel, et al., 2018). Yet, there exists a persisting trend: while youth acknowledge the difference between European and U.S. American

¹ The United Nations and the World Health Organisation describe *youth* as individuals between the ages of 15 to 24 years. This definition is primarily used for statistical and policy development purposes, but is widely accepted in international research (UNESCO, 2023; United Nations, 2013).

² A British Film Institute (BFI) and UK Arts and Humanities Research Council project (2017–2021) investigating how viewers interact with film across English regions.

cinema, they favour the latter, often perceiving national films as inferior. This finding signals a negative attitude towards the films of their own countries and highlights the urgent need for tailored educational interventions (Soto-Sanfiel et al., 2018).

The gap between adolescents' consumption preference for Hollywood and their comparatively limited engagement with national or European cinema invites deeper reflection on the cultural role and positioning of European film. Responding meaningfully to youth preferences requires not only measures, such as strengthening film literacy, but also situating European cinema within its broader cultural and institutional context. In this sense, European cinema should be understood not merely in market terms but also as a deeper and continuous cultural project distinct from Hollywood's market focused principles. Hollywood serves as the object of investigation here precisely because it remains a dominant force in the international film industry (Moody, 2017). As Elsaesser (2005) compellingly argues, European cinema represents the twentieth century's most precious cultural memory, whose preservation is driven not by nostalgia but by "an ethical impulse" tied to public value and institutional support. This conceptualisation of cinema as both a cultural project and a policy instrument foregrounds the significance of cultural and audiovisual policy frameworks such as Eurimages and the MEDIA programme, which aim to sustain the aesthetic diversity and cultural heritage of European film through intentional policy intervention.

Youth are active cultural agents within this process whose engagement is shaped by emotional resonance, social relevance, and digital accessibility. Understanding *international* youth engagement with European cinema is also vital not only for the aim of audience development, but also, importantly, for shaping the future trajectory of local, European and indeed global and regional film industries outside the Hollywood 'regime'. One of the ways in which to understand some aspects of the Hollywood appeal is the concept of *cultural discount*. Culturally specific media lose value or appeal in international contexts, was first articulated by Hoskins and Mirus (1988). More recent studies continue to validate this effect across different cultural flows. For instance, Xie et al. (2025) analyses how producers, cultural specificity, communication pathways, and audience decoding jointly shape the cultural discount of Chinese films in transcultural contexts. Similarly, Kang et al. (2023) demonstrates that review divergences between domestic and foreign audiences heighten the cultural discount for Hollywood blockbusters in China, although cultural

capital and linguistic familiarity can partially offset this effect. This reflects the difficulty such films face in transcending cultural boundaries and appealing to global audiences. This “discount” is not merely a matter of economic viability, but also raises deeper concerns about the translatability and relevance of cultural narratives across diverse viewer contexts. In the European context, this provokes a critical line of inquiry: how does European cinema, with its emphasis on cultural specificity, artistic experimentation, and often politically charged storytelling, resonate with young international residents living within the EU? These individuals occupy a unique cultural intersection, physically situated within Europe yet socially and emotionally linked to multiple cultural identities. Are they seeking out European films, and if so, how do they interpret the values and ideologies, such as diversity, social justice, and freedom, encoded in many of them? This chapter explores this terrain by examining film consumption behaviours of international youth, living in the European territory, including the platforms they use, their frequency of engagement, and their channels for film discovery and recommendation. An exploratory survey was conducted with 79 non-EU citizens residing in the EU (aged 18–30), living across the EU member states Austria, Spain, Germany, France, and the Netherlands. It explored their film consumption patterns, perceptions of European cinema, values and representational diversity, as well as their channels of discovery and preferred modes of access. To contextualise these findings, we draw on the award-winning European film *Anatomy of a Fall* (2023) as a shared reference that can illustrate the ways in which international audiences interpret and emotionally connect with European cinema. By combining a targeted literature review with exploratory survey data, the chapter aims to provide both theoretical and empirical insights into the ways in which European cinema is negotiated by young, globally mobile audiences who have first hand living experience of forms of European cultures through their residency within the EU. In doing so, it highlights both the cultural strengths and structural limitations of European cinema, while identifying opportunities for policy and industry to engage this growing demographic better. Although not representative, the survey offers highlights as an explorative investigation into trends and reflections on these dimensions, through the means of a common reference. While diversity metrics and policy responses have gained traction globally, much of the literature centres on U.S.-based contexts or focuses on national demographics within Europe. Far less attention has been paid to the ways in which Europe’s non-EU youth audiences, who navigate

multiple cultural identities, respond to these representational dynamics in European cinema. Given their growing numbers and cultural presence, understanding these audiences' perceptions is both a cultural and policy imperative. It is against this backdrop that this chapter explores how young international residents in the EU engage with the themes of diversity, representation, and cultural relevance in European films.

YOUTH AND 'CULTURAL DISCOUNT' CINEMA

In theorising the ways in which youth perceive films, it becomes evident that they bring with them intuitive cognitive frameworks, or "intuitive theories" (McCloskey, 1983), that guide their interpretations and evaluations. These theories recognise that youth do reason about film much like more experienced viewers, despite differences in exposure and expertise. Young audiences assess films through an interplay of genre expectations, narrative structure, and creative decisions, with these judgments being highly shaped by their anticipations (Halverson et al., 2012). When a film meets these expectations, it typically receives positive appraisal; when expectations and experience fail to align, youth may respond negatively. The same work helps us understand that some mismatches are "deal breakers," while others become "rule breakers," creative departures that enhance a film's uniqueness and value. Through this lens, youth regard films in terms of familiarity and innovation: they perceive credibility from alignment with familiar narrative cues and genres, and the presence of innovation through unique, standout elements signals distinctiveness.

Beyond consumption, youth are also active cultural agents, using film as a medium for inserting personal meaning and navigating social realities through creative production. Youth-produced films, such as *Rules of Engagement* reveal the ways in which young creators construct viable social identities via the "interactions among filmic elements," particularly within "the transition spaces between phases of the film" (Halverson, 2010, pp. 2352–2353). These moments allow youth to express how they see themselves, how they feel perceived by others, and how they relate to their communities. Viewed this way, film becomes a multi-modal literacy practice—one that fosters identity development, especially for those marginalised in traditional institutional settings. For such youth, media creation becomes not only expressive but emancipatory: a critical alternative space for exploring a positive sense of self and asserting agency in shaping their own narratives.

Comparative evidence across Hollywood, Bollywood, and the European film industry suggests that youth audiences share an interest in relatable and inspirational narratives but differ significantly in modes of access and motivations for engagement (Mohanty et al., 2023; Sarikakis et al., 2026; Soto-Sanfiel & Angulo-Brunet, 2020, and Center for Scholars & Storytellers, 2024). This is often shaped by their unique socio-economic, cultural, and technological contexts (Sarikakis et al., 2025). For example, while U.S. youth maintain cinema-going as a social event, Indian and Nigerian youth predominantly access film through digital platforms, highlighting affordability, cultural reflection, or Western allure. European youth, in contrast, express a preference for Hollywood blockbusters despite acknowledging the artistic quality of their national cinema, revealing a perception gap rather than a content deficiency (Soto-Sanfiel et al., 2016). These insights call for a reimagining of the European film sector that embraces participatory storytelling, diverse representation, and digital innovation. To enhance competitiveness and redefine global cultural footprint, the EFI must centre international youth perspectives, recognising their role as cultural participants and responding to their desires for authenticity, inspiration, and relevance in both policy and practice.

This demographic straddles multiple cultural registers, offering a unique lens on how films circulate meaning across borders. When non-Hollywood cinemas face a ‘cultural discount’ (Hoskins & Mirus, 1988), it is not merely a market issue but a cultural one, raising questions about resonance, representation, and inclusivity. Thus, the present research investigates how young international audiences within Europe navigate, access, and interpret European cinema, probing both their patterns of engagement and the socio-cultural meanings they derive. By doing so, this chapter aims to contribute to both film theory and cultural policy, offering insights that can bridge creative expression and institutional strategy in a rapidly globalising audiovisual ecosystem.

While young international audiences navigate and interpret European films, there are important structural and institutional forces that shape those encounters. European film studies have increasingly questioned the adequacy of the “national cinema” model in an era defined by global flows and hybrid identities. Scholars call for a shift beyond this framework, highlighting the need to foreground Europe’s migration histories and critique the persistence of Western-centric perspectives that risk marginalising Central and Eastern European voices (Bergfelder, 2005). As national

frameworks erode, what emerges is a post-national cinematic discourse, what Elsaesser terms “mirror-relations and forms of othering” (Elsaesser, 2005), no longer simply oppositional to Hollywood, but characterised by “cohabitation, mutual interference and mutual responsibility” (Elsaesser, 2005). In this evolving landscape, cinema becomes a site where cultural diplomacy, supranational ambitions, and identity negotiation intersect.

It is vital to critique the simplistic notion of the Hollywood film industry as a cultural invader, instead portraying the relationship as one of “asymmetrical but dynamic” exchange, in which European cinema defines itself “face to face with Hollywood,” not in isolation but through productive dependency (Elsaesser, 2005). In this role, cinema functions as a key arena where questions of national identity, cross-border cultural influence, and broader European aspirations converge. While Hollywood represents a major segment of American cinema through commercially produced blockbuster films, European cinema is known for the presence of creative authorship, cultural richness, and social authenticity in relation to the influences of Hollywood and American cinema (Meir, 2021), positioning these qualities as distinctions that have emerged from an interconnected global film industry.

Although European cinema positions itself as a site of artistic innovation and cultural richness, its reception, particularly among younger and international audiences, remains fraught with challenges. This dissonance brings into sharper relief the notion of European cinema as a form of *cultural discount* cinema. While rich in diversity and auteur-driven storytelling, it often struggles to overcome the structural and perceptual hurdles that limit its visibility and impact. Budget constraints, a franchise-driven exhibition landscape, and limited marketing significantly diminish young viewers’ exposure to European films (Jones, 2024a, 2024b; Lewis & Canning, 2020). Moreover, Jones (2016) observes that European films occupy only a marginal share of the UK box office, largely due to language barriers and the perception that non-Hollywood films are less relatable or engaging. In Anglophone markets, especially, where English-language blockbusters dominate theatrical programming, European films—often subtitled or dubbed—face both access and appeal issues. Thus, despite its aspirations to define itself in constructive relation to Hollywood, European cinema remains hindered by systemic limitations and entrenched audience biases. Yet, such structural challenges do not entirely preclude the international success of European cinema. In

fact, various creative, institutional, and technological forces are working to offset this cultural discount.

These market dynamics stand in stark contrast to the highly centralised creative and market, and distribution control exercised by US Hollywood studios. One of the most notable differences between European cinema and Hollywood is that European movie directors have more creative control, whereas producers and the studio have the majority of the control in making American movies in Hollywood (Madsen, 2001). This creative control influences several aspects, from scriptwriting to market distribution, and further drives narratives of a commercialised American film industry stemming from Hollywood dominance, resulting in the European film industry acting as Hollywood's artistic counterpart (Kau, 2001). Hollywood and Europe further differ in their target audiences. A study by Walls and McKenzie finds that between 2000 and 2009, international revenues of Hollywood films doubled as studios started accommodating international audiences by changing attributes in films to culturally cater to the international market (Walls & McKenzie, 2012).

RESISTING THE DISCOUNT: INTERNATIONAL RECOGNITION AND INSTITUTIONAL SUPPORT

Despite these structural disadvantages, non-Hollywood films increasingly find artistic success on the global stage, driven by a growing audience appetite for diverse and international cinematic perspectives. This is evident in films like the Hungarian historical drama *Son of Saul* (2015), directed by László Nemes, which won 65 awards, including the Academy Award for Best Foreign Language Film. Similarly, South Korea's *Parasite* (2019) made history by becoming the first foreign-language film to win Best Picture, while also securing the award for Best Original Screenplay at the 2019 Academy Awards (IMDb, 2016, 2020). More recently, the French production *Anatomy of a Fall* won the 2023 Palme d'Or at Cannes Film Festival and earned Justine Triet and Arthur Harari the Academy Award for Best Original Screenplay at the 96th ceremony (IMDb, 2023). European film festivals of global repute, such as the Berlin Film Festival, Cannes Film Festival, and Venice Film Festival, continue to serve as essential global cultural platforms. They provide exposure for films outside dominant commercial circuits, connecting European auteurs with international and niche audiences (de Valck, 2007). Complementing the prestige of these festivals, the EU have also taken part

in implementing efforts to support the development, promotion, and cross-border distribution of European audiovisual works, bolstering their visibility and market access worldwide through institutional efforts such as the Creative Europe MEDIA programme (European Commission, 2021).

Parallely, the digital transformation of the film landscape has created new pathways for discovery. The rise of online streaming services has fundamentally altered production and distribution models (Hadida et al., 2021), a transformation accelerated by the COVID-19 pandemic as home viewing supplanted cinema attendance (Weaving et al., 2020). The unparalleled convenience of Subscription Video On Demand (SVOD), access anywhere, on any device, has driven strong engagement levels (Camilleri & Falzon, 2021; Sarikakis et al., 2025). Despite this shift, theatrical cinema still holds cultural significance. European theatres reported an 18.3% rebound in admissions in 2023 (European Audiovisual Observatory, 2023), although audiences now demand superior in-theatre experiences, in pricing, comfort, and amenities to draw them back (Batlle-Beltrán & Mateo, 2022).

Beyond access and attendance, on-screen representation shapes the ways in which viewers can relate to films. An important dimension in this process is the degree of diversity of characters, stories and creators. Cultural diversity is understood to be the sum of ethnic, racial, or cultural differences and their intersections with gender and sexuality (Siapera, 2010). In 2014, only 17 of the top 100 global releases featured a lead or co-lead actor from an underrepresented racial or ethnic group (Smith et al., 2016). A study focused on Hollywood confirms that diversity has greatly improved since the last decade, and that the rate at which viewers see women on screen has steadily increased from 25% between 1980 and 2010 to around 40% in 2022 (Bamman et al., 2024). Additionally, Netflix's 2018–2019 diversity report shows the US leading the industry in on-screen inclusion (Asmar et al., 2023).

However, this upwards trend is not guaranteed to continue given the emergence of anti-diversity policies in state policies across the US as well as the proliferation of anti-intellectual and anti-inclusion rhetoric in parts of the world, including Europe, due to the global influence of autocratic political regimes. These conditions highlight the importance of diverse cinematic perspectives beyond mainstream narratives. Although Hollywood dominates global box offices, European cinema offers an auteur-driven, culturally rich counterpoint, yet we know little about how non-EU citizens in the Union actually engage with films.

With 29 million non-EU citizens in the Union (European Commission, 2024), understanding their European film consumption has real cultural and commercial stakes.

EXPLORING PERCEPTIONS OF INTERNATIONAL YOUTH

To explore international youth audiences' engagement with European cinema, this study sought to explore: (1) whether non-EU youth residing in the Union actively seek out European films; (2) how they interpret cultural values, identities, and ideologies embedded within them; and (3) what platforms, social networks, and informal channels shape their access and engagement with these films.

The film *Anatomy of a Fall* (2023) serves as a cultural text that encapsulates many of the dynamics discussed, ranging from cross-border resonance and emotional complexity to linguistic hybridity and European legal identity. Its narrative follows two characters from Germany and France, the two historically main drivers of the European integration process also representing two of the largest film markets in Europe, communicating in their shared working language (English), which reflects the linguistic negotiations commonly found in transnational European contexts. Set in a chalet in the French Alps, the film depicts the French legal system through courtroom proceedings, offering audiences a vantage point on European identity, intimacy, and representation, as well as on institutions, cross-cultural complexity, and justice. The film was praised for its linguistic challenge and intense character work, highlighting Justine Triet's dual role as co-writer and hands-on editor (IMDb, 2023; Triet, 2023).

The film served as a contextual reference point for this research, forming the basis of an online survey. Participants began the online survey with an informed-consent screen outlining the study's purpose, voluntary participation, and confidentiality safeguards. We recruited 79 eligible non-EU citizens (aged 18–30, all residing in an EU member state) via convenience and snowball sampling, distributing the survey link through university group chats, social media, and campus posters in Vienna, Austria. We asked participants whether they had watched *Anatomy of a Fall* as a foundational question. Since only 17% had viewed the full film, participants were shown clips before answering; findings on *Anatomy of a Fall* therefore reflect clip-based impressions rather than full viewing experience. *Anatomy of a Fall* was also used as a contextual reference point

to interpret the findings, given its distinct representation of its European identity in contemporary cinema.

Just over half of the respondents (54%), were students who had lived in the EU for 1–5 years, primarily in Austria, Spain, Ireland, Germany, France, Italy, or the Netherlands. Ages clustered at 21–25, with a mean of 24.4; gender was approximately balanced (50% male, 46% female, 4% other). Furthermore, a majority of participants held citizenship from countries outside the EU and EEA (72%), the largest groups being from Asian, Russian, and Israeli backgrounds. Participants aged 21–25 formed the core demographic, comprising 60.2% of the sample, followed by those aged 26–30 at 34.4%, and a smaller subset aged 18–20 at 5.4%. This clustering reflects the dynamics of the digital nomad communities whose mobility and film engagement patterns are central to this study. These age trends suggest that our sample captures a transitional life stage characterised by increasing autonomy and cultural curiosity, factors that may influence openness to subtitled content, experimentation with platforms, and peer-driven film discovery.

TRANSNATIONAL AFFINITY THROUGH EMOTION, AESTHETICS, AND SOCIAL NETWORKS

Responses demonstrate that international youth engagement with European cinema is driven not just by content exposure but also by a multilayered process involving emotional resonance, aesthetic appeal, and peer-mediated access. The survey revealed ambivalent perceptions of diversity in contemporary European cinema. Despite 79% of respondents favouring Asian cinema overall, 61.5% still expressed a strong affinity for European films. This suggests that, beyond market dominance, European cinema's interpersonal depth and arthouse style offer something uniquely resonant. Taking *Anatomy of a Fall* as a contextual anchor here, participants characterised the film as distinctly European, realistic, and socially relevant, emphasising its focus on facial expressions, dialogue, and psychological tension rather than spectacle or humor. They perceived it as a serious, thought-provoking narrative marked by gender diversity and moral complexity.

Participants noted gender equality as one of the European values (61.5%). However, complete representation remains a barrier. Despite identifying with European values like education (64%), freedom (55%), and gender equality (61%), participants reported ambivalent perceptions

regarding racial (16%) and religious (25%) representation. Responses regarding the association of European values with religious and ethnic diversity averaged a neutral 3 out of 5 (with 43.2% and 44.8% selecting neutral, respectively), reflecting participants' perception of how diversity is represented through European cinema in general. These middling evaluations suggest a disconnect between the cultural narratives presented on screen and the lived identities of international viewers. This lack of representational depth may hinder emotional resonance and sustained engagement, limiting the effectiveness of EU investments in cross-border co-productions, subtitling, and catalogue quotas. These evaluations do not necessarily indicate outright rejection, but they suggest that diversity and religion are not strongly resonant in the films participants encounter. Addressing this through more inclusive storytelling could further enhance the emotional relevance of these films.

These reactions unveil the ways in which young viewers do not passively consume film but actively interpret it through the lens of identity formation and emotional investment. Participants' recognition that the film relied on close-up shots (65.2%), engaged with social issues (54.5%), and reflected the value of freedom (54.5%) suggests that they map their own cross-cultural and introspective experiences onto the cinematic space. This aligns with the Personal Film Journey framework (Wessels et al., 2022), which conceptualises film reception as part of an individual's evolving life narrative. In this sense, *Anatomy of a Fall* exemplifies how European cinema can serve not as distant cultural material but as a medium for reflective, personally transformative engagement among young audiences.

Respondents also tell us about the discovery and recommendation of films in general. Results from the survey suggest a heavy reliance on peer networks, with 77.5% citing friends and family and 70% social media as key influences for the discovery of films. This social dimension turns solitary SVOD use into communal rituals, especially among Erasmus students and digital nomads. Viewing is often co-experienced, whether at campus screenings, watch parties, or through shared streaming, which reinforces the emotional and cultural value of the films. Co-viewing, whether physically together or "co-connected" (watching simultaneously from different locations), becomes a site where meanings are negotiated and emotions are shared (Pittman & Tefertiller, 2015). Also, it has been noted that algorithmic and social influences are deeply intertwined: recommender systems increasingly emulate social cues (such as peer recommendations

or trending lists), giving users a sense of social validation (Weidhaas et al., 2021).

Additionally, genre emerges as a strategic lever. Participants' strong preference for action (65%), comedy (72.5%), and drama (47.5%) points to an opportunity: European cinema, while maintaining its auteur integrity, could diversify genres to broaden reach. As with Korean cinema's genre-fluid appeal, exemplified by award-winning titles such as *Son of Saul* (IMDb, 2016) and *Parasite* (IMDb, 2020), European films can remain thematically rich while becoming more accessible.

Finally, the role of festivals and policy institutions like Creative Europe MEDIA remains essential. While nearly 40% of participants attended a festival or film event in the past year, more grassroots efforts, such as pop-up screenings or student-led film circuits, are needed to deepen youth engagement. These initiatives, combined with a more strategic use of digital platforms and subtitled accessibility, could enable European cinema to both retain its cultural identity and increase global resonance.

IMPLICATIONS FOR FILM POLICY, INDUSTRY STRATEGY, AND FUTURE RESEARCH

The participants' perception of *Anatomy of a Fall* as realistic, socially relevant, and distinctly European reflects what Thomas Elsaesser (2005) conceptualises as the ethical impulse of European cinema—its sustained negotiation between art, authorship, and moral responsibility. Viewers' emphasis on realism, close attention to faces, and recognition of gender diversity suggest an engagement with the film's psychological and ethical depth rather than its entertainment value.

Anatomy of a Fall won the European University Film Award (EUFA)³ 2023, as it resonated deeply with young audiences through its intellectually engaging narrative, moral ambiguity, and exploration of truth, perception, and identity. Also, the interest of youth in the film's nuanced characters and complex emotional arcs underscores how European arthouse films can act as *bridges for intercultural communication*, resonating across demographic divides. Yet, as the theory of Personal Film Journeys

³ European Film Academy. (2023, December). Congratulations! *Anatomy of a Fall* wins the European University Film Award (EUFA) 2023 [Press release]. <https://www.europeanfilmacademy.org/press/congratulations-anatomy-of-a-fall-wins-the-european-university-film-award-eufa-2023>

(Wessels, 2023) reminds us, such engagement is not just about content but also about the *process of meaning-making*, shaped by how youth negotiate personal identity within wider social and cultural structures. However, the success of a single title highlights, but does not resolve, the broader issue: European cinema must diversify its narrative perspectives to reflect a wider range of youth experiences, including those of international and transnational audiences. It has been concluded that European cinema policies and film-literacy programs must account for cultural and generational differences to effectively engage young audiences (Soto-Sanfiel et al., 2021). Digital distribution can act as a complementary, not substitutive, model within the European film ecosystem. However, without policy coordination and support for small distributors and art-house cinemas, new channels alone will not ensure true narrative and cultural diversity (Paris, 2015).

This urgency is magnified by the ways in which film watching functions today: not as isolated consumption but as a *social activity embedded in peer networks*, a trend affirmed by our findings and supported by *cultural agent* theories (Sarikakis et al., 2025). In this context, friend networks collectively perform a decentralized gatekeeping function, separating worthy from unworthy information for each individual (Li et al., 2020). Adolescents' developing social-emotional brain systems heighten responsiveness to peer approval within user-generated and shared media environments. As a result, practices such as co-viewing, sharing, and online discussion transform media consumption into a socially embedded, peer-regulated activity (Crone & Konijn, 2018). Together, these dynamics reveal that contemporary film engagement, particularly among youth, operates as a collective meaning-making process, where social validation, peer interaction, and networked exchange shape not only what is watched but also how cultural value and relevance are constructed. This aligns with *intuitive theory frameworks* (Halverson et al., 2012), which show how young viewers use informal but structured criteria (in this context: genre, theme, and emotional tone) to assess and value films. In this light, a sociable and globally oriented film marketing strategy is not a luxury but a necessity. Expanding digital access and leveraging social media would not only increase visibility but also support *reportability*: making European films stand out in a saturated media landscape by emphasising unique storytelling and cultural relevance.

The REBOOT report substantiates that genre diversification and narrative variety are central to strengthening European cinema's global

competitiveness without undermining its artistic integrity. It reveals that *film professionals themselves* view “innovative storytelling and diverse content” as a core strength of the European Film Industry, equating creative pluralism with market appeal (Fernandes, Vlassis, Bissot, & Houard, 2025). Beyond mere access, sustained interest in European films can be amplified through *genre diversification*, a strategy that does not dilute the thematic and stylistic integrity of European cinema but rather extends its emotional and narrative reach. According to the frameworks of *intuitive theory* (Halverson et al., 2012), youth evaluate media through anticipatory structures, which in this context, make genre a powerful entry point.

Films can increase both credibility and emotional impact when these expectations are met or creatively challenged. This is especially important for *transnational youth* navigating identity through cultural media. As shown in our findings and supported by the *Personal Film Journeys* model (Wessels, 2023), cinema becomes a site for identity affirmation, where characters and stories that reflect their hybrid realities can foster deeper emotional engagement. The *cultural discount theory* (Hoskins & Mirus, 1988) helps explain the reasons why Asian films currently enjoy higher resonance; they often combine emotional intensity, genre innovation, and social realism in ways that are both culturally specific and globally appealing. European films’ structural dependence on festival-oriented funding systems, coupled with insufficient attention to emotional accessibility and audience diversity, reinforces the stereotype of European cinema as “high-brow” and detached from popular audiences (Mitrić & Kolarić, 2023). Their framework implies that greater balance between artistic ambition and audience design, achieved through emotional, narrative, and genre diversification—could strengthen European cinema’s relevance and counter perceptions of elitism.

One strategy to counteract this is through *youth-centred cultural participation*. Film festivals and events serve as key *affective spaces* where meaning-making happens interactively (de Valck, 2007). These are not just sites of consumption but of dialogue, where young people can directly engage with creators and the institutions behind them. This aligns with Halverson’s (2010) concept of *media as multimodal literacy practice*, where young audiences, especially those marginalised in traditional settings, can explore identity and agency. Promoting *diversity on-screen* and ensuring that these values are represented in festival programming

sends a powerful signal: that European values are not static, but evolving and inclusive.

This exploratory study provides valuable insights into the perceptions and film consumption habits of young, international audiences in the EU. Our focus on non-EU youth offers a unique outsider within lens on European cinema, illuminating how transnational viewers engage with narratives shaped by different cultural codes. However, emotional resonance, peer-mediated discovery, and platform accessibility suggest that the cultural discount (Hoskins & Mirus, 1988) is not fixed but negotiable through affective depth and narrative credibility. This further underscores the importance of examining how intuitive film literacy and genre fluency vary across cultural groups, with implications for marketing and distribution strategies.⁴

These findings underscore the need for more nuanced research into how marketing, narrative tone, and emotional architecture shape young audiences' engagement with European cinema. Future studies should employ qualitative approaches—such as interviews and focus groups—to unpack the interpretive reasoning behind viewing choices and to explore how film engagement functions as a space for identity formation, social connection, and cultural agency among diverse youth demographics.⁵

CONCLUSION

This chapter set out to examine how international youth living in the EU engage with European cinema, focusing on their film preferences, discovery habits, emotional responses, and perceptions of diversity and representation. Using an exploratory survey of 79 participants aged 18–30, and anchored by the film: *Anatomy of a Fall* (2023), the study probed

⁴ Our sample was small ($n = 79$), recruited only in Vienna, and limited to non-EU international youth, which constrains the generalisability of the findings. A comparative analysis with EU-born youth could reveal how cultural discount, narrative fluency, and genre preferences differ depending on cultural familiarity or local exposure.

⁵ We primarily used frequency and perception-based metrics. Future research should investigate co-productions' effects on relatability, the influence of platform algorithms (e.g., Netflix vs. MUBI), and genre hybridity in shaping appeal. These elements align with Halverson's (2010) view of media as a multimodal literacy practice and Sarikakis et al.'s (2025) framework of youth as active cultural agents.

both the appeal and limitations of European cinema from the perspective of globally mobile, non-EU citizens. Our goal was to understand not only what young people watch, but *why* they do so, exploring the deeper cultural, emotional, and social logics that guide their engagement.

While theories like Cultural Discount (Hoskins & Mirus, 1988) and Personal Film Journeys (Wessels et al., 2022) provide a useful entry point for understanding barriers to transnational film reception, our survey-based insights go further by incorporating frameworks of emotional affinity, intuitive film literacy, and peer-mediated discovery. These findings suggest that cultural distance is not a fixed barrier but one that can be mitigated (or reinforced) through shared affective experiences, recommendation networks, and platform accessibility. Distributors and policymakers can use this knowledge to develop more targeted strategies, such as curated streaming playlists co-designed with university film clubs, or subtitling and promotion campaigns that foreground diverse narratives. Ultimately, our research shows that cinema functions not only as a commercial product but as a site for cultivating cultural belonging and cross-border dialogue among migrant and international populations and suggests that this offers an untapped opportunity to European policymakers.

Through this lens, the chapter extended beyond traditional cultural discount explanations (Hoskins & Mirus, 1988), incorporating contemporary frameworks such as the *Personal Film Journeys* model (Wessels, 2023) and *intuitive theory* (Halverson et al., 2012; McCloskey, 1983). These perspectives revealed that young audiences do not simply passively consume media—they actively interpret, negotiate, and co-create meaning. Emotional resonance, peer networks, and digital accessibility emerged as key drivers of engagement. In particular, respondents highlighted European films' distinctive aesthetic, moral ambiguity, and artistic realism as appealing, yet also noted barriers linked to genre, marketing, and on-screen representation.

The study concluded that while there is a solid foundation of interest in European cinema among international youth, structural limitations—such as limited genre diversity, uneven digital access, and a perceived elite lens—continue to hinder its broader appeal. We found that young viewers often use film as a space for identity negotiation, finding personal and communal meaning through curated watch parties, social media

discussions, and platform-based discovery. These findings underscore that European cinema's strength lies not only in its cultural richness but also in its potential to foster transnational belonging, if paired with more inclusive narratives and accessible distribution.

Policy and industry stakeholders should recalibrate strategies to engage this evolving audience segment. Recommendations include enhancing genre diversity, improving representation, and leveraging peer-driven marketing through curated playlists and campus events. These hybrid, participatory spaces can align European cinema's artistic identity with global youth expectations. Embracing the complexity of youth engagement can significantly help European cinema evolve into a truly inclusive and globally resonant cultural force.

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Youth in the Global Film Industry: Charting Patterns Across Hollywood, Bollywood, Nollywood and Europe

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INTRODUCTION

In the rapidly evolving ecosystem of global media, cinema remains a powerful sector for storytelling, cultural expression and identity formation. Among the most dynamic, yet least institutionally understood, segments of the cinema ecosystem are young people, digital natives who consume, produce and distribute content across transnational platforms with ease and fluidity that defies hitherto traditional media frameworks. As the film landscape continues to be increasingly technologically and market interconnected, understanding the ways in which youth engage with cinema, both European and global, is essential for helping reimagining the future of the European audiovisual sector.

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Youth is not only a demographic of strategic interest. The concept of youth itself has evolved historically from one of self-sufficiency to a stage marked by dependency and transition. While the United Nations has attempted to fix the 15–24 age range as representative of youths, it gives member nations the flexibility to define youth as they deem fit (Sethuramalingam & Krishnan, 2017). Therefore, a comprehensive understanding of the youth demographic requires an integrated approach that incorporates sociological, historical and policy-based perspectives (Galstyan, 2022). Young people are active cultural agents whose preferences and practices shape the flows of global cinema. Streaming platforms, such as Netflix, YouTube and Disney+ have redefined the geography of film circulation, enabling access to content from Hollywood, Bollywood, Nollywood, East Asia and Latin America. These platforms have transformed film consumption into a borderless experience, dissolving many of the cultural and linguistic barriers that historically limited the circulation of European cinema. In this context, a pertinent question arises: how do the distinct consumption habits of young audiences in Hollywood, Bollywood, Nollywood and the European Film Industry inform the understanding of the EFI's position within a competitive, globalised cinema ecosystem? Recognising and mapping these cross-industry habits constitutes an important first step towards understanding youth preferences and consequently, informing future directions for European cinema.

This following discussion draws on the concepts of *cultural proximity* (Straubhaar, 1991) and *Europeanisation* as a cultural policy framework (Shore, 2000). The notion of the EU as an “enabling” actor is particularly salient. European institutions, through *Creative Europe* and other policy instruments, promote competitiveness of European content, while simultaneously reinforcing notions of cultural identity and democratic values. However, the tension between market-based competitiveness and cultural diversity remains unresolved, especially as youth audiences increasingly look beyond national and continental borders for content that resonates with their lived experiences and aspirations. Straubhaar (1991, 2007) argued that audiences prefer media content, which is culturally familiar, linguistically, narratively and aesthetically. According to Axelrod and Cohen (2000), as cited in Straubhaar (2007), complexity theory views individuals, groups and institutions “as agents who navigate their environments by drawing on past experiences. These agents develop and adapt strategies through repeated exposure to various forms of work,

viewing, production and interaction, learning from others and continuously refining their choices over time” (Straubhaar, 2007, p. 9). As media use is embedded in broader social, technological and cultural practices (Livingstone, 2007), young people engage with film not just as entertainment but as identity work, cultural negotiation and social currency. Preferences are shaped by access, recommendation systems, peer influence and global visibility. The EU’s ambition to project cultural values globally is often framed in terms of soft power (Nye, 2004) and cultural diplomacy. However, this ambition remains undercut by structural limitations, market fragmentation and lack of visibility among younger demographics (Meier, 2023).

Young people are important for the film industry, not only because they represent the main age group of cinema-goers, comprising 47% of the total cinema audience in the US and Canada (Dupont, 2013; European Commission, 2014; Motion Picture Association of America, 2022; Statista, 2025b), but also because they watch films more frequently than older demographics. Out of the 6.9 hours youths spend on average daily watching television or movies via cable and streaming platforms, 2.1 hours (or 30.43%) are specifically dedicated to film viewing (Statista, 2024b; Fontaine, 2025; Widener et al., 2025). This strong engagement can also be seen in the European film market: of the 26 European films that surpassed 200,000 admissions recently, 9 were children’s films (movies made specifically for young people). Data from different countries across the world, such as North America (Dupont, 2013; Motion Picture Association of America, 2022; Statista, 2024b; Widener et al., 2025; Statista, 2025b), Nigeria (Akpabio, 2007; Badru et al., 2022) and European countries (European Commission, 2014; Fontaine, 2025) echo that young people are a *key demographic* of the film industry.

Previous research is concerned with multiple intersections of cinema and youth. Likely the longest and most extensive research focuses on the influence and effects of movies on children and youth. Anxieties around cinema corrupting young audiences, perceived as most susceptible to external influence have led media policy historically, but also brought about social research of cinema audiences in the first place (Stokes, 2019). A field of research that developed much later is the analysis of the ways in which young people are represented in film and audiovisual products. Serious inquiry into the textual representation did not begin before the 1980s (Shary, 2006, p. 3)—with works like *The Cinema of Adolescence*

(Considine, 1985) or *Teenagers and Teenpics: The Juvenilization of American Movies in the 1950s* (Doherty, 1988)—and that the first anthology book on “young adult roles in international cinema” was *Youth Culture in Global Cinema* (2006), edited by Seibel and Shary himself. Two under-researched areas are those inquiring on young people as creators of cinematic products and as film audiences.

This chapter explores knowledge about youth as audiences in a *global system of film industries*, which is predominantly understood as a global market. Among them we decided to explore Hollywood, which stands as the industry with the highest box office revenue globally, generating an estimated 34.5 billion US dollars in 2023, although this figure remains below its pre-pandemic peak of over 42 billion US dollars in 2019 (Statista, 2024a). Bollywood—India’s film industry, derived from the term “Hollywood”, owing its origins to film critics and columnists of the city of Bombay of the 1970s and 1980s (Kumar, 2014), on the other hand, is recognised for producing the greatest number of films annually, approximately 2500 titles, accounting for around 29% of the global total (WIPO, 2024). Nollywood—derived from the term “Hollywood” represents the Nigerian video film production (Haynes, 2007), the third most active movie industry in production worldwide (Eliwa, 2020; FMACCE, 2024); followed by the presentation of the European young film audience. In the conclusions, after addressing youth’s film preferences of different film industries, the study points out commonalities and characteristics of global young audiences.

THE BATTLE OF THE GLOBAL FILM INDUSTRIES

To define the ranking of global film industries, we refer to the data development analysis (DEA) model developed by Liu (2020), which evaluates each film industry based on primary indicators such as industry environment, supporting conditions, industry scale, efficiency and influence. The results, based on K-means clustering, present the top nine countries globally from 2010–2017. In 2017, the first place is America, followed by China, India, South Korea, Japan, Germany, Britain, France and Russia (see Tables 9.1 and 9.2, adapted from Liu, 2020).

Additionally, information was collected with focus on the annual number of produced films and the box office numbers. Starting with the data of film production for the year 2022, as released by the World Intellectual Property Organization (WIPO, 2024). Based on their data,

Table 9.1 Top film-producing countries globally (National bureau of statistics, 2021; Statista, 2023; WIPO, 2024)

<i>Country</i>	<i>Films produced in 2021</i>
India	2.497
Nigeria	1.051
North America	834
Japan	634
China	485
Spain	322

Table 9.2 Box office revenue in billion US dollars in 2023 (BusinessDay intelligence, 2024; Celluloid Junkie, 2024; Sharf, 2024; Statista, 2024a)

<i>Country</i>	<i>Revenue in billion US dollars - 2023</i>
North America	9.7
Europe	7.8
China	7.7
Latin America	2.7
Nigeria	1.8
India	1.3

the five top countries on annual film production are India (2.497 films), America (834 films), Japan (634 films), China (485 films) and Spain (322 films). The same report presented a table (Fig. 9.1) with the film production development from 2000–2020 from the leading countries: India, America, Japan and China:

Additional sources following the latest data stop show that Nigeria ranks among the top five countries in terms of annual film production. Between January and June 2021, Nollywood produced 1051 films (National Bureau of Statistics, 2021; Statista, 2023), placing Nigeria in the second place after India. Even though this data set does not include data for the whole 2021 year but only for six months, it already positions Nigeria among the top film-producing countries globally (National Bureau of Statistics, 2021) Table 9.1.

From the data of film production, the three top countries are India, Nigeria and America globally. However, aside from the number of film productions, a key factor is also the revenue of the countries globally, where the ranking is different. Exploring the box office from different countries of the last few years, interesting was that only for the 2023 ranking we managed to find and collect information regarding all top-rated countries. The data from other years were available for only a few

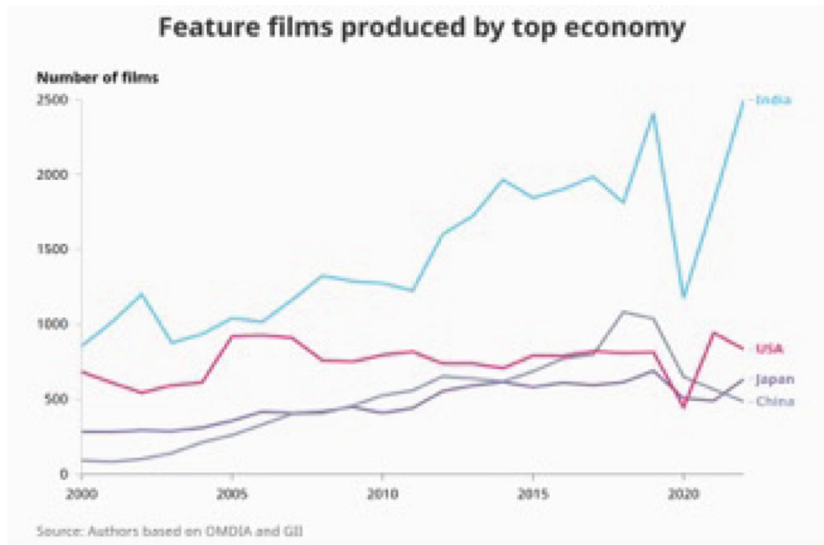


Fig. 9.1 Feature films produced by top economies (WIPO, 2024)

countries. In the following table (Table 9.2), we present the data we collected from the ranking of revenue in US dollars in 2023:

In 2023, The box office revenue in North America reached 9.7 billion US dollars compared to Latin America with 2.7 billion US dollars (Statista, 2024a). In Europe, the box office reached 7.8 billion US dollars. There was a significant increase of 24% from 2022–2023 (Celluloid Junkie, 2024). There is an information gap on the Asia-Pacific box office percentage (Statista, 2024a), with the exception of information on China that reached 7.71 billion US dollars in 2023 (Statista, 2024a). In the same year, Nollywood reached 1.8 billion US dollars box office revenue (BusinessDay Intelligence, 2024), while India had a box office revenue of 1.3 billion US dollars (Sharf, 2024).

Besides box office revenues and number of productions, in evaluating the “biggest” film industries, we take into account their global cultural influence. Research suggests that the US film industry has been the big global power in the field of film, even coining its own neologism, *Hollywoodization*. Hollywoodization describes the process of Asian film industries conforming to the US-American ways of making films, like the

introduction of sexual scenes in Bollywood films or maybe most emblematically the term “Bollywood” itself (Rampal, 2005). However, this is not at all a phenomenon limited to Asian countries, as the influence of Hollywood also spreads to the film industries of Africa and South America (Ibbi, 2013). Critical scholars have characterised Hollywood’s influence as a form of cultural imperialism (see Rampal, 2005; Maisuwong, 2012; Ibbi, 2013; Chen & Shen, 2021), “a domination of a more recognised culture over other cultures”, “a cultural loss process” that “is a process to eliminate” (Maisuwong, 2012, p.1). The following section discusses the Hollywood film industry, aiming to capture young peoples’ film preferences as audiences of the globally leading film industry, based on The box office revenue (Statista, 2024a).

YOUNG HOLLYWOOD/AMERICAN AUDIENCES

Youth was “to become Hollywood’s core audience: the 12–24 age group” (Dupont, 2013, p. 1) after families who, although Hollywood’s target audience for the longest time, gradually stopped spending time in movie theatres in the 1950s. With blockbusters, such as *Jaws* and *Star Wars* and new viewing habits, such as “repeat viewing”, this group cemented its status as regular audience (Dupont, 2013). Using demand data and audience demographics on recent movie releases that have made a significant impact on young audiences, Parrot Analytics’ Audience Solutions, identifies GEN Z, the age group ranging from 15–24 years old today, as a major component of TV and movies global audience with approximately 27% of viewership share (Parrot Analytics, 2024). Regarding the highest grossing films (Lang, 2025) or the films with the biggest budgets (IGN) of the last years though, most are either directly targeting children and youth—*Inside Out 2* in 2024, *Barbie* in 2023, *Finding Dory* in 2016—or part of popular Action-genre franchises—*Spiderman: No Way Home* in 2021, *Avengers: Endgame* in 2019, *Star Wars: The Last Jedi* in 2017 (Motion Picture Association of America, 2018).

Current academic research about US children and youth as film audiences is scarce. Young people are included in data on film audiences as a whole overwhelmingly conducted by the industry (MPAA, 2022; 2023). Motion Picture Association of America (MPAA) is made up of the six biggest American film production companies and National Association of Theater Owners (NATO) is the most important source for audience numbers. For years, the MPAA has published the THEME

report (Theatrical & Home/Mobile Entertainment Market Environment), analysing industry performance and audience demographics. Since 2022, the THEME report has been halted without announcement, virtually stopping regular reporting on US film audience demographics. In 2023, the MPAA introduced *The American Motion Picture and Television industry: Creating jobs, trading around the world*, a much shorter report that does not include data on audiences. The 2022 THEME report confirms the status of young people as a key demographic of the film industry: in 2021, young audiences' purchasing of movie tickets was disproportionate to their share of population with all groups below 40 being overrepresented in moviegoers and sold tickets and the group of 12–17-year-olds as the only demographic with a per capita attendance higher than 2, namely 2.5 (Motion Picture Association of America, 2022).

The data of the *Movie audience breakdown in North America H1 2024, by age and gender* statistics, indicate that in the US and Canada the audiences of the movies released in the first half of 2024 are mostly young people (Statista, 2024b). Among them, female audiences aged 18 to 34 are up to 30% of the total audiences of this period. There is a significant decrease in film audiences older than 35 years. With an average 6.9 hours per day, Generation Z is the generation with the highest daily media consumption in the US, divided into 1.4 hours daily using social media; 1.3 hours daily watching television shows or movies on streaming services; 1.1 hours per day playing video games; 1.0 hour per day listening to music and the same percentage for watching user-generated content; 0.8 hours daily for watching shows or movies on cable or linear television; and finally, 0.3 hours daily for listening to podcasts (Widener et al., 2025). Content wise, the Teens + Screens 2024 report indicates that adolescents between 10 and 24 prefer fantasy movies and shows as well as “hopeful, uplifting content with people beating the odds” (Burrus et al., 2024, p. 8). The report confirms the consistently high status that cinema has among young US audiences: asked about leisure activities disregarding time or financial considerations, respondents prioritised going to the cinema above all other activities (Burrus et al., 2024).

Another report regarding the film audiences in the US presents that Gen Z is going to the cinema more often than the other age groups (Statista, 2025b). Older people are less likely to go to watch a film. The industry is highly dependent on young audiences, who “are breathing new life” into the film industry (Statista, 2025b). The report highlighted

that films that appeal to young people have a higher chance of becoming a box office success. The most popular genres among young people in the US are horror and the video game adaptations (Statista, 2025b). After highlighting the young people's preferences in the US, primarily in regard to Hollywood, the chapter turns its attention to the preferences of young Indian audiences.

YOUNG BOLLYWOOD/INDIAN AUDIENCES

India has a sizable film industry: films are produced in different languages, such as Telugu, Hindi, Marathi and Bangla that bring variety and diversity into the narratives and styles (Gadgil & Srivastava, 2024). Young people aged 15–30 from all of India have 33% as television audience across all ages (BARC India, 2018, p.2).

The findings from data collected from 1004 Indian respondents in 2022 present that young adults, aged 18–29, watch films mostly on streaming platforms, while adults over 40 years usually watch films on TV or in cinema (Singh, 2022). Additionally, the data shows that a quarter of all respondents, among them mostly young adults, have gone to the cinema more often since the pandemic. The study also found that young adults' favourite genres are action, horror and thriller films. Finally, the study highlighted that Bollywood films were the most popular among all participants with up to 61%, followed by Hollywood with 45% and regional South Indian films with 45% (Singh, 2022).

In 2023, a survey explored audiences' preferences of 40 young people aged 15 to 35 in India, pointing out that young people prefer Bollywood films over Hollywood (Kaur, 2023, p. 204). Regarding their genre preferences, most young people watch romantic movies and comedies. Young people explain that the reason for becoming indifferent to Bollywood films is due to lack of authentic content and storyline. Additionally, participants expressed the feeling that through Hollywood they are introduced to the western culture and some said that they “try to adapt western culture” (Kaur, 2023, p. 206), underlining the important role of the streaming platforms for “switching from Bollywood to Hollywood movies” (Kaur, 2023, p. 206). Finally, young people had a positive response, regarding whether they acknowledge that movies have any effect, more or less, in their lives. Only a minority, consisting of 27%,

expressed that they do not, or rarely, realise or experience any movies' impact on their lives.

Adding to the literature, a study exploring how Bollywood cinema influences young audiences in India conducted a survey with 508 young people aged 18–29 in India (Gadgil & Srivastava, 2024). The study's findings present that the majority of young people watch a movie a few times per month and they prefer mostly Bollywood films. The majority of young people (43.9%) expressed that they feel inspired by movies to take action in their personal lives and they agree that Indian films have the “potential to bring social change” (Gadgil & Srivastava, 2024, p. 57).

To explore young people's interpretation of Hindi films, Banaji (2012) interviewed over 100 young people. Young people do not express a homogeneous perspective about the behaviours they observe in films. On the one hand, they admire a wealthy and glamorous lifestyle but they are annoyed by elitism and morality. Modern films neglect the lived realities of the poor and instead promote wealth. Finally, young viewers usually criticise film content when their personal beliefs conflict with the film content and the topics of class and wealth “are not generally introduced by directors and experienced or used by audiences in isolation” (Banaji, 2012, p.64) but usually are tied to issues like gender, family and sexuality.

In an analysis of the factors influencing film consumption choices among young adults aged 18–25, the study's results pointed out that their preferences are primarily shaped by content-related parameters, such as technical proficiency and marketing strategies (Bhargava, 2024). Additional key factors include plot construction and thematic representation. Participants reported watching Indian cinema largely because they feel more related to it: “it is ‘relatable’”, giving it a competitive advantage to Hollywood, which is “more ‘believable.’” (Bhargava, 2024, p.6). Furthermore, educational background, parental and peer influence, the star power of actors, directors and production houses, as well as the role of music and dance, all emerged as significant determinants in young Indian audiences' film consumption choices (Bhargava, 2024). After highlighting young audiences' preferences, with regard to Bollywood and India, the following section explores the film industry of Nollywood and youth audiences.

YOUNG NOLLYWOOD/NIGERIAN AUDIENCES

The Nigerian contemporary cinema phenomenon, or Nollywood, is an African film industry that started in Nigeria in the late 1980s (Akande, 2020). With acclaims initially restricted to Nigerian and African audiences (Esan, 2008), it progressively made roads on the global scene with an annual production of over 2.500 movies (FMACCE, 2024), generating approximately US\$65.65 m in 2025 (Statista, 2025a). Nollywood is reputed to be the third most active movie industry in production worldwide, given that the reach of its audience has grown beyond Nigeria and Africa (Elinwa, 2020). The industry is widely referred to as Nollywood. However, the term is used with the understanding that it is restricted to the film production sector, as it properly refers to that aspect of Nigerian film production that has its main centre in Lagos (Obiaya, 2016).

A study on youth audience perception of Nollywood movies provide evidence that the age range of the Nollywood audience falls within the range of 18 to 34 years (Badru et al., 2022), confirming Akpabio's (2007) assertion that the 16–35 years are the core of Nollywood's audience. The study shows that Nollywood movies are majorly consumed by the less privileged audiences who receive no pay or are in low-pay employment. Moreover, this economic reality influences their film preferences (Badru et al., 2022). Badru et al. (2022) highlight that language of movies is a predominant factor influencing youth perception and consumption. Their findings indicate that the audience prefers English-language movies, which further influences the ways in which they see Nollywood movies. Other predominant local languages, widely spoken by different ethnic groups in Nigeria and used in Nollywood, include Yoruba movies (29.7%), Igbo movies (16.9%) and Hausa movies (12.5%). Moreover, 47.7% of the audience find English movies more interesting than Yoruba movies (28.9%), 12.8% find Hausa movies interesting and 10.6% find Igbo movies interesting (Badru et al., 2022). These findings corroborate the works by Akpabio (2007) and Akinsola (2020), who reveal that the selected youths, die-hard fans of Nollywood films, consistently show a preference for English Nollywood films above the regional ones produced in indigenous languages. Interestingly, Akpabio (2007) notes that despite some elements of negative movie themes in the industry, there is a rise of interest in themes such as love, romance and light-hearted themes that border on the absurd or comical.

Further insight into youth media consumption is provided by the BusinessDay Research & Intelligence Unit (BRIU, 2018), which published the Nigeria Media Consumer Survey Report presenting the media consumption of Nigerians, with 925 participants, of which more than 860 participants were aged 16–35. Regarding their video-based entertainment choices, the participants indicated documentary films (33%), movies downloaded online (51%), videos watched via streaming (27%) and the most popular are TV channels (58%). The percentage of people going to watch movies in theatres was low at 28% (BRIU, 2018), underscoring the importance of affordability and accessibility, with youth audiences gravitating towards content that can be accessed at little or no cost.

In a cross-cultural study on the Influence of Nollywood Film in Cultural transmission to diaspora audiences with 370 participants was found that over a quarter of respondents (28%) stated that the transmission of values and culture was the most important reason for watching Nollywood films; further highlighting the significant role Nollywood plays in reinforcing cultural identity, especially among youth, and supporting the ongoing negotiation of identity in a globalised world (Onyenankeya et al., 2017). With a population of over 216 million people (National Bureau of Statistics, 2023), more than 250 ethnic groups and great religious and cultural diversity, the country presents via its film scene an overview of social issues, values, arts, literature and dressing. Nollywood, as the country's film industry, mirrors this diversity in its output, serving as a cultural transmitter and a reflection of the nation's complex social fabric (Onyenankeya et al., 2017). In addition to cultural transmission, entertainment remains a primary motivator for Nollywood consumption among youth. The same study shows that a significant share of viewers (40% or 147) identified themselves as “Africans” or “Nigerians” as part of their viewing preferences, indicating that cultural resonance and relatability are central to their engagement with Nollywood content (Onuzulike, 2016). Youth audiences also express a strong appreciation for the way Nollywood movies represent everyday life and culture, with 27% specifically valuing this aspect.

Nollywood's youth audience is defined by its size, diversity and digital savviness. Young viewers favour accessible, relatable and culturally resonant content, with a clear preference for English-language films but demonstrate a continued appetite for indigenous language productions. Their media consumption is shaped by affordability and convenience, driving demand for downloadable and streaming options over traditional

cinema. Interestingly, Nollywood's ability to reflect Africa's complex social fabric and transmit cultural values remains a cornerstone of its appeal, ensuring its continued relevance among youth both at home and in the diaspora (Onuzulike 2016; Tsaaior, 2018). After exploring young audiences in Nollywood and Nigeria, following we focus on young European audiences.

YOUNG EUROPEAN AUDIENCES

Exploring European adolescents¹ (13–19 years) attitudes to cinema through a cross-cultural study with 937 secondary school students from eight European countries,² Soto-Sanfiel et al. (2018) examined students' perceptions about cinema and Europeanness along with their knowledge of the production process. Their findings highlight that young people prefer American over European films, although they do like watching European films. Additionally, they are negative towards their home country's movies as they characterise them as low-quality productions. Students characterise European films as “more artistic, more predictable, more patriotic, with better scripts and with fewer prejudices”, but on the other hand also “less exaggerated, spectacular and commercial (...) of less quality and contain less fantasy” (Soto-Sanfiel et al., 2018, p. 19), without pointing out that the European film industry promotes more social and cultural diversity (Soto-Sanfiel et al., 2018). In another publication from the same research project, Soto-Sanfiel et al. (2021) focus on frequency and motivation to watch film and especially in cinema theatres, how they choose films and their favourite genres. The findings of the study indicate that young people (80.4%) prefer watching films from home and only a minority (16.2%) prefers going to the cinema. Most young people (75.1%) prefer going to the cinema with their friends. The study found that the most popular film genres of young people are “comedy,

¹ We acknowledge the importance of other global leading film industries, such as China, Japan, South Korea and South America; however, for the purpose and the length of a chapter, we had to select which film industries we will explore. We decided to analyse Hollywood as a leading film industry from the continent of America; the Nollywood from the continent of Africa and the Bollywood from the continent of Asia because of the extraordinary and significant high number of film production, which places it at the top of the global ranking.

² The eight European countries, where the study was conducted, are Croatia, England, France, Germany, Iceland, Italy, Romania and Spain (Soto-Sanfiel et al., 2018).

adventure and action” (Soto-Sanfiel et al., 2021, p. 129) and the most important criteria of a good film are defined as the “plot, actors and soundtrack” (Soto-Sanfiel et al., 2021, p. 129).

Exploring the film consumption and genre preferences of 1015 young people, aged 16 to 18 in Belgium, Veenstra et al.’s (2024) findings indicate that girls’ favourite film genres are drama; youth and family; musical; and music and romance, while boys prefer action and adventure; war and disaster; and western films (Veenstra et al., 2024, p. 6). The study argues that on the one hand, gender is a key factor that influences youth’s film preferences and on the other hand, the study found that the educational level has some impact on the film selection: more educated people do not prefer the horror genre, explaining that it reflects “lowbrow culture” (Veenstra et al., 2024, p. 7) and lower educated people prefer only specific genres. The study also underlines that no correlation has been found between film preferences and ethnicity, referring to Belgian and foreign groups living in Flanders (Veenstra et al., 2024).

Exploring the case study of the European Film Academy and how young audiences are engaged to understand their film preferences of people aged 12–24 through the Young Audience Award (YAA), of eleven awarded films, findings indicate that young people in Europe prefer films with three characteristics (Hiltunen & Lähdesmäki, 2024, p. 53): “coming of age” that refers to the process of growing up and the transmission from childhood to adolescence and early adulthood; “belonging” refers to connection among people, ideas, places that is also relevant with feeling included or not; and finally the “social challenges” referring to conflicts and challenges such as bullying, family problems, the school environment. The films are adventurous, with humour, entertaining or comedies and others address sensitive topics, even mental health issues, bullying and death (Hiltunen & Lähdesmäki, 2024, p. 54).

In 2014, the European Commission released its *A profile of current and future audiovisual audience report*, with audience data from 10 EU countries—including data on child, teen and young adult audiences. The data suggests that in Europe young audiences represent the most active group of cinema audiences as well: 7% of children (4–9 years) and 9% of young adults (16–24 years) stated they visit movie theatres weekly, compared with 4% in the group of 35–50-year-olds. Young audiences are also the group that considers itself fans of cinema the most (34% in 26–34-year-olds and 34% in 16–25-year-olds) and that additionally consumes most of films and television (European Commission, 2014).

Moreover, heritage films have increasingly become a popular choice among young audiences in Europe. According to the “*Heritage Films in Cinemas A 2014–2023 analysis*” by the European Audiovisual Observatory, both admissions to heritage films and the number of such films released have risen since 2014 (Fontaine, 2025). Notably, 9 out of the 26 European heritage films that surpassed 200,000 admissions during this period were children’s films specifically created for younger audiences. Overall, children and young adults (ages 10–29) accounted for the majority of heritage film admissions, representing 55% of total viewership between 2014 and 2023 (Fontaine, 2025).

An audience study on new production methods for Scandinavian screen cultures highlights the growing importance, particularly in contemporary youth films and series, of moving beyond simply accurate portrayals of young people (Freudendal, 2023). Instead, these productions should speak “*to and from* their everyday experiences” (Freudendal, 2023, p. 251). Depicting the lives of young people authentically and on an equal footing without “sugar-coating” is presented as a crucial element of a film’s success. This supports the assertion that young audiences are, in fact, accustomed to far more challenging material than is typically portrayed (Freudendal, 2023). The study further observes that involving young people in the development of specific scenes and ideas during production is a valuable means of enhancing authenticity, relatability and relevance.

Finally, exploring the ways in which young audiences engage with nostalgic media texts among a pool of secondary school students, a study found that youth engage with a diverse range of media, involving practices that cross and combine genres, formats and both traditional and online platforms (Muñoz-González, 2021). Among this selection, the most frequently cited TV series genres oscillated between drama, fantasy/supernatural and mystery/thriller.

THE EU AS A GLOBAL ACTOR IN SUPPORTING AUDIOVISUAL SECTOR

The European Union has positioned itself as a global enabler of the audiovisual sector, supporting both creative professionals and audiences through internal measures such as training, mobility and production or distribution assistance, alongside external cultural diplomacy and development cooperation. The commission’s communication on a “European

Agenda for Culture in a Globalizing World” marked an important step in defining culture as a strategic element of the EU’s external action, promoting the integration of cultural considerations across all external policies (European Commission, 2014).

Building on this foundation, Creative Europe (MEDIA) now represents the core of the EU’s audiovisual policy toolbox, directly targeting the sector through development, distribution and audience-building schemes that prioritise youth engagement, cross-border cooperation and talent mobility. MEDIA’s project platform and content clusters demonstrate sustained investment in training, festivals and distribution measures that help young Europeans access transnational networks and markets (European Commission, 2023). The MEDIA Plus (Training) strand was designed to enhance the professional capacities of those working in the European audiovisual industry by providing continuous vocational education. Its objective was to equip professionals with the skills required to engage effectively with both European and international markets and to adapt to emerging technological developments (Media Plus (Training), Art. 1).

Building on its role as a global enabler in the audiovisual field, the EU’s commitment to strengthening creative industries has evolved through a series of funding programmes. The MEDIA programme, launched in 1990, was the first structured initiative to support the European audiovisual industry within the single market, fostering intra-European exchanges and promoting European works internationally.³ Its successor, MEDIA II (1996–2000), broadened this approach through development, distribution and training strands designed to enhance cooperation among producers and improve access to global markets.⁴ The MEDIA Plus Programme (2001–2006) consolidated these objectives,

³ 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 1991–1995), Official Journal of the European Communities, L 380, 31 December, pp. 37–40.

⁴ 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) (1996–2000), Official Journal of the European Communities, L 321, 30 December, pp. 25–31; Council Decision of 22 December 1995 on the implementation of a training programme for professionals in the European audiovisual programme industry (MEDIA II-Training), Official Journal of the European Communities, L 321, 30 December, pp. 33–38.

integrating new technologies and promoting the competitiveness of European content worldwide.⁵ Together, these programmes laid the groundwork for Creative Europe, which continues to combine internal market development with external cultural diplomacy and global engagement.⁶

The MEDIA 2007 programme, operational until 2013, further reinforced the EU's international outlook in the audiovisual field. It sought to strengthen the competitiveness of the European audiovisual sector while expanding the circulation and visibility of European works within and beyond the EU through increased cooperation among industry stakeholders.⁷ Its measures supported the development of projects targeting both European and global markets, enhanced the distribution of European films across international platforms and promoted wider access to Europe's audiovisual heritage through participation in professional markets and festivals.⁸

Building on the legacy of the successive MEDIA programmes, Creative Europe (2014–2020) unified the EU's support for the cultural and audiovisual sectors under a single framework, aiming to enhance cross-border circulation, competitiveness and audience engagement across Europe and beyond.⁹ Its successor, Creative Europe MEDIA (2021–2027), continues

⁵ 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), Official Journal of the European Communities, L 336, 30 December, pp. 82–90; 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), Official Journal of the European Communities, L 26, 27 January, pp. 1–5.

⁶ Regulation (EC) No 1905/2006 of the European Parliament and of the Council of 18 December 2006 establishing a financing instrument for development cooperation, Official Journal of the European Union, L 378, 27 December, pp. 41–71; 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), Official Journal of the European Union, L 330, 20 September, pp. 1–50.

⁷ Decision No 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), Official Journal of the European Union, L 327, 24 November, pp. 12–29.

⁸ Ibid., Arts. 4(1) (a) and 5(b).

⁹ Regulation (EU) No 1295/2013 of the European Parliament and of the Council of 11 December 2013 establishing the Creative Europe Programme (2014–2020) and

this trajectory by strengthening the resilience and innovation of the audiovisual industry, promoting talent mobility and expanding access to European works in a rapidly evolving digital landscape.¹⁰

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). NDICI focuses on broader development and international cooperation, as part of Multiannual Financial Framework (MFF) for 2021–2027.¹¹ 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 emphasise the promotion of democracy, the rule of law, human rights and sustainable development worldwide (European Parliament, 2021).

repealing Decisions No 1718/2006/EC, No 1855/2006/EC and No 1041/2009/EC, Official Journal of the European Union, L 347, 20 December, pp. 221–237.

¹⁰ Regulation (EU) 2021/818 of the European Parliament and of the Council of 20 May 2021 establishing the Creative Europe Programme (2021–2027) and repealing Regulation (EU) No 1295/2013, Official Journal of the European Union, L 189, 28 May, pp. 34–60.

¹¹ 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.

CONCLUSIONS

Understanding young people's engagement with the film industry is not just about viewership; it is about shaping the future of cultural industries. Youth audiences worldwide are central to the sustainability of their respective film industries. From Gen Z in the US revitalising box office sales, to Indian youth driving both Bollywood and Hollywood streaming viewership, to Nigerian youth consuming Nollywood as cultural affirmation, young people are not merely consumers but active cultural participants. Comedies and action remain among the most important genres for youth, alongside fantasy, escapism, relatability and inspirational narratives. Across regions, young audiences gravitate towards content that reflects their realities or aspirations whether through realism in Nollywood, action and hope in Hollywood or emotional storytelling in Bollywood. These findings demonstrate youth adherence to cultural proximity, actively seeking content that is culturally closer to their own language, traditions and values rather than passively consuming any film content. This challenges the notion of a homogeneous, passive global audience and offers explanation as to why local and regional productions often retain strong appeal, limiting cultural erosion.

Despite their significance, drawing firm conclusions about youth preferences across regions remains challenging, as current research data is often fragmented, outdated or market-driven. There is a notable lack of longitudinal, systematic, youth-focused audience research that spans regions and captures the emotional, social and digital dynamics of young people's film consumption.

What differs is the means through which and why youth engage. The diversity across these industries in terms of language, access modes and cultural reflection is notably high, especially as youth increasingly value culturally resonant and diverse narratives. Hollywood audiences, for instance, retain a strong connection to cinema as a social experience, especially in theatres, while Indian and Nigerian youth lean heavily towards streaming and mobile access. Indian audiences show an internal tension between cultural relatability and the allure of Western content, often influenced by digital platforms. Nigerian youth emphasise cultural reflection, with language playing a pivotal role in their consumption choices. European youth, meanwhile, display a preference for Hollywood blockbusters

over national or European films, despite acknowledging the artistic quality of the latter. Overall, across industries, affordability stands as a constant challenge to youth film consumption. This suggests a perception gap, not necessarily a content gap. Furthermore, while Hollywood enjoys global visibility, it is not always the top preference: the diversity of Bollywood and Nollywood in terms of language, modes of access and cultural narratives offers strong appeal to regional youth and sometimes surpasses Hollywood in relevance.

As per different and specific highlights, Hollywood excels in marketing spectacle and global franchises that dominate youth attention. Bollywood blends musical drama and cultural proximity with a growing self-critique about authenticity. Nollywood uniquely serves as a cultural transmitter, emphasising local narratives and identity reinforcement. European cinema, though artistically appreciated, struggles with youth engagement due to perceptions of predictability or lack of spectacle, despite its rich diversity. Within these contexts, we argue that the enabling function of the EU as part of the Europeanisation framework must be reconceptualised, not just as a matter of funding or AV industry and market-focused regulation, but as a strategic, youth-oriented cultural positioning. Our discussion contributes to the film industry ecosystem by revisiting and contextualising young people's cinematic tastes.

Understanding the nuanced preferences and behaviours of young audiences across global film industries offers valuable insights for reimagining the future of the European Film Industry. As this work has shown, young people are not merely passive viewers but active cultural agents whose engagement is shaped by emotional resonance, social relevance and digital accessibility. Their consumption patterns are deeply tied to questions of cultural identity seeking affirmation, relatability and inspiration through narratives that reflect their lived realities or aspirational selves.

As a result, Europeanisation must be understood not solely as a regulatory or market-oriented framework but as a broader cultural and identity-building project. As conceptualised by Shore (2000), Europeanisation involves the symbolic construction of Europe and a shared cultural space. Yet, studies reveal a disconnect between EU-level cultural objectives and youth audience preferences, where Europe's cinematic offerings are often perceived as distant, unengaging or lacking in immediacy and spectacle compared to global counterparts.

For the EFI to enhance its competitiveness and assert a distinct identity, it must move beyond traditional narratives and formats, engaging directly with youth through cinema that reflects diverse European identities, participatory storytelling and innovative digital distribution strategies. By tapping into the global youth audience's desire for authenticity, inspiration and cultural relevance, while addressing the perception gap that distances European cinema from young viewers, the EFI has the opportunity to redefine its competitiveness. This requires not only policy support and creative innovation but also a renewed cultural vision that places young people at the heart of Europe's cinematic identity and global strategy.

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Squaring the Circle? Small Markets Between Domestic and International Audiences

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INTRODUCTION

Being small can be tough. The European cinema that exports well usually involves France, the UK and the US; is in the English language; and within a limited scope of expensive genres, like action and adventure (Jones, 2024). Small European markets hardly feature in these stories of European export successes. Focusing only on export success, however, obscures domestic audiences' importance for European film industries since over two-thirds of admissions to European film come from the domestic markets (Fioroni, 2024, p. 10). Despite their more limited output, some small markets in fact manage to exceed the 15.5% EU

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average share of admissions to domestic film in the national box office. Not addressing the specific struggles of small markets, but also not looking at how they manage to maintain their connection to audiences at home and abroad, means not using the small markets' potential for finding different pathways to competitiveness for Europe's audiovisual industries. This chapter therefore puts focus on the specificities of small European markets' cinema and considers the question of exportability in relation to what is popular with domestic audiences. This requires answers to three sub-questions: a) Which kinds of films from small markets perform well with international audiences? b) Which kinds of small market films perform well with domestic audiences? c) What does the overlap tell us about the possibilities of small markets in meeting both demands?

Our approach combines admissions data from films produced across seven small European markets (Croatia, Denmark, Estonia, Flanders, Ireland, Lithuania, Portugal) and interviews with domestic audiences.¹ The findings suggest that changes in funding and support policies could help small European markets match the different audience profiles more efficiently through focus on genre, strategic festival orientation and balancing of cultural placing between domestic recognition and international recognisability. At the same time, the chapter aims to showcase that funders and distributors should reassess assumptions about which kinds of films are mainly for domestic or international audiences. For the EU as a film policy enabler, we advocate supporting small markets in targeting international audiences more strategically but with an eye to ways in which such increased international circulation and recognition can build capacity, cultural value and popularity at home.

¹ All data used in this chapter were collected and analysed in the context of the EU Horizon project CRESCINE - Increasing the international competitiveness of the film industry in small European markets (HORIZON-CL2-2022-HERITAGE-01, project ID: 101094988). The quantitative evidence is based on cinematic admissions data (Lumiere Pro) for a sample of 1426 feature films produced in the seven CresCine countries (Croatia, Denmark, Estonia, Flanders, Ireland, Lithuania and Portugal) between 2014 and 2022.

EUROPEAN FILM'S KNOWN PATHWAYS TO FINDING INTERNATIONAL AUDIENCES

The literature on the performance of European film points to a bifurcation of films for domestic and films for international audiences. European films create popular domestic successes, even in small countries (Higson, 2021a, pp. 203–204). Comedy centred around local cultural specificities and to some extent historical drama dominates what is popular among home audiences rather than festival-oriented, arthouse drama (Higson, 2021b).² Popular domestic film from Europe, however, is rarely exported—particularly popular domestic comedies (Higson, 2021a, p. 206). Considering the 215 European films that achieved more than 1 million European admissions outside their home market between 2005 and 2015 and speaking to audiences of non-domestic European film, Huw Jones (2024) sketches three pathways to international success: (1) Mainstream movies dominated by US-backed high-budget productions from the UK, like the *Harry Potter* franchise, or English-language action films such as the *Taken* series from France, which appeal to younger audiences looking for relaxation and recognisable stars. (2) Arthouse films, such as Poland's *Ida*, directed at urban niche audiences who are attracted by authorial branding, festival recognition and specific subject matter. (3) Middle-brow productions (historical dramas, biopics, thrillers and some comedies) such as *The Iron Lady* or *In Bruges*, which can attract various demographics based on genre, subject matter and complex emotions.

This comprehensive view on Europe obscures the specificities of small markets. Not only do films from small markets hardly feature among internationally popular European films, but particularly the first high-budget pathway to popularity is out of reach for them. Moreover, the view of domestic audiences on internationally successful European films is missing. Our small market sample comprises Croatia, Denmark, Estonia, Flanders (in Belgium), Ireland, Lithuania and Portugal. These seven markets differ in population size and geographical location within Europe, in their production capacities, film policies, levels of domestic market

² The research by Higson (2021a, 2021b) and Jones (2024) stems from the MECETES project's comprehensive study of cinema admissions in the EU28+EFTA of 21,000 films produced between 2005 and 2015. The project "Mediating Cultural Encounters through European Screens" (HERA 2013–2016) led by Andrew Higson investigated the production and distribution of European film and television drama in Europe, focusing specifically on how it is enabled or thwarted by EU and national cultural and media policies.

Table 10.1 Comparison of the seven Crescine markets: Population (data from Eurostat), domestic share in theatrical admissions (data from EAO Yearbooks, Statbel (2014–21) and Cinedata/FCB (2022), annual film production (EAO Yearbooks) and share of films with international cinematic release based on authors’ calculations of films with 500+ admissions outside their majority producing territory (data from LumierePro)

	<i>Population (avg. 2014–22)</i>	<i>Average domestic share (2014–22) (%)</i>	<i>Avg. number of domestic feature titles produced per year (2014–22)</i>	<i>Share of films with international cinematic release (%)</i>
Croatia	4,099,937	3.7	15.3	18.4
Denmark	5,771,832	30.8	43.3	48.2
Estonia	1,321,910	15.2	18.7	9.8
Ireland	4,853,331	2.9	18.4	54.8
Lithuania	2,838,348	19.1	14.0	27.9
Portugal	10,320,100	3.9	28.4	16.5
Flanders	6,574,657	17.1	20.8	38.0

shares, export successes and international festival recognition (Nielsen et al., 2024). Bringing them together allows for a nuanced picture of the challenges faced by the many small film markets in Europe, which is necessary for discussing effective policy solutions. The goal of this chapter is therefore not to compare the seven small markets, but to look at them as a representation of broader small market challenges, particularly in Europe. Table 10.1 summarises these differences based on data aggregated between 2014 and 2022.

METHODOLOGY

Admissions Analysis

To compare performance between domestic and international audiences, we rely on an analysis of admissions numbers based on the European Audiovisual Observatory’s Lumiere Pro database. Lumiere Pro aggregates theatrical admissions data for films produced in at least one of the 46 member states of the European Audiovisual Observatory, based on a variety of sources including industry bodies, national film agencies and third-party data suppliers. The data covers admissions in 49 markets. We

collected admissions data for a corpus of 1426 films that were majority produced in one of the seven small markets between 2014 and 2022. Since we needed to separate Flemish from Wallonian titles and because the assignment to majority producing countries in Lumiere Pro can contain mistakes, the list of films was double-checked with external sources such as reports from national film boards and reviewed by a panel of local experts. Following this approach, 40 titles were manually reassigned to a different first-producing country than the one indicated in Lumiere Pro.

To find the internationally top-performing films from our sample markets, we took the top 70 films for total non-national admissions. In contrast to Fioroni (2024), we set a threshold of 500 admissions outside the majority producing territory as the definition for theatrical export to exclude films with only limited international release, such as those only showing at a festival. To assess the domestic top-performers, we identified the top 10 for admissions within each of the seven majority producing markets in our sample. This filtering resulted in a data set of 126 films that form the basis of this chapter's analysis. The data derived from Lumiere Pro also includes IMDb genre indications for most films, which we manually supplemented for those films missing genre tags. To gain information about film festival participation, nominations and awards related to the films, we used an enriched version of the corpus data set that included nominations and awards information for 14 festivals plus the European Film Awards and the Academy Awards (Øfsti, 2024).

We focus on theatrical data for several reasons. General data on the presence and performance of European film on television (Fontaine, 2025) and VOD (Tran, 2024) points to the cinema being the window in which the highest domestic share is achieved for theatrically released films. In other words, theatrically released films achieve their highest share of domestic consumption in their theatrical window while the competition for viewing time with films from other countries is higher on television and on SVOD (Fontaine, 2025, p. 19). European films therefore rely much more on domestic admissions in the cinema than on domestic viewers on SVOD (Tran, 2024, p. 7). Many of the films in our sample achieved VOD distribution, but the potential of SVOD for audience success should not be overestimated, because of the very limited circulation of films from our seven markets on the big streaming services—Netflix, Disney+ and Amazon Prime (Bengesser, 2024; Damásio et al., 2025). Since this chapter is focused on the similarities and differences of individual titles, both data on title level and by market were

necessary, which is not afforded by recent reports on SVOD viewing (Grece & Tran, 2025) or data released by streamers.

Qualitative Diary Study and Interviews

To investigate domestic audiences' motivations for (not) watching films, their familiarity with cinema from their territory, and their pathways to content, we designed a multi-step methodology following the same approach across all seven markets. The approach consisted of a combination of digital media diaries over a five-day period and one-to-one interviews with a total of 86 participants across the seven markets. Participants were recruited using online screener surveys in local languages and selected based on different levels of engagement with domestic content, their general attitude towards its quality, as well as demographic characteristics (age, gender) and geographical ones (rural versus urban).

Combining media diaries and interviews accounts for the individualisation of media use patterns in an increasingly fragmented digital market (Bengesser et al., 2022). The goal of the media diaries was twofold: first, we got to know the participants' media use by asking them to record all audiovisual content they had engaged with during the day and which services they used. Second, we explored their broader tastes, familiarity with and attitudes towards domestic film. Participants were for example asked to indicate on a list of recent fiction films from their country whether they had heard of them or watched them. Each day, participants also watched a trailer for an upcoming domestic film and were asked whether they would be interested in watching it. The activities were based on our market knowledge gained during the analysis of admissions data from Lumiere Pro. Based on the knowledge gathered in the diary phase, interview guides were tailored to the participants' individual media use, knowledge and tastes regarding domestic film.

Interviews lasted one hour were conducted in local language using video-conferencing software (Zoom, Teams). Some participants opted for face-to-face, phone interviews or English language due to personal preferences. All interviews were transcribed in the local language. The research team developed a shared topical codebook using an abductive approach combining the overall topics covered by the interview guides, knowledge from similar audience studies (Bengesser, et al., 2023; Jensen 2023; Kauber, 2022; Steemers et al., 2025), and the themes that emerged from one interview from each market, which was coded by one member

of the local team. The codes for those seven pilot interviews were then compared, merged and elaborated to form a common codebook with rules to be applied to all interviews. The coded data set was shared across the team in an English-language version generated by translation software and double-checked by researchers familiar with the original material. In the analysis of the interviews, we focused on shared meta-themes (Wutich et al., 2021) within the topics across the seven markets. Though always rooted within the specific national contexts, the quotes and examples given below are exemplary of broader trends across the seven markets unless we explicitly state that a specific theme is unique to one market.

COMPARING DOMESTIC AND INTERNATIONALLY SUCCESSFUL SMALL MARKET FILMS

Properties of Highly Exported Small Market Films

The lists of small market films that achieve high admissions internationally and those that do well in their domestic markets barely overlap. In our sample of 126 top-performing films from the seven markets, only 14 can be found among both the domestic and the internationally top-performing films. In the following, we take a closer look at the properties of the separate lists before zooming in on the 14 films that apparently square the circle of domestic and international appeal. First, international success in terms of admissions is not equally distributed among the seven markets. Denmark makes up 45.7% of the top-exporting films, followed by Ireland (32.9%) and Flanders (17.1%). Portugal, Lithuania and Croatia only have one film each in this list, while Estonian film does not feature at all. This distribution also broadly reflects the fact that Ireland, Denmark and Flanders have a higher share of films that achieve international release than the Baltic countries, Croatia and Portugal (Table 10.2).

To put the success of these films into perspective, it must also be stressed that the number of international admissions for this small-market top-sample averages 724,000 non-domestic admissions and spans from 80,700 to 6.6 million non-domestic admissions. Only six films, i.e. 0.4% of the entire filmic output, from the seven markets in nine years can be classified as a ‘Euromillion’ production in Jones’ sense, i.e. achieving more than 1 million admissions in Europe outside its domestic market (Table 10.3). 50% of the internationally top-performing films achieved fewer than 210,000 international admissions.

Table 10.2 Number and share of films in terms of total production volume (2014–22) that achieved more than 500 non-national admissions. Data based on authors' calculations from Lumiere Pro

<i>Major producing market</i>	<i>Number of films exported</i>	<i>Share of films exported (%)</i>	<i>Number of films in international top 70</i>	<i>Share of films in international top 70 (%)</i>
Ireland	97	54.8	23	32.9
Denmark	157	48.2	32	45.7
Flanders	68	38.0	12	17.1
Lithuania	36	27.9	1	1.4
Croatia	18	18.4	1	1.4
Portugal	55	16.5	1	1.4
Estonia	18	9.8	0	0.0

Small markets are dealing with a triple hurdle when it comes to international performance. First, small markets like Estonia are effectively cut off from meaningful theatrical circulation abroad. Second, there are markets with a moderate international circulation of domestic films (Croatia, Lithuania and Portugal), but they do not achieve high admission numbers when exported. Third, the small markets that succeed in exporting more than a third of their productions (Ireland, Denmark and Flanders) hardly make it to the top of European film.

Four of the six small market 'Euromillions' (Table 10.3) are family-oriented animation films. In fact, 17 (24.3%) of the top 70 exporting films from our small markets are animation productions. Yet, animations only constitute 38 (2.7%) of the corpus of films produced in the seven markets between 2014 and 2022. The prevalence of co-production in European animation and the relatively easy adaptability of animation productions to importing markets through dubbing—particularly for family films—makes animation a likely exporter. As highlighted by Jones (2024), fantastical characters and settings that are either placed in stereotyped or unspecified places (p. 95) and/or tap into existing cultural figures from other media (p. 100) characterise successful European exports. These features can indeed be found among the top-performing small market animations, such as the adaptation of Daniel Defoe's *Robinson Crusoe*.

In contrast, only three animation films can be found in the cumulative domestic top ten of the Crescine markets: the Irish *Song of the*

Table 10.3 Small market ‘Euromillions’ (>1,000,000 admissions outside national market in CoE countries, based on authors’ calculations using LumierePro)

<i>Ecosystem</i>	<i>Original title</i>	<i>Prod. year</i>	<i>Prod. country</i>	<i>Film make</i>	<i>IMDb genre</i>	<i>Number of markets</i>	<i>Total non-national admissions</i>	<i>Europe (CoE)</i>	<i>Share of national admissions in European admissions (%)</i>
Flanders	The Queen’s Corgi Drunk	2019	BE, US	Animation	Comedy, Family	49	6,510,295	4,241,777	5.8
Denmark		2020	DK, SE, NL	Live-Action	Comedy, Drama	41	2,768,957	3,018,958	27.9
Flanders	Robinson Crusoe	2016	BE, FR, US	Animation	Adventure, Comedy, Family	46	6,561,025	2,638,800	4.2
Ireland	Room	2015	IE, US, CA, GB	Live-Action	Drama	37	4,740,466	1,930,600	9.8
Flanders	Bigfoot Family	2020	BE, FR	Animation	Family	37	2,611,706	1,633,388	7.7
Ireland	Song of the Sea	2014	IE, LU, BE, FR, DK	Animation	Adventure, Drama	28	1,796,448	1,177,231	3.2

Sea, which explores Celtic mythology, and the Danish *Ternet Ninja* 1+2. Among the Danish audiences interviewed, motivations for watching *Ternet Ninja* revolved around watching it together with their children or following the creatives behind the film, who were seen as icons of Danish humour that also appeals to adults. The fact that the film manages to comment on Danish society was also positively remarked upon. Hence, the three domestically successful animations are united by local cultural/social resonance.

Both live-action films in the small market ‘Euromillions’ won Academy Awards. In the list of the 70 internationally top-performing films, 57.1% per cent were nominated for and/or won an award at a prestigious festival, the Academy Awards and/or the European Film Awards. This form of recognition endows films with artistic prestige (in that each festival has its own kudos) (Valck, 2007) and provides media coverage that can entice international audiences, but artistic achievement and merit are not necessarily predictors for film festival success (Graça, 2021; Wong, 2011)—and neither is festival success a guarantee for positive audience evaluation.

For the films from small markets studied in our sample, festival recognition has an even more basic function: fostering international theatrical distribution. Among the films in our sample that were selected for festivals,³ only 34.8% per cent did not achieve international distribution, while 76.8% of the films without such recognition were restricted to their home market. Festival/award participation, therefore, is an important catalyst for the international distribution of small market films and a ground for comparatively high admissions internationally since more than half of the small market top 70 films achieved this form of recognition. From the perspective of domestic admissions, however, only 11.4% of the domestic top-performing films received nominations at festivals/awards recognition.

³ Festival success was determined based on the Swedish Film Institute’s quality score that includes 17 festivals plus the Academy Awards and European Film Awards. For three festivals considered in the SFI score (CPH:Dox, London Film Festival, Cinekids), no data on participation could be found.

Genre Differences Between Domestically and Internationally Successful Small Market Films

Genre clearly differentiates domestically and internationally well-performing films. Figure 10.1 compares the presence of individual IMDb genre tags in the two top 70 lists.⁴ While most of the internationally top-performing films are dramas, the majority (55.7%) of domestically top-performing films are comedies. Domestic audiences in small countries appreciate comedies for their cultural resonance, which is often based on adaptations/serialisation of popular culture and believed to express some specific ‘national’ humour (Grácio et al., 2025). Moreover, audiences appreciate domestic comedies to promote social connections, for example through co-viewing and common cultural references. The popularity of comedy for the sake of its cultural resonance is indeed characteristic across European domestic productions (Jones, 2024, p. 40). Yet, comedy (together with drama) also dominates production in the small markets for structural reasons. The limited resources available make it difficult to provide a spread of genres, particularly in countries with a small annual output, while the large budgets often associated with action, adventure, fantasy and sci-fi are out of reach for small markets (Fig. 10.1).

In the interviews, domestic audiences pointed to this lack of diversity in the domestic genre mix as well as budget limitations. They acknowledged that US-American films have ‘more opportunities’ and appeal for the genres that are lacking domestically, but audiences also showed a high level of reflection about what the budget limitations meant for small market films. This is illustrated by a Danish viewer in his early 30s, who talked about an adaptation of a Danish fantasy novel, *Skammerens Datter*:

They made two films from the four books. And I think in terms of production and effects they have done a fine job for Danish standards. But I have friends who also grew up with the books and have a real nostalgic relationship with them, but they basically disregard the films, because they are Danish. [...] Well, it’s a book series with dragons and if you want a dragon

⁴ IMDb genre tags related to documentary and animation have been removed, because this differentiation is provided separately in the Lumiere Pro data. In the manually collected genre information, dramas and comedies were characterized further (e.g. psychological drama). To create consistency with the existing data set from Lumiere Pro, these additional genre markers have been removed.

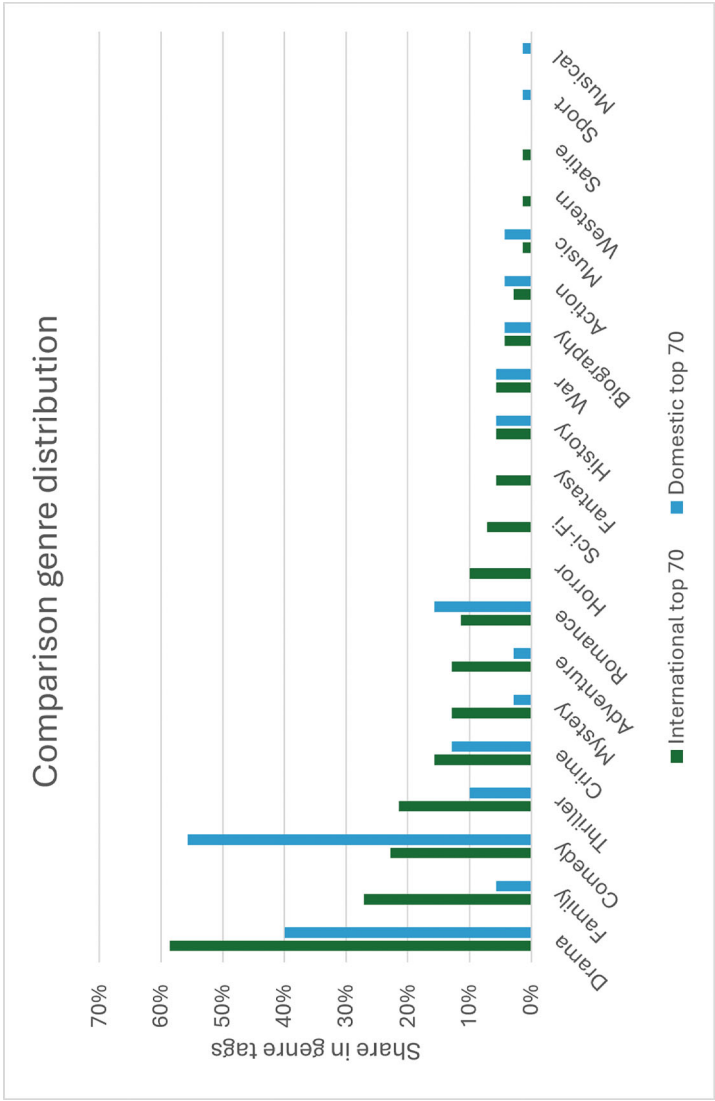


Fig. 10.1 Comparison of genre distribution in domestic and international top 70 titles. Percentage shows share of the individual genre tag in 70 films. Authors’ calculations based on Lumiere Pro and IMDb data

in your story, it must be a fancy and impressive dragon. And a studio in California will achieve that better than a studio in Ballerup.

On the rare occasions where small markets venture into different genres (Table 10.4), audiences were quickly concerned about the quality that is possible on a small budget. Yet, they were also willing to look beyond the budget constraints if the film offered some form of local cultural connection and/or a creative approach to dealing with budget constraints. The Croatian Zombie film *The Last Serb in Croatia*, for example, was praised by domestic audiences for discussing war and nationalism while creatively subverting budget limitations through comedy (Gracio et al., 2025, p. 290).

Small market films with more niche genre features do not have as high domestic admission numbers as comedies and many dramas. Hence, small markets not only need to cope with limited genre diversity and budget constraints, but also with balancing broad mainstream appeal that is often served by the domestically top-performing comedies and the interests of more niche genre film audiences.

Like animation, few films with sci-fi, horror, action and adventure traits are produced in the small markets, yet many of them appear in the internationally top-performing live-action films. A closer look at the titles (Table 10.4) shows that they are broadly united by English-language production (also those not from Ireland) and/or internationally recognisable talent, be it internationally active directors like Lars von Trier (*The House that Jack Built*), Yorgos Lanthimos (*The Lobster*), or Nicholas Winding Refn (*The Neon Demon*), or the presence of international stars, such as Jesse Eisenberg (in *Vivarium*), Rafiella Chapman (*Vesper*), or Mads Mikkelsen (*The Salvation, Mænd og Høns*). Except for *Mænd og Høns* [Men and Chicken], all these small market sci-fi/horror/action films are broadly oriented towards international audiences. Few of the films in Table 10.1 were mentioned by domestic audiences in our study. When they occurred, it was mainly in connection to people having heard about the films but missing them in the cinema (*Vesper*) or in connection to their famous talent, whom the domestic audiences appreciated for the same reasons as the international audiences in Jones's study (2024, p. 124). As highlighted by this Irish participant (age group 45–55) in relation to Yorgos Lantimos, who produces films in many different European countries, the recognisability of the 'auteur' is more important than local connections through Irish settings or actors:

Table 10.4 List of action, adventure, sci-fi and horror films in the sample of 2014–22 productions from the seven small markets in the top 70 exporting titles, including their share of domestic admissions in total admissions. Authors' calculations based on LumierePro data

<i>Ecosystem</i>	<i>Title</i>	<i>Year</i>	<i>Producing countries</i>	<i>Director</i>	<i>Language</i>	<i>IMDb genres</i>	<i>Share of domestic admissions in total admissions (%)</i>
Ireland	The Cellar	2022	IE, BE, US	Brendan Muldowney	English	Horror, Mystery	0.4
Ireland	Sea Fever	2019	IE, BE, SE, GB	Neasa Hardiman	English	Drama, Horror, Mystery, Sci-Fi, Thriller	0.4
Ireland	The Lodgers	2017	IE	Brian O'Malley	English	Drama, Horror, Romance, Thriller	0.7
Ireland	Vivarium	2019	IE, BE, DK, CA	Lorcan Finnegan	English	Comedy, Horror, Mystery, Sci-Fi	1.1
Ireland	The Lobster	2015	IE, FR, GB, NL, GR	Yorgos Lanthimos	English	Comedy, Drama, Romance, Sci-Fi, Thriller	1.2
Denmark	The Neon Demon	2016	US, DK, FR	Nicolas Winding Refn	English	Horror, Thriller	1.2
Ireland	The Hole in the Ground	2019	IE, BE, GB, FI	Lee Cronin	English	Horror, Mystery	2.5
Denmark	The House That Jack Built	2018	DK, FR, DE, SE	Lars von Trier	English	Crime, Drama, Horror	3.6

(continued)

Table 10.4 (continued)

<i>Ecosystem</i>	<i>Title</i>	<i>Year</i>	<i>Producing countries</i>	<i>Director</i>	<i>Language</i>	<i>IMDb genres</i>	<i>Share of domestic admissions in total admissions (%)</i>
Lithuania	Vesper	2022	LT, FR, BE	Kristina Buozyte, Bruno Samper	English	Adventure, Drama, Sci-Fi	15.7
Denmark	Mænd & høns	2015	DK, DE	Anders Thomas Jensen	Danish	Satire, Comedy, Drama, Mystery, Sci-Fi	75.4
Denmark	The Salvation	2024	DK, GB, ZA	Kristian Levring	English	Action	19.0

I really like that director [who made] *The Killing of a Sacred Deer*. The *Lobster* was great, I love that film. So anything that he does I would want to see. And *The Favourite* as well and the new one that's coming out [...], if that goes into the cinema, now I'll go see that. What is it? *Poor Things*. [...] But although *The Killing of a Sacred Deer* doesn't have an Irish setting, it's probably just really Colin Farrell and Barry Keoghan. Is that the only Irish connection there?

Domestically and internationally successful films from small markets are thus mainly differentiated by their genre profile, their level of recognition on the international festival/awards circuit, and by their orientation towards domestic or international markets through either local resonance in their stories and creatives or international recognisability through language and stars.

DOMESTICALLY POPULAR FILMS WITH EXPORT SUCCESS

Table 10.5 lists the 14 films that were both among the top-performing domestic films in our seven small markets and among the top films in terms of exports. Many of the general criteria for success in both categories reappear.

Table 10.5 Titles that can be found in both the domestic top 10 of the seven countries and the top 70 exported films. Bold titles are adapted from literature. Titles with asterisks were either nominated for or received awards at the Cannes Film Festival or the Academy Awards

<i>Ecosystem</i>	<i>Original title</i>	<i>Prod. year</i>	<i>Prod. country</i>	<i>Original language(s)</i>	<i>IMDb genre</i>
Ireland	Room*	2015	IE, US, CA, GB	English	Drama
Denmark	Druk*	2020	DK, SE, NL	Danish, Swedish	Comedy, Drama
Ireland	Song of the Sea*	2014	IE, LU, BE, FR, DK	English, Irish	Adventure, Drama
Ireland	Sing Street	2016	IE, GB, US	English	Comedy, Drama, Music, Romance
Flanders	Girl*	2018	BE, NL	Flemish, French	Drama
Denmark	Ternet ninja	2018	DK	Danish	Comedy
Denmark	Retfærdighedens Ryttere	2020	DK	Danish	Comedy
Denmark	Fasandræberne	2014	DK	Danish	Crime, Mystery, Thriller
Denmark	Flaskepost fra P	2016	DK, DE, SE, NO	Danish	Crime, Drama, Thriller
Denmark	Journal 64	2018	DK, DE	Danish	Crime, Mystery, Thriller
Flanders	Patser	2018	BE	Flemish	Crime, Thriller
Denmark	Ternet Ninja 2	2021	DK, US	Danish	Animation, Comedy, Family
Croatia	Zvizdan*	2015	HR, RS, SI	Croatian	Drama, Romance
Ireland	An Cailín Ciúin [The Quiet Girl]*	2022	IE	Irish, English	Drama

We find in this list three animated films with a sense of cultural placing in their producing markets (*Song of the Sea* and *Ternet Ninja* 1&2), but no animations that tap into globally well-known IP or stories. Half of the films in this list received festival/award nominations (*) including Academy Awards (*Drunk, Room, The Quiet Girl, Song of the Sea*) and at Cannes (*Zvizdan, Drunk, Girl*). Even though most domestically popular small market films do not receive festival recognition, these outstanding successes lead domestic audiences to pay attention to domestic films. Talking about *Girl*, a male participant (age group 26–40) from Flanders explained that he watched it because of the coverage of its success at Cannes:

It was everywhere. Everywhere. [...] I mean, I think it's won, not the Palmes d'Or but maybe the second prize Un Certain Regard or the Best Film from young director or something. [...] So I mean if this happens, it's quite rare for a Belgian film to win a prize in Cannes. So, it was all over the news. Everyone was talking about the film, so that's how I found out about it.

The festival recognition of Lukas Dhont, *Girl*'s director, also nuanced the participant's generally more negative perception of Flemish films. This attitude illustrates the importance of festival successes for domestic audiences' perceptions of films from their own countries, even if the festival-oriented films are not the most watched at home or even watched by the individuals interviewed. Festivals and awards help raise awareness of domestic film and reflections by audiences concerning their own preconceptions about their national cinema.

A proven track record of characters and stories is another feature that unites many of the films in the list. Five of them were based on literary fiction (highlighted in bold). Among the 14 films, five were successors to previously successful films with the same or similar story worlds: the Department Q film series adapted from Jussi Adler-Olsen's books, *Checkered Ninja*, and the Celtic animation trilogy by Tomm Moore where *Song of the Sea* followed *The Book of Kells* (2009).

Material based on local literature and television as well as broader popular culture features highly in the domestic top 10 lists, showcasing how this creates attraction—for example, in the case of the Portuguese *O Pátio das Cantigas* (2015), a remake of a 1940s film classic, which

managed to extraordinarily unite Portuguese audiences across generations. Adaptations create attention among domestic audiences and motivate them to watch the films. Familiarity with source material among domestic audiences can, however, also create expectations that films cannot fulfil. On the Department Q films (also adapted by Netflix in a British version in 2025), a Danish participant, who was born in Norway, unfavourably compared the films to her broader knowledge of Nordic Noir crime, branding the film series as ‘mere entertainment’.

Regarding the level of local anchoring, all films except for *Room* were clearly set in the producing country and in local language(s). Talking about the action film *Patser*, a young Flemish participant (age group 18–25) explained that he watched the film because he liked previous work by the same creatives, but also because ‘it felt very local’. To understand what creates audiences’ sense of locality and recognition, it is instructive to consider this young Irish participant who remarked on *Sing Street*:

[...]It was quite realistic on how Ireland was back then, like the Christian brothers, how they were treating kids in school. I love that side of it. [...] here was a big kind of viewing point where I really enjoyed where I was ‘It’s not all kind of made up.’ [...] it was how Ireland was in that era, how people were treated at school and how there was always sides, how families were, how different families live, different privileges.

The film’s setting in the 1980s, however, was not within this participant’s lifetime. This reinforces the idea that perceptions of authenticity are not necessarily based on lived experience of what is depicted on screen but rather on a sense of recognisability which emerged from the viewer’s literacy in domestic culture and society. When audiences perceive the representation of their country to be constructed and/or not aligned with their individual experiences, this mismatch can become a problem. Speaking about *The Quiet Girl* (which was generally positively received by our participants), one participant (male, 55–64) explicitly rejected the film for its use of the Irish language: ‘I find it quite stilted [...]. People in Ireland don’t normally speak Irish. It’s always a production. It’s a state... You know, so to me it’s like falseness.’ Similarly, the Irish minority co-production *The Banshees of Inisherin* was branded as a film for ‘outsiders’ by one participant (male 25–34) who also claimed to not see any appeal in watching a film set in the Irish countryside when one lives in the country themselves.

These statements about domestically and internationally successful adaptations and representations reveal nuances in the perceptions of local placing. On the one hand, audiences appreciate domestic films if they can recognise elements of local culture represented. On the other hand, audiences may recognise certain elements of society and culture depicted, but perceive it to be unattractive, because it engages with an aspect of their society they prefer to maintain a distance from.

DISCUSSION

If being small is tough, squaring success with domestic and international audiences can be even more difficult. Few titles from small European markets have managed to achieve this outcome in recent years. In our analysis, we discussed issues such as the specific focus on certain genres and the importance of other factors such as festival recognition on distribution. Films' rootedness in local languages, their locations and references to (popular) culture and word-of-mouth help films from small markets attract domestic audiences. At the same time, on the international stage, films from small markets become successful on the back of transnational relatability, recognisability and validation within the international festival circuit. Despite this clear pattern, genre conformity or genre diversity is not valued in film funding criteria. This happens, for instance, in Portugal, a country with one of the lowest domestic admission rates in our sample. These assessments highlight the need for policies that are tailored for *either* local audiences *or* for international circulation to be conducted in parallel.

Needs of domestic and international audiences appear almost irreconcilable: Internationally successful films do not feature in the domestic top lists. An 'outsiders' view' on the exporting nation can in fact create alienation for domestic viewers, while stereotyped representations of Europeans are often present in successfully exported European films (Jones, 2024, pp. 94–95) and can create recognisability for audiences abroad (Bengesser et al., 2022, p. 160; Steemers et al., 2025, p. 90). The small market films that manage to square the circle of domestic and international appeal move in the middle ground between local recognition and international recognisability: most are often clearly rooted in the culture of their origin but with elements of international recognisability, be it international stars or locations, echoing a form of nostalgia for pop culture, or alignment with established genre brands like Nordic Noir.

Such recognisability may ease international audiences into foreign material while still being able to enjoy the ‘cultural mark-up’ (Jensen, 2023) of a representation of a different culture that comes with the potential for cultural distinction.

For domestic audiences, local cultural rootedness can be an attraction in and of itself—as evidenced by the settings and language properties of the top-performing domestic films. Still, critical voices among our participants emphasised how familiarity with the local cultural context creates a ‘familiarity discount’ because expectations towards quality of production and representation cannot necessarily be fulfilled, preconceptions about national cinema get in the way, or because seeing that which is already familiar is not enough of an appeal. National policies with a broader focus on genre variety and diversity of storytelling could help domestic audiences see small market films with new eyes.

Festival success or acclaim can bring domestic and international audiences together. In small markets, the rarity of such success manages to create extraordinary attention that may not only benefit the domestic attendance of the film itself, but also the general perception of domestic cinema. However, it needs to be stressed that while festival acclaim in general helps small market films travel internationally, the acclaim that connected domestic and international audiences in our cases was restricted to the Academy Awards and Cannes. Not only do they represent rare occasions of acclaim, but they also have high brand value attached because of the high recognisability of the awards, which manages to place the films clearly for audiences at home and abroad within the top tier of mainstream cinema (Oscars) and arthouse film (Cannes) (Jones, 2024, pp. 126–127).

Below these top-tier films, such clear placing is a problem for the competitiveness of European film. According to Anne Jäckel (2003), auteur film—in whatever form one can imagine—has become the genre *par excellence* of European films. This has created a situation where films that are domestically popular are those ‘shunned’ by European middlebrow and cosmopolitan arthouse audiences (Higson, 2021b: 224–5). In other words, arthouse/auteur-film branding is likely to prevent a broader diversity of film exports from Europe. Jones (2024) and Higson (2021b, p. 224) highlight the ways in which mainstream popular domestic films, when exported, may undergo a rebranding as arthouse or middlebrow. More broadly, though, the idea that there is only an international audience for arthouse and middlebrow drama from Europe restricts European film’s movements. A consideration of streaming helps to dispel this idea.

Chris Meir's (2024) analysis of recent Scandinavian film 'Originals' on Netflix highlights how local productions have sizable global popularity not based on auteur credentials or even the Nordic Noir brand, but based on plot twists (*Loving Adults*), melodrama (*A Beautiful Life*) and even comedy (*Asphalt Burning*).

Genre-oriented strategies emerge as another key element in broadening the reach of films from small markets. Because expensive genres like action and adventure are largely off-limits for small markets, we can see that horror and genre combinations with sci-fi elements are being produced by independent producers in several European markets with an international audience in mind. Those small market films whose genres do not necessarily involve a need for recognisable cultural representation—as drama and comedy do—are ideal for international distribution. But there might also be a missed opportunity at home. Such genre films seem not to reach domestic audiences even though the genres themselves were often deemed attractive by our participants. This calls for increased support for deliberate genre film production coupled with specific support that can increase its visibility at home. Indeed, the level of adherence to genre and the extent to which it is meaningful to audiences (whether in a conscious or unconscious way) is a point that deserves further inquiry and, potentially, an interesting avenue for future research around the competitiveness of films from small European markets.

The inherent instability of taste categories like arthouse, auteur cinema, middlebrow and genre film implies that European films possess more personal and idiosyncratic features than most of US-American output (reflecting a 'director-centric' approach to cinema), which has historically been developed around the concept of genre or the intentional hybridisation of genres. The question that arises from this reasoning is the need to revisit and reassess the importance of genre and the stylistic stability and predictability that comes with it.

The obvious alternative is siloing domestic from international markets and producing with only one of them in mind. Such an approach is evident when we observe that EU policy is often focused on international circulation (i.e. initiatives such as the Europa Cinemas network or specific schemes of funding targeting international circulation in the context of the Creative Europe programme), while domestic policies oscillate between chasing festival success or popularity. Considering this, one key question arises: are these policy objectives irreconcilable or are

there pathways that policymakers and stakeholders ought to pursue to square the circle?

Currently, small European markets lack a clear strategic outlook on exports, which large markets practice. As Kostovska (2024) has shown, these large market practices include the examination of market trends including territories and genre, establishing strategic co-production relationships, and capacity building for films with international appeal. Most small markets feature production incentives to attract foreign investment, but risk assuming the role of service providers or minor co-producers, which does not contribute to the visibility and exportability of the country's own production. To foster such strategic development, existing national funding schemes could be segmented between projects mainly targeting domestic or international audiences. This may include prioritising national funding of projects that have a clear exploitation model. For such planning, accessibility of audience profiles and data is key.

To avoid an increased strategic focus on export coming at the expense of domestic audiences, internationally focused support should consider capacity building for the benefit of domestic industries. An example would be building up local scriptwriting talent within exportable genres that are also underproduced for domestic audiences. Moreover, PR marketing and sufficient exhibition possibilities for domestic film is necessary for building domestic audiences—a goal that can in turn increase the value of a film in other distribution windows and territories.

Because small markets have more limited resources for public funding and financing incentive costs than their larger counterparts, the strategic development of exportability should remain a priority and direct EU funding to schemes designed to support this in the case of small markets. This would keep EU action in this area in line with the principle of providing support where national policy cannot be sufficiently effective and mitigate the risk that increased export orientation comes at the expense of funding/quality for domestic film. Concretely, policies supporting development, festival participation and distribution for internationally oriented films could supplement national production support for such projects.

CONCLUSION

Being small is a challenge, and policymakers need to make clear choices. For small European markets, it is currently very difficult, if not impossible, to simultaneously target national and international audiences with a single title. But meeting the needs of both audiences is not impossible when different titles are funded by different sources and developed accordingly with different pipelines. We also suggest that it is time for a re-evaluation of where the line between domestic and international audiences is placed. Our analysis shows that top-performing films from small markets are very different from the ‘Euromillions’ action or adventure films that mostly originate in large countries. They are different in terms of budget, genre and storytelling and, consequently, the competitive avenues they can explore are also very different. It is not sustainable for small markets to follow the ‘Euromillions’ logics. Targeted content strategies for domestic versus international audiences are necessary. At the same time, the two can be mutually beneficial as shown by the films that square the circle. The rare occasions of small market films’ festival success, for example, also attract domestic audiences, while popular locally placed stories can travel successfully when they contain elements of recognisability for international audiences. But recognisability must first be created, which is why European policy could support small markets in bringing more of their popular cinema to international audiences, while building capacity for genre diversification that can ultimately also benefit local audiences.

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Dancer in the Dark: Where Next for the European Union as a Global Film Enabler?

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OBJECTIVES AND APPROACH

The film industry occupies a distinctive position at the intersection of economic, political, and cultural dynamics, making it a strategic sector within the European Union's broader objective of integration. The European Film Industry has developed as a political project combining cultural and economic objectives and reflecting the EU's ambition to exercise

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influence as a regulatory, industrial, and cultural power. This project encompasses both internal and external dimensions, guiding the development of the film industry across Europe while also informing the EU's engagement with global audiovisual markets. Today, however, these ambitions are increasingly challenged by the accelerating process of platformisation and the growing power of global streaming services, which are reshaping production, distribution, and visibility in the industry. Understanding how these transformations affect the EU's capacity to sustain this project lies at the core of this book's purpose. In this context, the book pursued two main objectives:

Firstly, it assessed whether the EU's film sector currently disposes of the policy instruments, institutional commitment, and potential audiences necessary to act as a film enabler within global cultural politics and the audiovisual economy. Secondly, the book examined the extent to which assuming such a role could enhance the EU's capacity to rebalance global audiovisual flows, particularly in a context marked by evolving technological dynamics and the growing influence of platforms in the industry.

Addressing these objectives required combining various perspectives. The book brought together top-down analyses of policy and legal frameworks, examined their design and their potential impact on film production, distribution, and circulation within and beyond the EU, alongside bottom-up approaches that foregrounded the perspectives of film professionals, inside and outside the EU, and, crucially, of audiences, investigating their habits and interests. Moreover, this volume articulated analysis conducted at national and supranational levels, across large and small markets, and encompassed both the internal and external dimensions of EU action; thereby, it offered a comprehensive understanding of the EU's potential role as a film enabler. Finally, we addressed these objectives with an interdisciplinary lens and an international team of contributors, bringing different research approaches. Situated within social sciences, the range of disciplines includes political sciences, law, communication sciences, media industry, and international relations. This diversity of perspectives enabled the volume to approach the European Film Industry through its complex interface, where political, cultural, and economic dynamics intersect.

Before addressing these two objectives, it is worth recalling our definition of *film enabler*. Here, acting as a film enabler is understood not

simply as expanding market access, but as reinforcing the global governance of film in ways that respond to the needs of industry professionals, address structural market imbalances, and secure visibility for a diversity of voices and perspectives. This understanding is closely linked to the EU's long-standing self-positioning as a global normative actor, for whom the protection and promotion of cultural diversity have remained central principles of audiovisual policy, most explicitly articulated through the 2005 UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions. From this perspective, enabling film entails developing, protecting, and promoting the European Film Industry through national and supranational policies that allow it to flourish internally and externally. At the same time, it entails sustaining an international role that supports other film industries, recognises their contribution to the diversity of cultural expressions, and seeks to counterbalance the structural dominance of US audiovisual works in global markets.

In this sense, understanding the EU's role as a film enabler also requires special attention to its external dimension. Rather than approaching this role through perspectives associated with neo-colonial logics or the paternalistic undertones often embedded in soft power narratives, this book adopted a relational and situated approach to international cultural relations. To this end, the volume drew on research conducted with film professionals outside the EU (Turkey, South Korea, South Africa, Argentina, Brazil, Mexico) and included contributions from scholars of different national backgrounds, including Brazil, Turkey, and South Africa. This diversity of perspectives enabled an examination of how the EU's external audiovisual actions are interpreted and negotiated beyond Europe, and allowed the book to assess the extent to which such actions support more balanced forms of cooperation and the promotion of cultural diversity in global film circulation.

Within Europe, the book also paid close attention to the internal diversity of the EU, moving beyond the usual focus on its largest audiovisual markets. The volume emphasised the importance of understanding the perspectives of smaller markets and of countries in Central and Eastern Europe, where structural conditions, policy capacities, and industry dynamics often differ significantly. For this reason, the research included empirical work conducted in smaller European markets and brought together authors from a range of national contexts, including Croatia, Denmark, Estonia, Belgium, Ireland, Lithuania, and Portugal.

This approach allowed the book to offer a more nuanced and representative account of the European film industry and of the EU's role in international audiovisual relations.

Taken together, the findings of this volume allowed for a nuanced response to the two research questions guiding the book. First objective: *whether the EU's film sector has the policy tools, desire and potential audiences to fulfil the role of a film enabler in the global cultural politics and economy?* The analysis showed that the EU's film sector does possess a range of relevant policy tools to support a role as a film enabler in global cultural politics and the audiovisual economy. Instruments such as the AVMSD, institutions dedicated to promoting EU films abroad, and co-production agreements with countries outside the EU constitute central components of this policy framework and are largely supported by film professionals. At the same time, the book highlighted important limitations that call for further refinement. EU film policies continue to be shaped by structural tensions between national and supranational interests, as well as by internal differences between large and small markets.

Chapter 4 revealed how such tensions between supranational and national priorities are particularly visible in the EU's external film promotion strategies, underscoring the difficulty of translating policy ambitions into coordinated and effective action abroad. These structural asymmetries are further reinforced by platformisation dynamics. As Chapter 3 demonstrated, in smaller markets low investment rates and the absence of explicit diversity criteria significantly limit the impact of AVMSD investment obligations, while VOD services tend to prioritise high-budget, globally oriented productions, further marginalising smaller works. Concerns related to long-term competitiveness also extend beyond production. Chapters 4 and 5 highlighted the central importance of intellectual property retention, widely perceived by professionals as a key mechanism for sustaining the European Film Industry over time. Finally, Chapter 2 pointed to the need to (re)conceptualise the notion of the "prominence of European works" in order to counterbalance the adverse effects of automated recommender systems on the visibility and discoverability of European cinematographic content.

While EU policy instruments require further refinement for the EU to fully realise its role as a global film enabler, the findings of this volume pointed to a broad willingness within the film sector to move

in this direction. At the internal level, Chapter 5 showed that European film professionals expressed strong support for the AVMSD and called for more robust intervention at the EU level to protect and promote the European Film Industry. At the external level, Chapters 7 and 8 similarly indicated that professionals outside the EU also articulated expectations for a more active EU role as a film enabler. These contributions emphasised the importance of developing more balanced forms of cooperation that take local contexts and needs into account, while nonetheless revealing a clear interest in deeper engagement with the EU. These findings indicated that existing cooperation frameworks would benefit from revision, alongside greater investment in mechanisms that facilitate sustained and more equitable connections between European and non-European professionals.

Our chapters focused on audience analysis confirm the existence of potential audiences, allowing the EFI to act as an enabler, both within and outside the EU. Within the EU, it is worth distinguishing between local success (in the countries of origin) and success in the rest of the EU (the capacity of the film to circulate beyond its countries of origin). Chapter 10 recalled the existence of films locally successful, even in small markets. However, not all film industries are successful in exporting their films in the rest of the EU and, further, of the world.

Chapter 8 provided a solid foundation for interest in European cinema among international youth living in the EU. Chapter 9 confirmed that European cinema is artistically appreciated by young audiences internationally. The perception of European films is ambiguous. For example, Chapter 10 recalled the importance of festival awards or acclaim in attracting international audiences; on the other hand, Chapter 8 mentioned a perceived elite lens as a limitation to a broader appeal. Overall, there is a diversity of films in Europe, which is acknowledged by audiences, and should stay core in policymakers' and industry stakeholders' strategic decisions.

Regarding the second objective:... *in what ways taking such a role would strengthen the EU's capacity to counterbalance the currently dominant role in global audiovisual flows of the United States?* The findings suggest that assuming a more explicit role as a film enabler has the potential to strengthen the EU's capacity to counterbalance the dominant position of the United States in global audiovisual flows. The EU's external action emerged as particularly relevant in supporting other cinematographies that face structural constraints, as explored in Chapters 7

and 8. By assuming a more proactive enabling role and deepening cooperation with these markets, the EU could not only facilitate the circulation of European films beyond its borders but also contribute to the sustainability of other film industries, thereby reinforcing broader objectives related to cultural diversity.

This role becomes especially significant in the context of VOD, which is perceived as offering potential opportunities to expand the circulation of European content, as highlighted in Chapters 4 and 5. At the same time, the findings pointed to persistent challenges related to the visibility and discoverability of non-mainstream European works, particularly those originating from smaller markets, as indicated in Chapters 2 and 3. In this regard, the development of stronger regulatory frameworks and further adjustments to the AVMSD appeared as essential to support the European film industry and to counterbalance the structural dominance of US-based content in the VOD context.

A strong position to counterbalance the currently dominant role in global audiovisual flows will require policies that move beyond the support to production, placing greater emphasis on promotion, audience development, and distribution strategies.

RECOMMENDATIONS

The answers to these research questions, and more generally the analyses developed in these chapters, allowed us to derive the following policy recommendations.

First, there is a need to reinforce and complement the supranational and national levels of policy intervention. Both levels are important and can be further developed considering their current paths. Thus, Chapter 10 recalled that “EU policy is often focused on international circulation, while domestic policies oscillate between aiming at festival success or at popularity”. For national governments, it can also be a matter of keeping control of some tools, such as audiovisual co-production agreements for the French and Spanish governments (Chapter 4).

An important change that we can recommend at the supranational level is the revision of the Audio-Visual Media Services Directive (AVMSD), to prolong some changes introduced in the 2018 revision and more generally to take stock of major changes taking place in the last years such as the adoption of Generative Artificial Intelligence, further consolidation

in the audiovisual and related sectors, or the adoption of EU regulations (DSA, DMA, EMFA, AI Act).

Second, there is still more policy support going towards production than distribution and circulation. As Chapter 5 reminded, the European Film Industry “has historically centred policy attention and public funding mechanisms on supporting production”. In contrast, European policy needs to place greater attention on, and provide funding for, film distribution and circulation. Now, the EU and national policymakers are aware of the impact of digitalisation, and in particular of the dominance of US-based VOD platforms. The question is how to address such a situation, the threats, but also the opportunities it carries.

For example, the revision of the AVMSD could contribute to better circulation of European films through these platforms. Chapter 2 stated that the “prominence of European works”, once provided a clear-cut and legally binding definition, would better serve as an overarching principle that guides the EU Member States efforts to boost the EFI’s competitiveness through regulating the market behaviour of VOD platforms”. In the same way, Chapter 3 pointed at the “importance of designing regulatory frameworks in which investment obligations, quotas, and prominence rules are in synergy”.

Our chapters focused on audience analyses provide a wealth of information, some of which could be turned into direct recommendations. For example, Chapter 8 recommended enhancing genre diversity, which could orient which films get public funding. When it comes to circulation and marketing, Chapter 10 emphasised the visibility gained in top-tier festivals while Chapter 8 recommended leveraging peer-driven marketing through curated playlists and campus events to target international youth residing in the EU.

Third, the assessment, development, and implementation of film policies need to take into account the major differences among EU countries, particularly between larger and smaller markets. Thus, smaller markets can probably not follow France’s model of international film promotion as analysed in Chapter 4, and Chapter 10 rightly claimed that “it is not sustainable for small markets to follow the Euromillions logic”.

Taking into account the major differences among EU countries means allowing for some flexibility in the application of some rules but also, or even more, compensating current imbalances and fragmentation to aim at some level of harmonisation. Thus, Chapter 3 found national differences in policy ambition when it comes to the implementation of investment

obligations. However, harmonisation could be achieved by higher thresholds. When it comes to prominence, it could be by already requiring all countries to impose such prominence on VOD platforms.

Fourth, the EU film policy, in particular in relation to the rest of the world, requires more means and a long-term vision. Our analysis, and in particular Chapters 6 and 7, showed a willingness for collaborations that are sustained and long-lasting among film professionals from other countries. In this case, more means are needed to go beyond sheer film promotion, for example, for co-production markets, film festivals, and embassy events (Chapter 6). Chapter 10 also recalled the role of festival awards or acclaim, as they can bring domestic and international audiences together. The approach should be differentiated by region or country outside of the EU, as the situation is very different between, e.g. South Africa (see Chapter 7), South Korea, and Latin American countries (see Chapter 6).

FUTURE RESEARCH

While this volume seeks to encompass multiple dimensions of the European Film Industry and the EU's internal and external action, it also reflects the diversity and complexity of the contexts examined. At the internal EU level, differences between large and small European markets remain particularly significant, as policy instruments and production capacities vary considerably across national settings. At the same time, smaller markets also largely differ from each other, and a deeper understanding of their specific conditions would require more in-depth national-level analyses that fall beyond the scope of this volume. Similarly, the analysis of the EU's role as a film enabler at the international level draws on empirical material from six non-European countries, each characterised by distinct relationships with the EU, as well as specific institutional, market, and cultural challenges. While this approach allowed the identification of recurring patterns and shared needs, a fuller understanding of the EU's external role would benefit from broader comparative research encompassing a wider range of countries. In addition, the rapidly evolving technological environment associated with platformisation, particularly the growing influence of artificial intelligence in content production and visibility, introduces new dynamics that could not be fully captured within the scope of this volume and call for further investigation.

These limitations also point to several directions for future research. Further comparative work is needed to examine how different national and supranational regulatory configurations interact with platform-driven market dynamics over time, particularly in smaller markets and in countries with more limited production and distribution capacities. Future studies could also deepen the analysis of audience practices and algorithmic recommendation systems, in order to better understand how visibility, prominence, and discoverability of European works are shaped in practice within VOD environments. In addition, more sustained research on the EU's external cultural action in the film sector, especially from the perspectives of non-European professionals and institutions, would help to assess whether emerging cooperation models contribute to more balanced forms of global audiovisual circulation. Together, such research avenues would further clarify the conditions under which the EU might effectively operate as a film enabler in an increasingly platformised global audiovisual landscape.

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