



REBOOT

The Governance of Competitiveness in the European Film Industry

A Reader

Edited by Katharine Sarikakis
Mafalda Dâmaso · Tuuli Lähdesmäki
Fernando Ramos Arenas · Antonios Vlassis

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REBOOT

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FOREWORD

The European Film Industry (EFI) stands at a critical juncture. Facing a myriad of challenges—from disruptive digital landscapes and fragmented national markets to changing demographic shifts and societal demands, as well as the need for greater diversity and inclusion—the EFI must adapt and evolve to remain relevant and competitive both within Europe and globally. This book presents a necessary response to the urgent need for a comprehensive and multi-layered understanding of competitiveness and strategic guidelines that can help ensure the EFI’s sustainability and growth. The authors, esteemed experts in their respective fields, have joined forces to provide invaluable insights into the shortcomings, gaps and unanswered questions within the debate about the future of our industry.

Part A, “Policies”, investigates the intricate web of EU law and its impact on the audiovisual sector’s competitiveness. It examines the role of prizes in governing the industry and the critical issue of engaging young audiences.

Part B, “Practices”, shifts focus to the lived experiences and evolving imaginaries within the EFI. It explores how digital developments are reshaping cinema and investigates the interplay between creativity and competitiveness.

Part C, “Global Perspectives”, expands our gaze beyond Europe’s borders, examining the EFI’s presence and influence in fragmented international markets, comparing governance strategies and contrasting audiovisual regulation approaches worldwide.

This unique interdisciplinary approach allows for a holistic understanding of the EFI, its opportunities as well as its threats. By bringing together legal, economic, sociological and cultural perspectives, this book illuminates the complex dynamics at play in shaping Europe's film industry.

I am particularly grateful to play an ever so small part in promoting this unparalleled research and I trust that institutional bodies and stakeholders alike will take these findings and proposed scenarios to heart and translate them into meaningful action.

All that is left for me to do is give my heartfelt thanks to all the authors for their dedication to contribute to the development of a more innovative and globally competitive European Film Industry. Their collective effort has resulted in an indispensable resource for policymakers, industry professionals, academics and film enthusiasts alike.

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ABBREVIATIONS

ACT	Association of Commercial Television in Europe
AI	Artificial Intelligence
AMP	Audiovisual Mercosur Program
AV	Audio/Video VR
AVMSD	Audiovisual Media Services Directive
B2B	Business-to-Business
B2G	Business-to-Government
BFI	British Film Institute
CCIs	Cultural and Creative Industries
CDSMD	Copyright in the Digital Single Market Directive (Directive (EU) 2019/790)
CEDS	Common European Data Space
CHDS	Common European Data Space for Cultural Heritage
CHIs	Cultural Heritage Institutions
DAW	Digital Audio Workstation
E&Ls	Exceptions and Limitations (to copyright and related rights)
EBU	European Broadcasting Union
EC	European Commission
ECCD	European Coalitions for Cultural Diversity
ECSA	European Composer and Songwriter Alliance
EDIMA	European Digital Media Association
EF	European Film as the European Film Academy's prize category

EFC	European Film Club
EFH	European Film Heritage
EFI	European Film Industry
EFIE	European Film Industry and Ecosystem
EU	European Union
FERA	Federation of European Film Directors
FIAPF	International Federation of Film Producers Associations
G2G	Government-to-Government
GLAM	Galleries, Libraries, Archives, Museums
IDB	Inter-American Development Bank
INCAA	National Institute of Cinema and Audiovisual Arts
InfoSoc Directive	Information Society Directive (Directive (EU) 2001/29/EC)
IPRs	Intellectual Property Rights
IPTV	Internet Protocol Television
MEP	Member of the European Parliament
MERCOSUR	Southern Common Market
MIDI	Musical Instrument Digital Interface
NGOs	Non-Governmental Organisations
OBSERVACOM	Latin American Observatory for Regulation, Media and Convergence
OTT	Over-The-Top
RECAM	Specialized Meeting of Audiovisual and Cinematographic Authorities of Mercosur and Associated States
SEGIB	General Ibero-American Secretariat
TV	Television
TVWF	Television Without Frontiers
UNESCO CDCE UNESCO	Convention on the Protection and Promotion of the Diversity of Cultural Expressions
VoD	Video-on-Demand
VR	Virtual Reality
VST	Virtual Studio Technology
WIPO	World Intellectual Property Organization

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CHAPTER 1

The Governance of Competitiveness in the European Film Industry

*Katharine Sarikakis, Antonios Vlassis,
and Tuuli Lähdesmäki*

INTRODUCTION

Time and again, we are told, the European film and audiovisual sector is in crisis: some of those historical crises are persistent and, hence, a constant reminder of larger issues at hand, such as the nature of markets in Europe, linguistic diversity or challenges in production and consumption underpinned by changing technologies. Some appear to be emerging out of changes in consumption styles and film preferences of, perhaps, equally changing audiences across the years. Certainly, any foretold crisis would

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be only incomplete, if the factor “Hollywood” would be omitted. The US American film industry remains a constant nemesis to the European film industry: it seems unbeatable with its large, global studios and extensive worldwide distribution systems that have dominated the movie theatre landscapes across Europe, since the beginning of the twentieth century. Any discussion about the ways in and conditions under which European films are or can be successful quickly turns to one about the persistent dominance of Hollywood.

This is not just a European phenomenon, but a global one, where national film markets are now organised and analysed across two established pillars: the success of Hollywood and that of domestic national films. The presence of third country films, that is films originating in a country outside the EU or associated countries, has been largely negligible in the European area (Crane, 2013; Weber et al., 2024). In this almost ‘dual’ market organisation, it does not mean that national films disappear in the global film market: on the contrary, there is evidence that national films show resilience in the film market as a persistent popular niche, which however does not travel across borders as desired or expected, nor does it gain success globally (Higson, 2021). The question of what makes European films competitive and, subsequently, how can this competitiveness be enhanced at a European and national scale, but also towards global markets, has underpinned European public policy over several decades. Undeniably, change has been facilitated largely through technological developments, which nowadays are dominated by streaming platforms and the emergence of applications of Artificial Intelligence (AI). With important pivotal ‘moments’ at the timeline of changes, the question of competitiveness resurfaces (Dams, 2025).

Scholarship has explored key factors, which shape the competitiveness of the national and regional film industries. Predominantly, studies focus on the film industry as an industrial chain with strong commercial value and, in particular, on key features of competitiveness of national film industries, such as demand conditions, capital resources, facility resources, technological resources, human resources, market strategies and benchmarking (Howse & McLarney, 2006; Xian, 2022). By analysing the film industry through the government-firm interplay and its impact on the competitive advantage, but also the interconnection between enterprises, suppliers and related organisations (Moon & Yin, 2020; Parc, 2021), this approach deals with the factors that affect the development of a film industry in a neatly organised set of relations between state and market. As such,

it seeks to classify the global competitive position of a national film industry, to understand the conditions under which the revitalisation of a film industry, such as the case of South Korea (Parc & Moon, 2013) and of China (Moon & Yin, 2020), is expected to take place and to explain the key factors of Hollywood performance and dominance in the global movie economy (Crane, 2013). Furthermore, established scholarship on competitiveness is based on business and industry driven assumptions (Ranger, 2020), which highlight the economic architecture of national and transnational film industries, such as the case of Hollywood, South Korea or China and assess the overall impact of economic factors in the development of a(ny) national film industry. In other words, global conversations about what competitiveness entails have been developed in the scholarly, policy and market field with rather distinct and ring-fenced meanings.

A GOVERNANCE TURN TO THE STUDY OF THE FILM INDUSTRY

The present book offers to question and ‘reboot’ existing thinking about competitiveness in the European film industry (EFI), by introducing a ray of aspects that have been neglected, under-explored or analysed in fragmented ways. It aims to broaden ways of thinking about what competitiveness means and what it *can* mean for the *European* film industry. For the purposes of this book, ‘European’ is considered to be work that derives from any country and region belonging to the European Union, especially when it relates to matters of supranational policy, and also from countries and regions understood as European, beyond their formal association with the EU. This means that the UK is certainly considered European, and so are countries in the Western Balkans, as are non-EU eastern or northern countries. The book is concerned with deeper and dynamic approaches to European film, while centring its empirical and analytical account on EU and EU member states’ national levels. We do not provide case study accounts of big or small film markets, as this is work carried out successfully elsewhere over a long period of time. *Rather, we provide a multiperspectival account as to the core and hitherto peripheral areas of analysis on the question of gaps and underutilised strengths that may enhance film competitiveness of an industry that imagines, works and produces within Europe, by, with and for European peoples, not as an exclusive cultural and industrial fortress, but as an integral member of the global community.* Without

abandoning economic and market sensitised analysis, it expands the conceptual and analytical lenses, taking into consideration the needs, strengths and characteristics of Europe as a socioeconomic, cultural and political space, to include other dimensions, which are crucial to *making* and *governing* a competitive industry. The discussion offered here brings political, institutional and sociological analysis with governance perspectives (Acharya, 2017; Vlassis, 2022; Sarikakis, 2007, 2014; Sarikakis et al., 2024) and draws attention to the democratic and cultural dynamics embedded in decision-making about the EFI. It suggests that some of the key assumptions of the academic literature on competitiveness in the film industry leave little space for the discussion of the ways in which principles, understandings, perceptions and ‘ways of doing’—in other words ideas *and* practices—steer competitiveness in the European and global film industry. The priorities set in policies, such as cultural diversity or democracy, are as important as the diversity of understandings around the European dimension of film in local, European or global cultures, for example. Governance is shaped by the field of ideas and ideology, as different approaches to what must be prioritised in film support policy produce different outcomes. For some countries, it is important that cultural heritage is visible in AV works and this priority translates into a matter of filming location; this is then a criterion of subsidising film production. On a European level, co-productions are important as possible vehicles to commercial success; the support of independent filmmakers by public institutions is crucial as film is considered a cultural product. Dominant approaches to competitiveness also limit the range of understandings regarding the role that non-state or non-economic actors play in shaping conditions that are impactful on the EFI, within the context of ever changing societies. An exclusively market and economic approach remains too distant from the ways in which institutions, stakeholders and audiences, indeed citizens, understand, approach and relate to films and the film industry and by extension the imperative of competitiveness (Cheung et al., 2025). Thus, this book argues, we must turn our attention to the complex systems and processes involved in shaping the film industry, as a whole, through the intersection of actors, principles, practices, institutions, regulation and publics involved in the sector. Notably, we make a case of bringing attention to under-research dynamics, starting with the most profound, the powerhouse of the future EFI, young people.

We approach the study of the outcomes of the intersection of these processes from the perspective of *governance* of competitiveness in the

EFI, that is from the conceptual understanding that no one factor can determine a. what competitive means and b. how competitiveness is *steered* and *regularised*. This way, we pay due attention to political and social dynamics impacting the ways in which transformations can open up possibilities for actors and ideas to modify the standards and institutions that determine and impact on competitiveness (Jenson & Mérand, 2010; Saurugger, 2016). The concept of governance allows us to expand the field of enquiry as to the factors and forces underpinning, on the one hand, dominant understandings of competitiveness and, on the other hand, the *actual and potential* impact on competitiveness. These are national and supranational policy actors, institutions, industrial and professional networks, law and policy frameworks, the market and finances that have a regulatory and regularising effect on the sector. Importantly, the book extends its enquiry towards audiences and in particular young people as current consumers and future consumers and industry leaders.

Exploring competitiveness through the lens of governance allows us to investigate those processes, which operationalise change or maintenance of the status quo. Normative, structural and symbolic dimensions in both the conceptual and practical constructions of competitiveness, such as the role of ideas, principles and practices, are inseparable units of analysis in an environment where institutions, whether political or cultural, function both as vehicles of ideological positions *as well as* enablers of regulatory regimes that cement or resist change. For example, what it means to be competitive in a global market vs. in a global society determines political action, while the impact of technologies in distribution, but also in consumption of films, impacts further on definitions of competitiveness and corresponding policies (Mitric & Sarikakis, 2016). We are, therefore, concerned with what has been instrumental in determining scholarly and policy thinking with regard to the EFI as a “competitive industry” and the ways in which practices have cemented this approach.

As a second step, the book identifies shortcomings, gaps and unanswered questions derived from historical and multiperspectival studies around policies and practices as shaped and further shaping normative dimensions within the EU framework. Cultural governance, as exemplified by the EU’s Creative Europe programme, demonstrates how public policy can support globally oriented media production while simultaneously reinforcing strategic narratives that align with institutional values and soft power objectives (Özalpman & Sarikakis, 2018). We expand the

study of this stream of dynamics towards the global terrain, as we situate the EU as a global actor.

An important layer in this process is to explore the factor ‘future’, both as a definitional entity underpinning all regulatory activity, or indeed all actions which have a regulatory effect, and as a strategic and explorative direction, which might offer clues as to where regulation and conceptual thinking could and should be developing. Studying the governance of competitiveness requires a complex mode of analysis that is multiperspectival and multimodal, as it demands openness to the unruly universe of cultural production and consumption. The book, therefore, argues that the existing ways of investigating competitiveness would benefit from a dose of re-thinking in terms of governance dynamics and of analysing the micro- and macro-foundations of the governance of competitiveness (Vlassis, 2023). In this respect, the ideas, institutions and practices that are the foundational features of the governance of competitiveness in the European and global film industry are expected to shape the various ways of dealing with competitiveness in the European and global film industry.

We argue that competitiveness must be deconstructed and be understood as a political and social process for organising the relations of power and of regulation with respect to activities of stakeholders involved at multiple levels—local, national, regional and global. The governance of competitiveness in the European and global film industry is composed of informal and formal ideas, norms, institutions and practices, affecting several aspects in the activities of the stakeholders involved in the film industry and allowing them to seek to coordinate their actions in a context of polyarchic authority (Avant et al., 2010). As such, dealing with the governance of competitiveness is not so much a static approach for today’s power relations among actors involved in the film industry (Kolokytha & Sarikakis, 2018). Instead, the book sees the governance of competitiveness as a continuous process within which a constant game of exchanges, confrontations and bargaining is pursued. What can be derived from this is that the governance of competitiveness does not emerge—and is not maintained—spontaneously from economic data and business plans. Rather, it is largely a political act, shaped by conflict and competing political worldviews that aim to promote their own interests and according to their own values and distinct objectives regarding the nature and trajectory of the European film industry.

To elaborate further, the book explores the governance of competitiveness in the film industry ‘in situ and in action’ (Guiraudon, 2000),

interrogating the ways in which the actors involved shape specific views on the ways competitiveness is defined and approached. The governance of competitiveness in the film industry is the result of multiplex political process (Acharya, 2017; Kolokytha & Sarikakis, 2018) marked by formulation of views, expressed by multiple actors that adhere to a certain logic about the scope and objectives of a competitive film industry and that engage in debate and negotiation within specific institutional frames. As such, the book proposes to concentrate on the ways in which we can understand the framing of film competitiveness through actor interaction (Vlassis & De Beukelaer, 2019). It is not only the institutional form of actors, but the interactions with one another that shape governance outcomes and the ways in which film competitiveness is defined and perceived. Hence, ideas, institutions and practices in the emerging film competitiveness studies literature stress are not static, but they are linked to actors and to their preferences.

With this in mind, the governance of competitiveness in the film industry is associated with the goals and resources of a wide variety of actors, who mobilise strategies and promote their set of ideas and norms. Thus, the book treats the governance of competitiveness as process rather than as structure. In this sense, if the governance of competitiveness in the European and global film industry is a process, it is worthwhile posing the question as to who are the actors involved in this process; which kind of views these actors formulate and promote regarding the nature and objectives of film competitiveness; what forms of practices and policies have enhanced competitiveness and is missing; what are the different ways in thinking about competitiveness taking into account the European context of political and economic integration, cultural diversity, public service institutions and welfare, democratic values and solidarity. Importantly, given the context we also explore the perspectives that remain at the margins of the process. We are not interested in providing a ‘new’ definition of competitiveness, as such. This is a term that remains dominant in policy initiatives and has captured the ways in which the industry prioritises its actions for the content it creates, production decisions it makes and representations it supports. But we argue for an expanded and more complex, but accurate, way to view competitiveness as a fluid condition, even when it is closely connected to the dominant terms of marketability and revenues. The book highlights not only the fact that being subsumed by economic logics that work for other dominant markets is not the best pathway to higher desirability and success of European films. It also argues that

precisely because Europe and its film industry are not to be conceived around a (market) core (not even the often rehearsed ‘core’ of film markets of the UK, Germany, France or Spain), the ways in which EFI governance can best optimise the visibility and liability of the film industry are to be found precisely in those niches, corners and central stages of the variety of a polyglot and culturally polymorphous continent.

CONDITIONS AND THE MULTILEVEL CHARACTER OF THE EUROPEAN FILM INDUSTRY

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 ongoing political negotiation and shaped by specific contextual conditions (Vlassis, 2023). 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, institutional and 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 U.S.-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; Mitric, 2025; Jones, 2024; Meir & Smits, 2024).

As such, membership in key institutional bodies within the European film industry illustrates how the industry is continuously shaped by political negotiation and specific contextual circumstances. The membership of the European Film Agencies Directors (EFAD) —European association including public bodies, in charge of national funding for the audiovisual sector and with the responsibility to advise or regulate on all aspects of audiovisual policies—brings together 38 European countries: the European Union Member States, with two members for Belgium, as well as Iceland, Norway, the Republic of North Macedonia, Montenegro, Serbia, Switzerland, the United Kingdom, Ukraine, Bosnia and Herzegovina and Albania. Furthermore, the European Audiovisual Observatory (EAO), established within the framework of the intergovernmental organisation Council of Europe in 1992 to address the lack of information and transparency in the European audiovisual sector, currently comprises 40 Member States. The EU, represented by the European Commission, also holds membership, bringing the total to 41. Among the 40 members are also all states affiliated with the European Film Agency Directors, as well as additional countries such as Liechtenstein, Morocco, Georgia and Turkey. In addition, Eurimages, the film support fund of the Council of Europe, was established in 1989 and currently comprises 39 member states. In contrast to the EAO, Eurimages does not include the

UK and Morocco among its members, while Canada is a full member. It is noteworthy that the UK became a member of Eurimages in 1992 but withdrew in late 1995 (Mitric, 2025).

In line with this assertion, Russian Federation joined the EAO in 1992 and Eurimages in 2011; however, due to the Russian invasion of Ukraine in 2022, the Committee of Ministers of the Council of Europe decided to cease the membership of the Russian Federation in the Council of Europe and Russia's membership in the EAO and Eurimages was terminated. Finally, following Brexit, the UK chose to withdraw from participation in the Creative Europe programme, including its MEDIA strand, which is widely regarded as a cornerstone of the European Union's policy framework for the film and audiovisual sectors.

In this sense, shaped by social, political and institutional considerations, the definition of the European film industry is not fixed but continually evolving; it is a dynamic object of analysis influenced by shifting power relations and prevailing collective representations.

THE BOOK STRUCTURE

The book is organised in thematic sections that approach EFI's competitiveness from three interrelated perspectives. The first thematic section focuses on the policies through which the EFI and its competitiveness are regulated and governed in the EU within the broader context of European policies and initiatives. In this section, film policies are understood in a broad sense as more than just formal EU regulations and laws. They encompass a wide range of actions, strategies and initiatives undertaken by EU institutions and implemented by national governments and national and international film organisations to achieve specific goals. Here, film policy analysis comprises official documents, funding programmes, strategic plans and their implementation through diverse actions that shape decision-making and guide action on film. From this governance perspective, film policies reflect both the intentions and the practical efforts of actors to address challenges at the film sector and beyond and to promote changes. While the authors in this section recognise film as a pillar of the creative industries contributing to European cultural heritage, identities and markets, the chapters pinpoint persisting concerns, gaps and difficulties in EU initiatives aimed at promoting the EFI's cultural diversity, economic advancement and competitiveness.

The section starts with a chapter by Evangelia Psychogiopoulou, Apostolos Samaras and Laia Comerma analysing the ways in which EU legislative instruments, such as the Television without Frontiers Directive, the Audiovisual Media Services Directive (AVMSD), Creative Europe and the Recovery and Resilience Facility, conceptualise and promote competitiveness in the EFI and the audiovisual sector more broadly. The chapter highlights the dynamic nature of competitiveness in EU law, which incorporates both market and non-market considerations, shaping policies to enhance the industry's resilience and growth. Given the film industry's integral role within the broader audiovisual sector—and the close interconnection and mutual dependence between the two—the chapter extends beyond the film sector to include legislative instruments relevant to the entire audiovisual industry.

The following chapter brings the policy analysis to a much under-researched direction. Katharine Sarikakis, Angeliki Chatziefrimidou, Janina Jüngst and Gentiana Ramadani ask the question “where is the youth in the EU's strategies?” The chapter explores the historical oversight regarding the involvement of young people in the EFI and EU policy endeavours. After revisiting what competitiveness means and the role of creating strategies for the future, the chapter opens the discussion on the focus of young people not simply as audiences and consumers or even as future consumers. It pays attention to the ways in which young people as potential industry and policy leaders have been involved in any in the policies or been catered for by policies in the European area. Despite the recognition of the film's significance, there has been a lack of focus on engaging and empowering young people, hindering industry competitiveness and diversity. The authors identify moments where young people have been viewed not only as audiences, but also as active agents with the potential to shape the future EFI.

In the third chapter of the section, Tuuli Lähdesmäki and Kaisa Hiltunen approach film prizes as policy frameworks, examining how such prizes, namely the European Film Awards and the LUX European Audience Film Award and their awarding criteria, policy and procedures, are used as tools to shape cultural meanings, celebrate excellence and promote the EFI's competitiveness in the attention economy. The authors discuss the potential and limitations of the awards as a form of governance and as tools for enhancing the industry's regional and global presence. The section ends with a chapter by Pelin Turan and Caterina Sganga focusing on the Common European Data Space for Cultural Heritage

(CHDS), launched by the EU in 2021 and its potential to reinforce the competitiveness of the EFI by optimising digital cultural heritage accessibility, promoting digitisation efforts and facilitating the reuse of cinematographic content. The authors address the complexities of the CHDS, call for policy adjustments to maximise its impact and recommend aligning efforts on film heritage preservation with the CHDS to leverage its benefits.

The second thematic section moves from policy to practice, exploring the ways in which the regulation and governance of the EFI are reflected in film actions and initiatives. The chapters focus on a specific facet of the industry, illuminating its challenges, innovations and the strategic approaches employed to bolster its transnational competitiveness. Notably, these chapters investigate phenomena that are not always recognised or identified as important for the competitiveness of the EFI, namely youth film, documentaries, cinephile-based VoD platforms and film music. Fernando Ramos Arenas delves into the historical evolution of competitiveness of the EFI, exploring the ways in which changes in technology, audiences and among leading stakeholders have transformed the industry since the 1990s, impacting the classical paradigm of European cinema based on auteur and art house films and national productions and markets. Ramos Arenas uses the Cannes International Film Festival as a case study to demonstrate the ways in which European film still finds spaces, such as in film festivals, to negotiate its identity albeit within the context of a never ceasing pressure of the global audiovisual market. In the following chapter Kaisa Hiltunen and Tuuli Lähdesmäki explore the ways in which the European Film Academy engages with young people to cultivate future audiences for European cinema through the Young Audience Awards. The authors note that since 2012, the award-winning films have been serious dramas with difficult topics, resonating with European art house films. This does not necessarily reflect young people's film preferences since the awarding process has been influenced by film professionals. The next chapter of the section, by Laura Caballero Ruiz de Martín-Esteban, proposes a new understanding of film competitiveness in the European film industry, emphasising a balance between tradition and digital disruption. The author presents Filmin, a Spanish VoD platform created by a group of cinephiles, as a case study demonstrating how the digital shift supports a more sustainable market and intimate relationships with audiences, reinforcing European film culture practices and films. In Filmin, the tradition of European cinephilia is rethought through digital technology and

curation practice, offering a more direct and active approach to the user-audience. The second section ends with a chapter by Jean-François Trubert, Julie Mansion-Vaquié and Noémie Aouizerate. It explores the methodology of genetic critique for film music composition, aiming to understand composition's role in the value chain of film production. The chapter discusses the impact of production on music composition, various constraints influencing the creative process related to it and identifies strategies composers use to overcome aesthetic, technical and financial challenges.

The final thematic section extends the volume's European perspective and approaches the competitiveness of the EFI from a global point of view. The section delves into regulation and policy frameworks concerning audiovisual content and film distribution, consumption and co-production partnerships through the comparative analysis of film policies and practices across different continents and regions, including Europe, North and South America, South Africa and South Korea, that have strong cultural and/or commercial ties to the EU. Based on the comparative analysis and global point of view, the chapters seek to identify key challenges for competitiveness and propose recommendations for future international film policies and programmes. In the first chapter of the section, Marina Rossato Fernandes, Antonios Vlassis and Lucile Coenen explore the regulatory responses to the proliferation of VoD platforms, focusing on the EU's AVMSD and its impact on both Europe and Latin America. The authors examine the tensions and discourses surrounding VoD regulation, highlighting how the global activities of US-based platforms challenge the EU's normative influence abroad. The analysis underscores the challenge of maintaining the EU's normative stance amidst evolving global digital transformations.

In the second chapter, Mafalda Dâmaso, Luis Albornoz, M^a Trinidad García Leiva, Isabela Vargas Miranda, Antonios Vlassis, Marina Rossato Fernandes, Lucile Coenen, Elif Akçali, Melis Behlil and Ruken Doğu Erdede investigate the presence and performance of the European film industry in non-EU markets, including Argentina, Brazil, Mexico, South Africa, South Korea and Turkey. The authors explore the distribution, consumption and co-production partnerships in these markets, identifying policy and industrial challenges. The analysis aims to inform future international EU film policies and programmes. The section ends with a chapter by Alison Beale, who examines how competitiveness in media markets can align with social and cultural objectives, particularly in Canada. The

author discusses the relationship between economic success and the representation of women and other marginalised groups in the media. The chapter emphasises the interplay of cultural influence, economic resources and political authority in shaping media ecologies.

The concluding chapter by the editors draws together the main arguments from each section and their thematic focuses and poses questions for future research on the EFI. Drawing on the key findings, the conclusion poses recommendations on how the EFI could be better governed and its competitiveness increased. In particular, the editors identify the main challenges that characterise the industry today, identify a number of future scenarios and suggest further principles as well as avenues to navigate them. The chapter concludes with a reflection on the interconnection between the EFI and the EU's internal development, as well as the latter's role vis-à-vis the global governance of film and, more broadly, media and culture.

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PART I

Policies



EU Law and the Competitiveness of the Audiovisual Sector: The Trajectory of an Evolving Concept and Lessons for the European Film Industry

*Evangelia Psychogiopoulou, Apostolos Samaras,
and Laia Comerma*

INTRODUCTION

A complex area which is both a marker of identity and a factor in economic growth (Littoz-Monnet, 2007; Vlassis, 2022), the audiovisual sector caught the attention of the European institutions at an early stage. Efforts to formulate a distinct audiovisual policy at the European level began prior to the adoption of the Treaty of Maastricht establishing the European

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Union (EU or the Union). They were largely triggered by factors such as the emergence of satellite broadcasting, the proliferation of TV broadcasters and the rapidly increasing audiovisual trade deficit with the US—developments that culminated in the 1984 Green Paper on the establishment of the common market for broadcasting, specifically by means of satellite and cable.¹ Published by the European Commission (Commission), the Green Paper can be seen as the starting point for the audiovisual media policy of the then European Economic Community (EEC) (Burri Nenova, 2007). The creation of a common broadcasting market envisioned in it brought to the surface fundamental questions about competitiveness, which was approached mostly in economic terms. The establishment of a common market for television production, in particular, was considered essential to counterbalance “the dominance of the big American media corporations [...] and allow European firms to improve their competitiveness.”² Other relevant policy considerations centred on the fresh impetus provided by the cross-frontier distribution of broadcasting services and the use of innovative information and communication networks and technologies for increased efficiencies, boosting the competitiveness of the European economy in international markets.³

Since then, policy rhetoric has evolved substantially and the Union’s audiovisual policies—initially directed primarily at television but also at the film industry, which forms an integral part of the audiovisual sector, and more recently at multimedia and videogames—have been required to match and balance distinct priorities. These reflect the socio-political and cultural role of the audiovisual media, along with economic and industrial policy concerns (García Leiva & Albornoz, 2021). Situated at the crossroads of the economy and the cultural realm, the audiovisual

¹ Commission of the European Communities, *Television without Frontiers. Green paper on the establishment of the common market for broadcasting, especially by satellite and cable*, COM(84)300 final, 14.6.1984.

² *Ibid.*, p. 47.

³ *Ibid.* See indicatively p. 38, 47 and 66.

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sector embodies cultural, artistic and other creative expressions, playing an indispensable role in the preservation and promotion of cultural diversity. Concurrently, it makes a key contribution to growth and innovation. As such, it oscillates between intrinsic value and market value and is also important for European societies from a democratic, educational and human rights point of view (Psychogiopoulou, 2021). The pressure to square various aspects of the audiovisual sector—cultural, democratic and social, for instance, but also economic and industrial—has had a marked bearing on the Union’s action targeting the audiovisual industry (Michalis, 2014). In this context, competitiveness has been somewhat stable as a policy consideration imbuing policy development, even if the ways in which it has been conceptualised and operationalised by the EU institutions have not been static and continue to evolve.

This chapter aspires to capture the complexity that characterises EU action in the audiovisual sector by examining the ways in which the EU institutions have addressed competitiveness in policy-making and sought to promote it. The analysis sheds light on the ways in which considerations of competitiveness have accompanied and permeated EU audiovisual governance and their interaction with other policy considerations that have infused it. Such analysis is crucial for the European film industry (EFI) and *its* competitiveness, given that EU audiovisual policy also includes an EFI component, and film is situated within—and is intrinsically interconnected with—the wider spectrum of audiovisual content.

Against this background, this chapter investigates key dimensions of competitiveness in legislative acts like the Television without Frontiers Directive and the Audiovisual Media Services Directive. It also delves into EU legislation establishing key funding instruments like Creative Europe which targets the cultural and creative sectors (CCSs), with a specific emphasis on the audiovisual sector, including the EFI, and more recently, the Recovery and Resilience Facility (RRF), the cornerstone of Next Generation EU (NGEU), which was adopted to support the implementation of ambitious reforms and investment at Member State level in response to major structural challenges facing the Union, including those affecting the CCSs. These instruments are by no means exhaustive of the EU’s audiovisual policy agenda and its film dimension (see for instance, Herold, 2018; Psychogiopoulou et al., 2025; and Rossato Fernandes, Vlassis and Coenen; and Turan and Sganga in this volume). However, they constitute key components of this agenda, highlighting the diversity of both rule-making and funding tools involved, and illustrate the various

ways in which the audiovisual sector is addressed through EU intervention—both *directly* in its own right and *indirectly* through instruments not specifically focused on audiovisual matters.

The analysis is structured as follows. The section that follows explores the EU institutions’ understanding of competitiveness in EU legislative instruments in the context of efforts to establish an internal audiovisual market in which the free provision of audiovisual services is ensured. The section after that focuses on the Union’s funding instruments of relevance to the audiovisual sector and how these consider competitiveness. Our study of the aforementioned acts—those engaging in rule-making for the Union’s audiovisual single market and those providing financial support—reveals competitiveness to be a rich concept that combines and accommodates a wide range of policy considerations, both market and non-market. It also shows that the concept of competitiveness is becoming increasingly interlinked with other key values of the EU, such as cultural and linguistic diversity, solidarity and resilience, as well as respect for fundamental rights, in particular freedom of expression, artistic freedom and equality.

COMPETITIVENESS IN THE EU LEGAL FRAMEWORK FOR THE AUDIOVISUAL SINGLE MARKET

Since the late 1980s, the Union has introduced a succession of legislative initiatives to govern the free movement of audiovisual services. The legislative action taken reveals a progressively evolving legal framework (Parcu & Brogi, 2021: Part III; Ranaivoson et al., 2023) aimed at removing barriers to the freedom to provide and receive audiovisual services and at promoting fair competition. The major turning points in the Union’s legislative activity would ultimately bring both “linear” services (i.e. conventional television broadcasting) and “non-linear” services (such as the on-demand audiovisual media services that have emerged in recent decades) within its ambit. From the outset, they introduced requirements for the promotion of European content—commonly referred to as “European works,” encompassing a range of formats including films, telefilms and television series. These legislative interventions have taken place against a backdrop of important challenges for the audiovisual sector and the EFI. As aptly observed by the European Audiovisual Observatory (EAO), “European films and other audiovisual works are culturally valuable, they face strong competition from outside Europe, and they suffer

from a somewhat weak circulation outside their country of origin” (EAO, 2019, p. 1). There have thus been various compelling reasons for regulatory intervention at the EU level, besides ensuring the proper functioning of the internal audiovisual market.

Council Directive 89/552/EEC (Television without Frontiers Directive; the TWFD) was for two decades the main regulatory instrument for the audiovisual sector in Europe.⁴ The TWFD was based on (what were at the time) Article 57(2) (relating to the right of establishment) and Article 66 (relating to the freedom to provide services) of the Treaty establishing the EEC (TEEC). As a single market initiative, its main aspiration was to create a common broadcasting area within the EEC in which the unconstrained provision of television broadcasting services would be guaranteed on the basis of the principle of *mutual recognition*, coupled with the new approach to regulatory intervention followed by single market measures after the mid-1980s. Resembling “a minimalist industrial policy” (Micova, 2021, p. 280) and operating pursuant to the country-of-origin principle, under which broadcasters are required to comply only with the law of the Member State in which they are established rather than that of the country of reception, the TWFD laid down minimum rules to “ensure the transition from national markets to a common programme production and distribution market” (Psychogiopoulou, 2021, p. 36).

Although competitiveness was not explicitly mentioned anywhere in the text of the TWFD, ensuring the free movement of broadcasts essentially meant establishing conditions of fair competition and reducing disparities between Member States’ laws. By abolishing certain obstacles to the free provision of television broadcasting services, the TWFD employed the notion of “competition” as a factor in development within the common market for television broadcasting. At the time of the introduction of the Directive, producers in the EEC were at a competitive disadvantage due to their being “small, fragmented, and linguistically separate” (Schwarz, 1991, p. 352), whilst producers from the US both maintained significant interests in the expanding EEC audiovisual market and benefited from being able to program for a single multi-million household

⁴ Council Directive 89/552/EEC of 3 October 1989 on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the pursuit of television broadcasting activities (Television without Frontiers Directive) [1989] OJ L 298/23.

market (Schwarz, 1991; Wilkins, 1991). The industrial mindset that characterised the European content requirements—the so-called “European quotas” which required TV operators to reserve more than half of their transmission time for European works, and covering European works created by producers who are independent of broadcasters, sought to sustain the competitiveness of the audiovisual industry by correcting imbalances arising from the establishment of the common broadcasting market. The quotas rested on the recognition that the creation of a common broadcasting area required, besides the elimination of obstacles to the free movement of broadcasts, the promotion of structural factors favouring European audiovisual content creation and distribution (Psychogiopoulou, 2021). That securing the free flow of broadcasts could not in itself guarantee a competitive European audiovisual industry that would be able to benefit from the integrated market pointed to the need for complementary measures. Significantly, the legislative birth of the European quotas also had a cultural rationale: establishing conditions favouring the production and distribution of European audiovisual works by creating a demand for European-made content would ultimately encourage cultural creation and dissemination, thereby facilitating the circulation of different cultures in Member States’ broadcasts. Thus, the competitiveness angle of the TWFD fit the tenor of the time in relation to the single market aims pursued and was associated with market-building as well as industrial and cultural considerations (Craufurd Smith, 2015).

In 1997, with the Treaty of Maastricht in force, a first amendment to the TWFD was enacted by Directive 97/36/EC with a view to updating the rules and achieving a sufficient degree of legal certainty.⁵ The 1997 TWFD maintained the competitiveness mindset of its precursor through a raft of measures designed to correct legislative disparities in Member States and ensure free (and fair) competition while preserving the industrial and cultural facets of the European content requirements and protecting values and fundamental principles at the Member State level, such as

⁵ Directive 97/36/EC of the European Parliament and of the Council of 30 June 1997 amending Council Directive 89/552/EEC on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the pursuit of television broadcasting activities [1997] OJ L 202/60. The amendments focused on such aspects as the principle of jurisdiction (how a Member State is determined to be responsible for a TV service), the protection of minors, events of major importance for society, teleshoping, etc.

pluralism, language and the public interest in terms of the TV's role in information, education, culture and entertainment.⁶

The TWFD would then be amended more radically by Directive 2007/65/EC,⁷ which was devised to promote a transversal approach to European audiovisual governance. The 2007 revision of the TWFD sought to introduce a comprehensive regulatory framework for *all* audiovisual media services and to create a level playing field between traditional broadcasters, who were subject to the heavier regulation laid down in the TWFD and new media players who, though they provided the same or similar audiovisual content on-demand, benefited from the less burdensome regulation laid down in Directive 2000/31/EC, known as the e-Commerce Directive, for information society services (Valcke et al., 2008).⁸ As stated in the preamble to the 2007 amended version of the TWFD,⁹ new technologies in the transmission of audiovisual media services called for the regulatory framework to be adapted in order to: take account of structural changes and the spread of information and communication technologies (ICT); address the impact of technological developments on business models; and ensure optimal conditions of competitiveness and legal certainty both for Europe's information technology sector and its media industries and services. In addition to technological advances and their effects, the EU's free-market and competition paradigm remained particularly pronounced. Moreover, as a factor in competitiveness, the Directive also underlined issues such as protecting minors, human dignity and pluralism,¹⁰ and linked competitiveness to the country-of-origin

⁶ Ibid., Preamble, Recital 44.

⁷ Directive 2007/65/EC of the European Parliament and of the Council of 11 December 2007 amending Council Directive 89/552/EEC on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the pursuit of television broadcasting activities [2007] OJ L 332/27.

⁸ Directive 2000/31/EC of the European Parliament and of the Council of 8 June 2000 concerning certain legal aspects of information-society services, in particular electronic commerce, in the Internal Market (Directive on electronic commerce) [2000] OJ L178/1. The e-Commerce Directive, which was adopted on the basis of Article 47(2) of the Treaty establishing the European Community (TEC), in conjunction with Articles 55 and 95 TEC, would provide the foundational legal framework concerning online services in the context of the EU internal market for years to come. It sought to remove obstacles to cross-border online services and remains in force, even though conditions have changed substantially since its adoption.

⁹ Directive 2007/65/EC, Preamble, Recital 1.

¹⁰ Ibid., Preamble, Recitals 3, 8, 37, 45.

principle both as the cornerstone of European audiovisual governance and as an asset for online and other new media providers (Valcke & Stevens, 2007). As such, it emphasised that, in order to promote a strong, competitive and integrated European audiovisual industry, only one Member State should have jurisdiction over any given audiovisual media service provider.¹¹ Furthermore, while the European quotas remained in place for traditional audiovisual media services, the amended TWFD contained provisions applicable to the emerging on-demand audiovisual media services which addressed the production of, and access to, European works.

The TWFD and its amendments were codified in 2010, in the interests of clarity and rationality, by Directive 2010/13/EU (Audiovisual Media Services Directive; the AVMSD).¹² The “descendant” to the TWFD, the AVMSD was adopted on the basis of Article 53(1) of the Treaty on the Functioning of the European Union (TFEU) (relating to the right of establishment), in conjunction with Article 62 TFEU (relating to the freedom to provide services). In the years that followed, the 2010 AVMSD constituted the EU’s main regulatory instrument for the audiovisual sector. It adopted a more technology-neutral regulatory approach to linear and non-linear audiovisual services (van Eijk, 2009; Pauwels & Donders, 2011) and maintained several elements contained in the 2007 TWFD, including the need to ensure optimal conditions of competitiveness and legal certainty in the light of technological developments,¹³ and to approach competitiveness from the protection of minors and human dignity perspectives.¹⁴ Moreover, the 2010 AVMSD retained the provisions vis-à-vis promoting the distribution and production of European works, along with the distinction drawn in this regard between conventional audiovisual media services and on-demand audiovisual media services.¹⁵ Also retained were the reporting requirements, imposed in 2007 on the Commission towards the European Parliament, the Council, and the

¹¹ Ibid., Preamble, Recital 28.

¹² Directive 2010/13/EU of the European Parliament and of the Council of 10 March 2010 on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services (Audiovisual Media Services Directive) [2010] OJ L95/24.

¹³ Ibid., Preamble, Recital 4.

¹⁴ Ibid., Preamble, Recital 47.

¹⁵ The wording of Article 13 (which addressed on-demand audiovisual media services) and the wording of Articles 16 and 17 (addressing traditional broadcasting) of the 2010 AVMSD was equivalent to the wording of Articles 3i, 4 and 5 of the 2007 TWFD, respectively.

European Economic and Social Committee, vis-à-vis changes contemplated to the regulatory framework in light of considerations pertaining, inter alia, to the competitiveness of the sector.¹⁶

In November 2018, Directive (EU) 2018/1808, amending the 2010 AVMSD, was published,¹⁷ in an effort to stop additional regulatory gaps concerning the provision of audiovisual media services. As noted in the Directive's preamble,¹⁸ the audiovisual media services market had progressed remarkably and with considerable speed, due to the ongoing convergence of television and internet services, while new types of services and user experiences had emerged and viewing habits, particularly those of younger generations, had changed significantly. This made it necessary for the Union to revise its legal framework so as to accurately capture this evolution while remaining faithful to objectives including cultural diversity and pluralism, along with promoting fair competition and guaranteeing the proper functioning of the internal market. The promotion of the distribution and production of European works as a measure that pursues competitiveness concurrently with industrial and cultural objectives also remained clearly present. Thus, while the rules on television broadcasting services were left largely unaltered, requirements for the promotion of European works by on-demand audiovisual media services were reinforced. Article 13 prescribes a minimum of 30% European works in the catalogues of providers of on-demand audiovisual media services and helpfully combines it with requirements for the prominence of European content, allowing such content to be easily discovered.¹⁹ The essence of Article 13(1) is to ensure that video-on-demand (VoD) providers actively contribute to the promotion of European works. Notably, for VoD services, the Commission considers it more appropriate to calculate the share of European works in catalogues based on the number of *titles* rather than transmission (viewing) time.²⁰

¹⁶ See Art. 33 of the 2010 AVMSD and Art. 26 of the 2007 TWFD, respectively.

¹⁷ Directive (EU) 2018/1808 of the European Parliament and of the Council of 14 November 2018 amending Directive 2010/13/EU on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services (Audiovisual Media Services Directive) in the light of changing market realities [2018] OJ L303/69.

¹⁸ Ibid., Preamble, Recital 1.

¹⁹ Art. 13(1) of Directive 2010/13/EU, as amended by the 2018 AVMSD.

²⁰ Communication from the Commission, Guidelines pursuant to Article 13(7) of the Audiovisual Media Services Directive on the calculation of the share of European works in on-demand catalogues and on the definition of low audience and low turnover [2020] C 223/10.

Accordingly, in the case of feature and television films, each film is considered a single title in the catalogue while for TV series, one season is generally treated as one title. Calculating series by seasons is intended to ensure similar treatment with feature (or television) films and to reduce potential incentives for providers to favour European works of longer duration (e.g. series or other formats with many episodes over feature films) in order to meet the 30% requirement.²¹

By means of the 2018 AVMSD, Member States are also allowed to lay down obligations for *all* media operators under their jurisdiction to contribute to audiovisual production through direct investment in content or contributions to national audiovisual and film funds, which brings the obligations for linear and non-linear services into alignment (García Leiva & Alborno, 2021).²² Moreover, they can bring media service providers established in other Member States, but targeting their territories through the services they provide, within the scope of the rules on financial contributions to funding schemes.²³ This is a stark departure from the country-of-origin principle according to which media service providers shall comply with the rules of the Member State in which they are established. Indeed, while the 2010 AVMSD had strongly affirmed the latter, that approach was called into question in its 2018 revision, given that it could no longer effectively prevent so-called “jurisdiction shopping practices” from escalating.

COMPETITIVENESS IN EU FUNDING INSTRUMENTS ADDRESSING THE AUDIOVISUAL SECTOR AND THE EFI

Turning to funding instruments, the Union supports its audiovisual industry and European film through various programmes founded on a broad array of legal bases, including the cultural one, which from the Treaty of Maastricht onwards enables the adoption of so-called “incentive measures” to support creativity in the audiovisual sector (Irion & Valcke, 2015) (now

²¹ At the same time, some audiovisual productions may entail higher production costs compared to other catalogue items. For instance, in the case of high-end fiction where an episode has a duration and production cost comparable to that of a feature film, national authorities may assign a higher weighting to these works.

²² See Recital 36 of the 2018 AVMSD and Art. 13(2) of Directive 2010/13/EU, as amended by the 2018 AVMSD.

²³ See Art. 13(2) of Directive 2010/13/EU, as amended by the 2018 AVMSD.

Article 167(5) TFEU).²⁴ Key funding programmes have been the various MEDIA (*Mesures pour Encourager le Développement de l'Industrie Audiovisuelle*) lines of action, which are today part of the Creative Europe programme, under Regulation (EU) 2021/818,²⁵ accounting for 58% of the overall programme budget (Vlassis, 2022). Most recently, the Recovery and Resilience Facility (RRF),²⁶ which was created in the aftermath of the COVID-19 pandemic, supports measures to promote the CCSs, covering the audiovisual sector, and help them become more resilient to contemporary challenges.

Competitiveness in the Light of the MEDIA Programmes

Direct references to competitiveness were less common in the legal acts establishing the first MEDIA programmes in the years before 2000 (i.e. the MEDIA programme 1991–1995 and the MEDIA II programme for the period 1996–2000).²⁷ They became more common from the MEDIA Plus programme²⁸ and subsequently.²⁹ Creativity and innovation appeared as major factors from the very first programmes, and cooperation among

²⁴ See Art. 128(2) of the Treaty establishing the European Community (TEC), in conjunction with Art. 128(5) Treaty establishing the European Community (now Art. 167(2) TFEU, in conjunction with Art. 167(5) TFEU).

²⁵ Regulation (EU) 2021/818 of the European Parliament and of the Council of 20 May 2021 establishing the Creative Europe Programme (2021 to 2027) and repealing Regulation (EU) No 1295/2013 [2021] OJ L 189/34.

²⁶ Regulation (EU) 2021/241 of the European Parliament and of the Council of 12 February 2021 establishing the Recovery and Resilience Facility [2021] OJ L 57/17.

²⁷ Council Decision 90/685/EEC of 21 December 1990 concerning the implementation of an action programme to promote the development of the European audiovisual industry (Media) (1991 to 1995) [1990] OJ L 380/37; and 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) [1995] OJ L321/25.

²⁸ 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) [2000] OJ L336/82.

²⁹ See 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) [2006] OJ L327/12; and Decision No 1041/2009/EC of the European Parliament and of the Council of 21 October 2009 establishing an audiovisual cooperation programme with professionals from third countries (MEDIA Mundus) [2009] OJ L288/10.

countries and stakeholders was generally viewed as crucial for the competitiveness and growth of Europe's audiovisual industry, with certain provisions addressing specifically the EFI.

The first MEDIA programme, from 1990, adopted on the basis of the flexibility clause of Article 235 TEEC,³⁰ understood competitiveness, on the one hand, as the supply capacity of European works and, on the other, as the competitive environment within the then EEC, with a particular focus on small and medium-sized enterprises (SMEs) and Member States with a smaller audiovisual production capacity and/or limited geographical area.³¹ It considered competitiveness primarily through the lens of the single market. It thus focused mostly on the intra-Union aspects, that is promoting competitiveness within the single market and the interdependence between the various sectors of the audiovisual industry with a view to securing better returns on investment, wider dissemination and greater public impact of European films and audiovisual works, but it also called for increasing the share of world markets controlled by European production and distribution companies.³² It examined how using a variety of means of distribution could be helpful for competitiveness and it acknowledged that improving the economic and commercial management skills of audiovisual professionals was a key factor in enabling the sector to take full advantage of the single market.³³

Five years later, the MEDIA II programme, based on Article 130(3) of the Treaty establishing the European Community (TEC) (industry), started to focus more specifically on global competitiveness as a route to growth and employment, as well as on the use of new techniques at the development stage of production projects.³⁴ It defined competitiveness as the distribution potential of audiovisual and cinema works.³⁵ Thus, distribution potential and new technologies were the two main factors linked to competitiveness. Moreover, the programme paid special attention to

³⁰ Should action by the Community prove necessary to attain, in the course of the operation of the common market, one of the Community's objectives, without the TEEC having provided the necessary powers, Article 235 TEEC allowed the Council, acting unanimously on a proposal from the Commission and after consulting the European Parliament, to take appropriate measures.

³¹ Decision 90/685/EEC, Art. 2.

³² Ibid.

³³ Ibid.

³⁴ Decision 95/563/EC, Art. 2.1.

³⁵ Ibid., Art. 2.2.

audiovisual promotion, specifically promoting cinema attendance for European films outside their national territory through a subsidy³⁶ and through promotion by means of television broadcasting.³⁷ Following up on the unequal conditions in the Member States, it looked to level up European countries with a low audiovisual production capacity and/or restricted geographical and linguistic area, with a special focus on SMEs.³⁸ This was considered key to deepening the single market. Significantly, linguistic diversity was incorporated as a structural factor for determining the level of support that the audiovisual sector might need to enhance its competitiveness in terms of circulation, transnational distribution and audience.³⁹

Moving on to the 2000s, MEDIA Plus, which was also based on the industrial legal basis (then Article 157(3) TEC), was the first programme to relate the concept of competitiveness to that of cultural diversity, considering the role that Europe's cultural diversity and the specific conditions in restricted linguistic areas can have on the development of a strong and competitive European audiovisual industry.⁴⁰ It recognised that the audiovisual sector plays a special role in sustaining cultural pluralism,⁴¹ and that there was a need to help guarantee a place for the European audiovisual sector in the global economy so as to promote cultural diversity effectively at the international level.⁴² New technologies, public support, the potential of SMEs, start-ups, high-tech firms and micro-enterprises⁴³ as well as the industry's access to capital markets⁴⁴ were seen as key factors in competitiveness and the framework increasingly encompassed international markets, where it was thought that European audiovisual works should increase their competitiveness.⁴⁵

The MEDIA 2007 programme, for its part, enacted on the basis of Article 150(4) (vocational training) and Article 157(3) (industry) TEC, clearly associated competitiveness with increasing the market share in

³⁶ Ibid., Annex, 1.2.1(b).

³⁷ Ibid., Preamble, Recital 13.

³⁸ Ibid., Art. 2.2.

³⁹ Ibid.

⁴⁰ Decision 2000/821/EC, Preamble, Recital 2.

⁴¹ Ibid., Preamble, Recital 16.

⁴² Ibid., Preamble, Recital 27.

⁴³ Ibid., Art. 1.2(a)

⁴⁴ Ibid., Preamble, Recital 23.

⁴⁵ Ibid., Preamble, Recitals 29-30.

Europe of non-national European works.⁴⁶ It recognised that developing an industry with powerful and diversified content would strengthen the audiovisual sector economically, and acknowledged that this would in turn enable the audiovisual sector to play its cultural roles more effectively, promote EU diversity and enhance European cinematographic and audiovisual heritage.⁴⁷ The main aspects of competitiveness were here considered to include cooperation on aspects pertaining to training, development, distribution and promotion, openness of the programme to recently acceded Member States, loan financing, the increased transparency and accessibility of financial and legal statistics and information concerning the European audiovisual market, enhanced data availability in different countries and increased private investor confidence.⁴⁸ Other elements such as creativity and the cultural appeal of European audiovisual works were also listed as positive factors for promoting the competitiveness of the European audiovisual industry.⁴⁹

Finally, the MEDIA Mundus programme, founded on the basis of Articles 150(4) (vocational training) and Article 157(3) (industry) TEC, situated competitiveness in the context of the Lisbon agenda, which sought to transform the Union into “the most competitive and dynamic knowledge-based economy in the world capable of sustainable economic growth with more and better jobs and greater social cohesion.”⁵⁰ This brought knowledge, information exchange and international networking to the forefront as a key factor in competitiveness.⁵¹ The MEDIA Mundus programme sought to improve access to third country markets and to build trust and long-term relationships.⁵² It thus centred on the external dimension as a way of grasping the new opportunities created by international markets and globalisation.⁵³ In line with this global focus, this MEDIA programme sought to promote competitiveness through partnerships with third countries, co-productions, international sales, and the promotion, circulation and visibility of European works in third countries

⁴⁶ Decision 1718/2006/EC, Preamble, Recital 1.

⁴⁷ *Ibid.*, Art. 1.

⁴⁸ *Ibid.*, Preamble, Recitals 13, 15, 16-17; and Art. 18.

⁴⁹ *Ibid.*, Art. 1.2.

⁵⁰ See Lisbon European Council, Presidency Conclusions, 23-24 March 2000, at para. 5, <<https://www.europarl.europa.eu/summits/lis1.htm>; accessed 2 February 2024.

⁵¹ Decision 1041/2009/EC, Preamble, Recitals 1, 17, 20; and Art. 5.

⁵² *Ibid.*, Art. 1.

⁵³ *Ibid.*, Preamble, Recital 7.

and, vice-versa, of third countries' works in Europe.⁵⁴ Like the programmes that preceded it, the MEDIA Mundus programme also supported synergies between competitiveness and cultural diversity, on the understanding that increasing the competitiveness of the audiovisual industry would enable it to play its cultural and political roles in the world.⁵⁵ Cultural diversity in particular was associated with the promotion of intercultural dialogue, common values and increased consumer choice.⁵⁶

Competitiveness in the Light of Creative Europe

The first Creative Europe programme 2014–2020, which had a triple legal basis (Article 167(5) (culture), Article 166(4) (vocational training) and Article 173(3) (industry) of the TFEU), understood competitiveness in tandem with cultural diversity as complementary objectives to be achieved.⁵⁷ Like MEDIA 2007 and MEDIA Mundus, it focused on innovation and creativity as elements of competitiveness,⁵⁸ but did so in the context of a smart, sustainable and inclusive economy,⁵⁹ reflecting the underlying objectives of the Union's Europe 2020 agenda.⁶⁰ It accordingly understood high levels of employment, productivity and social cohesion as a motor for the growth and competitiveness of the CCSs,⁶¹ covering the audiovisual sector. The dominant perspective was the sector's capacity to operate transnationally and internationally, with access to finance and the excellence of audiovisual professionals viewed as key factors.⁶² Moreover, the 2014–2020 Creative Europe viewed competitiveness and cultural diversity as twin goals, underlining the dual nature of cultural activities, goods and services, which have cultural and economic value.

⁵⁴ Ibid., Arts 6 and 7.

⁵⁵ Ibid., Art. 1.

⁵⁶ Ibid., Arts 1 and 11.

⁵⁷ Regulation (EU) No 1295/2013 of the European Parliament and of the Council of 11 December 2013 establishing the Creative Europe Programme (2014 to 2020) and repealing Decisions No 1718/2006/EC, No 1855/2006/EC and No 1041/2009/EC [2013] OJ L 347/221. On the objectives of the programme and how these played out in the negotiations of Creative Europe, see Kandyła (2015).

⁵⁸ Ibid., Preamble, Recital 7.

⁵⁹ Ibid.

⁶⁰ European Commission, 'EUROPE 2020. A strategy for smart, sustainable and inclusive growth', COM/2010/2020, 3.3.2010.

⁶¹ Regulation (EU) No 1295/2013, Preamble, Recital 7.

⁶² Ibid., Recital 17 and Arts 4 and 9.

Safeguarding, developing and promoting Europe's cultural diversity thus went hand in hand with strengthening the competitiveness of its CCSs, in particular of the audiovisual sector.⁶³ At the same time, however, the programme also pointed out that cultural diversity might lead to market fragmentation, which could harm competitiveness.⁶⁴ It also noted that diversification along national and linguistic lines creates obstacles that impede the transnational circulation of audiovisual works and hinder the mobility of audiovisual players within and beyond the EU.⁶⁵ Competitiveness and cultural diversity were seen therefore as both complementary and conflictual concepts.

The second and last Creative Europe programme 2021–2027, which is presently in force and has a dual legal basis (Article 167(5) TFEU (culture) and Article 173(3) TFEU (industry)), understands the main elements of competitiveness to be education and culture, creativity, new knowledge, innovation, scalability and sustainability.⁶⁶ Again, it acknowledges, on the one hand, the intrinsic and artistic value of culture and, on the other, the economic value of the CCSs, asserting more broadly that “[c]ulture, arts, cultural heritage and cultural diversity are of great value to European society from a cultural, educational, democratic, environmental, social, human rights and economic point of view.”⁶⁷ However, unlike its predecessor, it does not identify any conflict between promoting competitiveness and cultural diversity. In addition, the programme recognises that the digital shift has intensified competition and that the EU therefore needs to step up its support, especially after the COVID-19 pandemic.⁶⁸ Therefore, unlike the first Creative Europe programme, the second also relates competitiveness to resilience. Significantly, in contrast to the Creative Europe programme 2014–2020, the Creative Europe programme 2021–2027 also acknowledges the mutually reinforcing potential of cultural diversity and competitiveness, for societal well-being and social cohesion as well as for fostering growth, creativity and innovation. For instance, within the social perspective, the programme has a keen focus on gender equality and on people with disabilities, on people belonging to

⁶³ *Ibid.*, Art. 3.

⁶⁴ *Ibid.*, Preamble, Recital 10.

⁶⁵ *Ibid.*, Preamble, Recital 11.

⁶⁶ Regulation 2021/818, Preamble, Recitals 1 and 7 and Art. 3(2).

⁶⁷ *Ibid.*, Preamble, Recital 1.

⁶⁸ *Ibid.*, Preamble, Recital 44.

minorities and socially marginalised in terms of active participation in both the creative process and audience development.⁶⁹

Competitiveness in the Light of Other EU Funding Programmes

In recent years, EU funding tools for the CCSs and thus also for the audiovisual sector have been complemented by an unprecedented use of funding tools under various EU policies to support culture and creativity. The *CulturEU Funding Guide*, the first of its kind, was issued in 2021 and presents EU funding opportunities for the CCSs for the period 2021-2027.⁷⁰ Published to help the CCSs “navigate the EU funding landscape,”⁷¹ the Guide naturally provides information on Creative Europe as the Union’s flagship cultural programme and is informative about a wide spectrum of other funding tools. Many of these *other* funding instruments have also been mobilised within the framework of the Union’s Media and Audiovisual Action Plan,⁷² which was launched in 2020 by the Commission to help the media and audiovisual sectors weather the COVID-19 crisis and become more competitive thereafter. The Recovery and Resilience Facility (RRF) features prominently among them.⁷³ Adopted on the basis of Article 175 TFEU (cohesion), the RRF seeks to facilitate recovery from the COVID-19 pandemic, improve Member States’ resilience, defined as their “ability to face economic, social and environmental shocks or persistent structural changes in a fair, sustainable and inclusive way,”⁷⁴ and offer support in addressing the digital and green transitions.

The COVID-19 pandemic highlighted the importance of resilience in the CCSs, which were not prepared to withstand the economic shocks brought about by the pandemic and to protect the employment and

⁶⁹ Ibid., Art. 3(5).

⁷⁰ European Commission, *The CulturEU Funding Guide*. EU funding opportunities for the cultural and creative sectors 2021-2027 <<https://culture.ec.europa.eu/funding/cultur-eu-funding-guide/booklet>> accessed 2 February 2024.

⁷¹ Ibid., at 6.

⁷² Communication from the European Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, *Europe’s Media in the Digital Decade: An Action Plan to Support Recovery and Transformation*, COM(2020) 784, 3.12.2020.

⁷³ Regulation (EU) 2021/241 of the European Parliament and of the Council of 12 February 2021 establishing the Recovery and Resilience Facility [2021] OJ L 57/17.

⁷⁴ Ibid., Art. 2. See also Manca et al. (2017).

security of employees (OECD, 2022). Culture and the CCSs are included in the RRF through specific initiatives in the National Recovery and Resilience Plans (NRRPs), which outline the reforms and investments to be implemented by the Member States through to the end of 2026, though these are not binding and there is no minimum or maximum budget for arts and culture in the NRRPs (Betzler et al., 2023). Culture Action Europe concluded in 2021 that the 2% threshold pre-established in the framework of the *#CulturalDealEU* campaign, backed by the European Parliament, had been met at an aggregated EU level, but not by each Member State individually (Culture Action Europe, 2021). According to 2024 data from the Recovery and Resilience Scoreboard,⁷⁵ only 4 out of the 18 NRRPs endorsed by the Council that included measures on culture contained measures specifically targeting the audiovisual sector. Member States envisaged support for film and audiovisual works, the promotion, modernisation, and digitalisation of the audiovisual sector, the integration of digital technologies into audiovisual production, improved access to finance, the internationalisation of the industry and its attractiveness to foreign investment, as well as the strengthening of the capacity of micro, small and medium-sized enterprises involved in film production.

CONCLUSION

The formulation of EU policies for the audiovisual sector and its EFI component has always been a challenge, as these policies must accommodate and balance distinct priorities. Economic and industrial concerns are intertwined with socio-political and cultural considerations, with all four vying for policy influence. Within the EU's intricate legal tapestry, the notion of competitiveness has been interrelated with the establishment and proper functioning of a single audiovisual market with fair competition. The EU has purposefully sought to bolster the competitiveness of the audiovisual sector—a *sine qua non* condition for a flourishing internal market and for coping with technological advances and changes introduced by digitalisation and platformisation. At the same time, taking action to correct imbalances deriving from the creation of a common broadcasting area through

⁷⁵ European Commission, 'Recovery and Resilience Scoreboard. Thematic Analysis. Cultural and Creative Industries', July 2024, <https://ec.europa.eu/economy_finance/recovery-and-resilience-scoreboard/assets/thematic_analysis/scoreboard_thematic_analysis_culture.pdf>.

mechanisms that sought structurally to promote content creation and distribution was combined with measures to safeguard important public interest objectives such as cultural diversity and pluralism. Significantly, boosting competitiveness was not seen as incompatible or in opposition to their pursuit, but rather as a complementary goal.

While approaching competitiveness in this way discloses a nuanced and multifaceted understanding of the concept, the degree of attention and effort devoted to its conceptualisation in the legislative acts reviewed for the establishment and proper functioning of the audiovisual single market is no match for the degree to which it is conceptualised in the funding acts under study. The latter reveal a clear evolution in their understanding of the concept of competitiveness and the combination of a broad range of perspectives on its operationalisation. First, creativity and innovation were taken on board as major factors of relevance early on, along with more common market-building considerations, which focused attention on Member States with a smaller audiovisual production capacity and/or limited geographical or linguistic area, on SMEs, and on the distribution potential of audiovisual works and their transnational circulation. Second, cooperation among countries and stakeholders was repeatedly advanced as an important factor in increasing competitiveness, as well as in bolstering skills, promoting excellence, reaching a high level of employment and strengthening the industry's access to capital markets and financing. Adopting an international competitiveness lens and enlarging audiences also received heightened attention.

More recently, competitiveness has become increasingly linked to the Union's efforts to address structural challenges posed by technological innovation, the digitalisation of the audiovisual industry and, ultimately, the COVID-19 pandemic. In this context, the concepts of recovery, resilience and sustainability have emerged as major determinants, complementing synergies with cultural diversity—a rather recurring element in the Union's understanding of the sector's competitiveness. The issue of gender equality has grown in relevance in relation to competitiveness in the latest funding programme, Creative Europe 2021–2027. The same is true for social inclusion and the participation of people with disabilities and minorities in the creative process and within audience development actions, while youth aspects were present in the MEDIA 2007 programme and increasingly so in each programme since. In its latest version, Creative Europe also supports actions that promote the strengthening of European

identity and values.⁷⁶ The role the European audiovisual sector plays in the emergence of European citizenship, making active citizenship a reality as well as ensuring respect for human dignity, promoting equality between men and women and combatting all forms of discrimination and exclusion, including racism and xenophobia, was recognised early on in the MEDIA 2007 programme.⁷⁷ This programme proudly affirmed that support in this regard was also intended to enhance competitiveness.⁷⁸

Overall, the analysis shows that competitiveness is a notably rich concept in itself, which goes well beyond developing a strong and vibrant economic base for the audiovisual sector. The Union's audiovisual governance has maintained a consistent focus on guaranteeing optimal market conditions for European audiovisual works, but not only. The analysis reveals a varied understanding of the concept of competitiveness which has been marked by complex and evolving synergies with other public interest objectives and other policy goals. It depicts competitiveness as a multi-layered concept, which is open to interpretation and can therefore be operationalised in multiple ways. The analysis also shows that, through the Union's legislative acts, the EU institutions have generally emphasised synergies and interaction. Legal instruments like Regulation 1295/2013, which established the Creative Europe programme 2014–2020, make it clear that the EU legislator is not unaware of potential conflicts between competitiveness and other Union objectives. Regulation 1295/2013 acknowledged that diversification along national and linguistic lines can create impediments to “the smooth transnational circulation of cultural and creative works” and result in market fragmentation which can “lead to geographical imbalances and, subsequently, to a limited choice for the consumer.”⁷⁹ This opens the door to potential conflicts when seeking to boost competitiveness on the one hand and maintain and enhance cultural (and linguistic) diversity on the other. For the most part, however, the study of the EU's legislative acts addressing the audiovisual sector indicate that the EU institutions have refrained from presenting competitiveness as an objective whose pursuit can come at a cost to other Union goals and values. Of course, as such conflicts remain possible, they should not be hidden from view but rather accounted for when they arise, with efforts

⁷⁶ See Regulation (EU) 2021/818, Recital 12 and Art. 5.1. (e).

⁷⁷ See Decision No 1718/2006/EC, Preamble, Recitals 1–2.

⁷⁸ *Ibid.*, Preamble, Recital 1.

⁷⁹ Regulation 1295/2013, Preamble, Recitals 10–11.

made to find remedies. The EU legislator should not shy away from bringing potential points of contention under the spotlight, but should be more outspoken and proactive in addressing ways to resolve them.

Quite importantly, the analysis also reveals that the EFI is generally addressed within policies that target the broader audiovisual sector. Direct interventions in this domain typically involve market-building measures from a single market perspective, such as legislative measures governing broadcasting and on-demand services, as well as funding instruments that support actions directed at the audiovisual sector—usually alongside other CCSs, as is presently the case with the Creative Europe programme. Indirect interventions also occur and are primarily associated with broader policy frameworks concerned for instance with sustainability, digitalisation or resilience—such as the RRF. Although they are not audiovisual-specific, they nonetheless have significant implications for the sector’s development.

These direct and indirect interventions also show that the EU’s instruments tend to *encompass* the EFI rather than being devoted *exclusively* to it, thereby setting the broader policy and regulatory environment within which the EFI operates. The analysis highlights how considerations of competitiveness have steadily featured in EU audiovisual governance, and brings to light the multiplicity of cultural, economic, social, and technological considerations that shape the competitiveness of the EFI as an integral part of this broader ecosystem. By gaining a clearer understanding of how competitiveness considerations are embedded within EU audiovisual governance, stakeholders—of different types and operating at different levels as analysed in this book—can more effectively identify opportunities and constraints facing the EFI in the EU policy context, pinpoint areas for strategic intervention to enhance its competitiveness, and develop their own policies and practices accordingly.

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CHAPTER 3

Young People and the European Film Industry: The Governance of “Near Misses”

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INTRODUCTION

This chapter aims to contribute to the debate about competitiveness of the European film industry (EFI) by taking stock of the ways in which European policy and legal frameworks have promoted—or missed—youth as an actor in shaping the future of the EFI. We selected policy documents and initiatives of relevance regarding young filmmakers in Europe, by identifying any provisions, which include concrete implications for working conditions, product distribution and promotion of filmmaking that focused on young creators in the industry.

In recent decades, the EFI has witnessed a significant transformation in production and distribution processes influenced by rapid technological advancements and shifting cultural landscapes. At the time of writing, the EU Artificial Intelligence (AI) Act (EC, 2023) has been welcomed as a milestone in regulating unwanted consequences of AI and *equally*

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criticised for not regulating enough intended and unintended consequences of AI. At the same time, the second youth festival on films with the use of AI is at its final stages in Barcelona (+RAIN, <https://www.upf.edu/es/web/rainfilmfest>) and professional cinematic co-production between humans and SORA (OpenAI, 2024; <https://openai.com/sora/#air-head>) sees the notable Air Head by shy kids, who describe themselves as “multifaceted artists.” Shy kids from Toronto started life as friends forming a band and working through film and arts projects in college, leading to their professional engagement with major studios and platforms.

To say that technological progress has profoundly impacted the EFI in the past 20 years is an understatement, especially while witnessing a tide of changes that might fully overhaul processes of filmmaking and the impact this can have on the human factor in these processes. Within this historical and technological context, the ways in which young people engage with films has undergone profound changes, as well. Audiovisual (AV) content making is now in the hands of everyone with access to a smartphone and social media platforms feed off from the content creation of millions of young users for their business models (GMI, 2024). The old paradigms of youth as cinema goers and consumers are no longer valid, as cinema going has decreased (Soto-Sanfiel et al., 2021) and been replaced by platform or other forms of digital, mobile consumption. Policy often comes to provide a framework to systems that have already been in place, in many ways ‘cementing’ change: the various AV and film promotion policies carved at the EU level have been studied extensively (Cabrera et al., 2021; Cappello, 2019; EC, 2013, 2014a, 2014b, 2023; Fontaine, 2024; Nikoltchev, 2014). Overall, their aim has been to support the EFI vis a vis global sources of market competition, in particular European film’s century old ‘nemesis’, Hollywood, but equally AV content from other economies of scale and production powerhouses, such as Bollywood, Nollywood or Japanese Anime. As filmmaking has been considered historically a process requiring expert skills, the focus on youth has been minimal, limited to the role of youth represented in films or youth as consumers. How misguided or profound this gap in knowledge—and provision—has been, is becoming arguably more visible in today’s realities, which cannot be ignored. As young people become content creators and often entrepreneurs in AV platform content, it is important to explore more closely their role as active agents vital for the competitiveness of the EFI.

But, what exactly do we mean with ‘competitiveness’? The concept of competitiveness is of considerable interest across various disciplines, including business, management, engineering and economics. ‘Competitiveness’ is defined by the World Economic Forum (2017, p. 11) as “the set of institutions, policies and factors that determine the level of productivity of an economy.” The term primarily concentrates on strategy, policies and innovation or technology of the industry’s competitiveness dimensions. Ray et al. (2023/1989) connect competitiveness with continuous technological developments and constant innovation that correspond to economic growth. Competitiveness requires variety in order to compare the alternatives (Ray et al., 2023/1989) and within this context creativity is considered a key element that promotes innovation (Gustafsson & Lazzaro, 2021; Ray et al., 2023/1989). Since the cultural and creative industries are a vital economic factor, their growth fosters national competitiveness and raises the challenge of viability and development (Klein et al., 2021). According to Porter, four characteristics of the domestic market influence global competitiveness: (1) factor conditions; (2) demand conditions; (3) related and supporting industries; and, finally (4) firm strategy, structure and rivalry (Porter, 1990, p. 78). ‘Factor conditions’ refer to the factors of production, including “labour, land, natural resources, capital, infrastructure” (Porter, 1990, p. 79). Specifically, the film industry is reinforced by financing from investors, labour by university graduates, as well as the proximity to important foreign markets (Howse & McLarney, 2006). The aspect of ‘Demand conditions’ addresses “the nature of home-market demand for the industry’s product or service” (Porter, 1990, p. 78). Drawing on Porter’s “Diamond of National Competitiveness,” Howse and McLarney (2006) found that the film industry experiences greater profitability when operating in densely populated areas, affluent consumers and competent distributors (Howse & McLarney, 2006). Also, competitiveness depends on ‘related and supporting industries’ that are internationally competitive, national provider sectors. For example, in the case of the film industry, the theatre industry employs partly similar professionals (Howse & McLarney, 2006). Finally, ‘firm strategy, structure and rivalry’ refer to “the conditions in the nation governing how companies are created, organised and managed, as well as the nature of domestic rivalry” (Porter, 1990, p. 78). Successful film industries are led by vertically integrated production companies with market-oriented approaches. They actively seek export opportunities and

prefer deregulation over government intervention (Howse & McLarney, 2006).

Parc and Messerlin (2020, p. 390) emphasise the importance of competitiveness in the film industry in relation to “possessing the capacity to produce attractive contents.” Supporting the audiovisual market can be achieved by enhancing the competitiveness of entrepreneurs through international production and additionally by fostering the domestic market through external productions (Orankiewicz, 2022, p.93). It is oriented to a transnational collaboration and co-productions by supporting companies to produce films intended for an expanded audience beyond European borders (Orankiewicz, 2022). At the same time, policies are being challenged regarding the extent to which they promote and support the Cultural and Creative Industries (CCIs) development “in particular at the entrepreneurial level” (Gustafsson & Lazzaro, 2021, p. 6).

Esposito and Tse (2012, p. 81) state that the enhancement of European competitiveness can be achieved by: (1) encouraging labour mobility; (2) making better use of the young workforce; (3) investing in education; and (4) boosting productivity. For attaining and enhancing competitiveness, a critical component is youth entrepreneurship that increases productivity, employment and innovation in the national market (Ćoćkalo et al., 2019, p. 522). Youth is “the bearer of the most promising part of human capital” (Mirgorodskaya et al., 2019, p. 2300). Young people’s creativity and entrepreneurial skills are essential for the development and progress of their community and country (Okafor & Makwe, 2022). Young people are involved by creating new products and evolving the existing ones in the market. Global competitiveness could be accomplished by educated and adequately proficient young people who can utilise technological developments (Okafor & Makwe, 2022). Since competitiveness is associated with young people, the following part examines young people as a policy concern and as object of knowledge within and about the film industry.

MISSING KNOWLEDGE ABOUT YOUNG PEOPLE AND THE FILM INDUSTRY

The European Commission (EC, 2014a) attributes to the film industry the mission of serving as a catalyst for innovation, thereby contributing to overall growth and employment. Audiovisual works, especially films,

underscore the shaping of European identities by reflecting European cultural diversity. Films, given their high production costs and cultural significance, face strong international competition and limited circulation beyond their country of origin. The fragmentation of the European audiovisual sector in national and regional markets contributes to this limited circulation. Acknowledging the difficulty for film producers to secure commercial backing, the Commission asserts the importance of state aid in sustaining European audiovisual production, through for example the MEDIA programme (EC, 2013). Film is entrusted with the task of shaping identities, projecting values and fostering integration to cultivate a shared and desired common identity and, much like news, serves as a potent political and cultural tool (Kolokytha & Sarikakis, 2018; EC, 2014c). Other media forms, such as news media and journalism, are often characterised by lower entry barriers by their non-fictional nature and documentary art style, such as online mobile web videos, the distribution on platforms that are tailored to young people's participation (Chau, 2010), and are initial points of contact between young people and film-making. In contrast and despite the availability of simpler technologies, traditional filmmaking, such as including stylistic mechanisms initiated via post production, typically demands significant technical knowledge and expertise. Although recent studies show a higher percentage of growing knowledge of production skills among young content producers on online platforms (Vogels et al., 2022), it is worth noting that overall knowledge about young people in relation to film-making is very limited.

Beyond treating youth as audiences, scholarly focus on youth has been scant, with interest in finding out about young people's preferences and lives as filmgoers and filmmakers picking up only in the past decade. At the beginning of the twenty-first century, scholarly interest was limited to largely ethnographic descriptions of small-scale initiatives. These were oriented to stimulate and cultivate film interest among and about youth, usually as projects of the margins or for community building, rather than of professional aspiration, largely funded by public authorities or non-governmental organisations. Buckingham and Harvey (2001) examined the production of two films made by young people aged 14 to 17 in London as part of the VideoCulture, an international research project operating in Germany, England, Hungary and the Czech Republic (Niesyto & Buckingham, 2001), funded by the Ministry of Education and the Arts, Baden Württemberg. Kaare, (2008) similarly explored a film-making initiative by the Church of Norway, focusing on the production of

short films by young people in the period 2005 to 2007. Twenty-nine participants, aged 16 to 18, shared their experiences as media producers in a digital storytelling project, including challenges and excitement about using audiovisual tools to share stories with other people. Blum-Ross (2012) studied the ‘Reelhood’ project, initiated by the Muslim Youth Helpline, an organisation dedicated to the support and development of young filmmakers by providing resources to learn to create films. The project engaged eight young Muslims aged 16 to 22 in London. The participants enhanced their technical skills in filmmaking, cultivated their creativity but also developed justice-oriented citizenship, which promotes active engagement with societal inequalities.

In the same year, the first major study of youth across Europe was conducted by the British Film Institute (BFI) under the European Film Literacy Survey from January to June 2012, evaluating 30 countries¹ (BFI, 2012). The survey revealed that robust national models of film education are found in countries typically involving collaboration among government education and culture agencies, non-governmental organisations (NGOs) and film and broadcast agencies. This collaboration was often underpinned by a national strategic plan. The purposes of film education in all these countries encompassed industrial considerations, such as cultivating adventurous audiences and a skilled workforce, but were fundamentally rooted in the belief that everyone is entitled to become ‘literate’ in the moving image.

Further studies focused on youth largely as audiences, such as The Screen(ing) Audiences project conducted from 2013 to 2017 in Belgium (Veenstra, 2017), explored the preferences of 1015 young people aged 16 to 18 as film audiences. It found that while audiences had access to films from any device, anywhere and at any time and were subsequently less reliant on traditional cinema and television, cinema attendance remained high. Between 2015–2017, 94% of participants had visited the cinema and almost half (49%) said they go to the cinema monthly. Furthermore, a related survey explored young people’s preferences as film audiences in London (BFI, 2018). Young audiences aged 15 to 24 outnumbered older

¹The 30 countries evaluated at the European Film Literacy Survey are: Austria, Belgium, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Italy, Latvia, Lithuania, Luxembourg, Malta, Norway, Poland, Portugal, Republic of Ireland, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, The Netherlands and the United Kingdom.

adults by a ratio of 3 to 1 in cinema attendance. Comparing young people's preferences across platforms, people aged 18 to 24, exhibited a preference for cinema attendance at 28%, compared to 21% for Video-on-Demand (VoD) and 8% for watching TV. In 2017, young people aged 18 to 34 constituted 49% of the audience for VoD, with Netflix serving as an example with 54.8% of its audience being within this age range. Through the BFI's initiatives, nearly 250,000 young people were exposed to the film clubs and over 890 young people aged 16 to 19 years old actively engaged in film production through the BFI Film Academy programme in the UK (BFI, 2018). In addition to the high participation of young people as film audiences, there is also a significant improvement in the quantity and quality of services and initiatives offered to young people to stimulate their interest and equip them with skills related to the film industry, such as film clubs initiative, BFI Film Academy programme, courses in secondary education about media/film/TV/moving image arts, courses about media and film in higher education (BFI, 2018).

A more recent study, involving 937 participants aged 13 to 19, regarding the habits of adolescents about cinema-going in eight different European countries (Croatia, England, France, Germany, Iceland, Italy, Romania and Spain) illustrated that young people mainly watched films on television at home and, alternatively, via computer (Soto-Sanfiel et al., 2021). Cinema attendance became mostly occasional, perceived as expensive, as a social activity with friends and to watch American cinema (Soto-Sanfiel et al., 2021; Veenstra, 2017). A post-COVID-19 survey showed that cinema attendance among young Flemish people aged 20 to 34 indicated no improvement in this steady decline (Tintel & Raats, 2022). Without replacing traditional cinema attendance, many young people consider VoD as an alternative option. VoD is gaining popularity among young audiences with, for example, Danish children and adolescents aged 8 to 17, being more inclined towards global VoD platforms, such as YouTube, Netflix and Disney+ compared to domestic ones (Jensen & Mitric, 2023).

Only recently has scholarly work shifted to examine young people as professionals in the filming industry. The 'European survey on the remuneration of audiovisual authors' (Willekens et al., 2019) conducted in 26 different countries in Europe gauged 3217 responses from professionals in the EFI, including directors, screenwriters and other audiovisual authors. Young professionals below 35 years represented only 13% to 17% of the participants in all three disciplines. The youngest age group among

directors proved to be the most productive. To measure this, the participants mentioned the number of projects they had worked on in each of the previous five years (from 2013 to 2017), involving cinema films, commercial work and TV productions without explicitly specifying if they had a contract. On the contrary, young screenwriters (31%) and other young audiovisual authors (14%) were the least productive, based on the number of the projects they have worked on, with the aforementioned percentage of them not working in any production in a median year (Willekens et al., 2019, p. 21). Additionally, the survey highlighted that young directors and screenwriters did not receive full remuneration for their activities. However, emerging authors had received an increasing income, although it was lower than that of established authors. Young professionals showed greater motivation compared to older people. The survey pointed out the young audiovisual authors were pleased with the creativity and personal development in their work, but they barely coped with finding projects and financial problems. McSheaffrey (2020) explored the aspirations of young people aged 16 to 18 related to entering and working in the film industry. The current state of research indicates a decreased scholarly enquiry in the field of young people as film contributors and professionals. Additionally, it highlights the decrease of young people's interest in cinema in recent years, which contradicts their attitude in previous years (Soto-Sanfiel et al., 2021). Currently, there is an inclination among young people to opt to watch films through VoD. To foster the competitiveness of EFI, it is important to recognise and respond to young people not only as audiences, but also to their challenges as creators and emerging professionals.

MISSING STRATEGIES FOR ENGAGING YOUTH

The promotion of the sector has been an important point on the EU's agenda in supporting the EFI through policies. Spanning from 1991 to 2013, the EU crafted its audiovisual policy through four iterations of the MEDIA programme, aimed at fostering the European market by facilitating the circulation of audiovisual works within the region. However, a strategic re-evaluation in 2014, prompted by the EC's proposal in 2011, led to a restructuring of institutional programmes and the establishment of new objectives. This consolidation culminated in the creation of Creative Europe with its operation from 2014 (European Parliament and the Council of 11 December 2013), which amalgamated initiatives like

MEDIA, MEDIA Mundus and Culture 2007–2013, thereby providing a cohesive framework. Aligned with the economic growth strategy outlined in Europe 2020, the early years of the Creative Europe programme (2014–2020) focused on fostering innovation and promoting cultural-linguistic diversity (EC, 2018). Amidst these transformations, significant changes in global film industries have unfolded over the past 20 years, driven primarily by economic globalisation and technological advancements: The international film sector has experienced noteworthy technological progress in production, distribution and exhibition. The proliferation of digital screens has surged and the integration of computer graphics and allied digital technologies has not only revolutionised the filmmaking process, but has also impacted the nature of film content and the patterns of film consumption. These changes have introduced economic and cultural challenges for policymakers, prompting a reconsideration of how film policy objectives are conceptualised, precisely delineated and executed within the expansive landscape of the industry.

Commencing in the early 2000s, a significant global shift occurred in the volume of cinematographic productions. The global film market industry has witnessed transformations with Bolly- and Nollywood rising as notable contributors of the cinematic landscape beyond Hollywood's still dominant supremacy. European countries, when considered collectively, maintained strong in the industry, holding the third position globally within the "Big 3" only overtaken by the USA in first place and Japan in second place in the global audiovisual industry (Fontaine, 2024). This trend intensified with the advent of smartphones and the proliferation of web videos, particularly mobile web videos (Jiménez et al., 2016). However, a nuanced analysis of changes in the cinematic landscape since 2007, focusing on video-film and its cognitive impact on spectators, reveals a distinct evolution, if not a revolution: the emergence and democratisation of 3D and 360° spherical images in video marked a significant development (Li, 2021).

In light of this, the EFI landscape faces new strategic choices. One such consideration involves distancing from 3D and 360° technologies due to the cumbersome ergonomics of 3D glasses. Instead, there is a growing inclination to integrate these technologies into video production, coupled with the adoption of less bulky viewing forms, such as autostereoscopic screens, lightweight and autonomous VR and AR headsets and immersive domes. While Asian media, particularly in China and South Korea, have embraced the latter solution, Europe appears to be hesitant. The

significance of the film industry in the EU is underscored in the ‘Communication from the Commission on State aid for films and other audiovisual works’ (EC, 2013), emphasising substantial support provided by the EU to the sector, with the aim of becoming a global leader in film production. The EU boasts high global TV viewing figures, pursuing other regions in film production and hosts over 3,000 online video-on-demand (VoD) services (Nikoltchev, 2014).

Shaping EFI policies is a multilevel process that begins at the main European institutions whose policies filter down to the national level, where member states adapt them to their respective specific cultural and legal context. From these policies, individual countries then develop strategic approaches that align with their unique goals and challenges in the film industry. Finally, these strategies materialise into concrete initiatives, reflecting the tangible efforts and actions taken by each state to foster a vibrant film sector.

The comprehensive influence of digital technology extends across the entire audiovisual system, reshaping aspects such as broadcasting, programming, production, delivery and payment systems (see Rossato Fernandes, Vlassis and Coenen in this volume). This transformation also leaves its imprint on cultural considerations, contributing to the heightened complexity of the European audiovisual landscape. The cinematic directives established in national film policies of EU member states are oriented towards fostering a harmonised industry wherein stakeholders collectively adhere to predetermined strategies aimed at advancing growth. Predominantly, these policies are designed to address concerns mostly related to economic expansion and employment generation, the safeguarding and promotion of national heritage and cultural assets, the stimulation of tourism and the fortification of national unity and integration. This wave of changes is particularly evident from the year 2012 to 2013, a period during which alterations in film policies are closely linked to technological changes. These advancements in film policy highlight significant developments across various member states of the EU based on different initiatives. Switzerland, the Czech Republic, Lithuania, Portugal, Romania and Slovakia have all implemented new legislative measures related to the cinema sector. These changes were primarily associated with the transformative shift towards digital cinema, leading to financial incentives and stimulation in the film industry (Nikoltchev, 2014).

In this context, we encounter two significant aspects: on one hand, there are crucial changes related to technological developments and on

the other hand, young people quickly embrace this transformation, evolving into content creators as YouTubers or TikTokers, without relying on specific policies. They precede the changes, thus influencing the spirit of policy formulation in this industry. However, what has happened in practice? Based on a series of reports published by 'IRIS Plus', it appears that until 2017, policy initiatives were significant, as seen for instance in the introduction of a programme aimed at promoting film diversity and digitising cinemas in Switzerland. Operators transitioning to digital between 2011 and 2012, offering diversified programmes, were eligible for financial support for up to five years, with a maximum benefit of up to 9 million Euros. This scheme provided financial incentives to encourage a variety of film offerings in cinemas. From 2018 onwards, we observe a growing concern about the lack of attention to young people in this field, particularly those under 20, who are significantly underrepresented, this is even more evident when focusing on French content or content about France (Cappello, 2019). Some initiatives provide perhaps an indication about the realisation that youth must be supported to guarantee the future of the industry. For instance, in Spain, Netflix has launched mentoring programmes for young female directors to shadow experienced directors throughout a full season of a series, providing them with the opportunity to direct an episode. This demonstrates a positive step in the landscape, with efforts being made to address the underrepresentation of young talent in the European audiovisual sector (Cappello, 2019). The following section discusses the developments of European audiovisual policy initiatives and their impact on young people in relation to the EFI.

YOUTH AND EU ENDEAVOURS FOR ENGAGEMENT IN MEDIA

The promotion of the film industry initially centred around national boundaries, with policies and support primarily coming from national film entities like Film Institutes and Public Broadcasters (Kolokytha & Sarikakis, 2018). However, the implementation of EU initiatives marked a significant shift, expanding the audiovisual media and film sector into a broader, international European context. This evolution has played a critical role in the industry's development, particularly in terms of job creation within the audiovisual market (Kolokytha & Sarikakis, 2018).

Because of this transformation, it has been instrumental in enhancing the sector's appeal, especially among young individuals aspiring to pursue careers in film and content production. The EU Youth Report 2015

(European Commission, 2016) highlights initiatives in European countries on national levels, all aimed at promoting young people's creativity through cultural engagement and increased opportunities for cultural participation. National programmes in countries such as Slovenia, Portugal and Poland support diverse cultural and artistic activities to enhance young people's cultural engagement. Initiatives such as Finland's 'Children and Youth Policy Programme' and Ireland's 'National Youth Arts Programme' focus on fostering creativity and cultural participation among youth. In 2012, the Flemish Region in Belgium also launched the 'Growing in Culture' initiative, which further emphasises the regional commitment to integrating young people into the cultural framework. In other European countries, cultural institutions, such as in the Netherlands, Lithuania and the UK focus on underprivileged young citizens and highlight the necessity for commitment to integrate young people into cultural activities, such as filmmaking. Efforts in Greece, for example, have encouraged young people's creativity and supported producers through short film production competition programmes organised by the Forum European Cultural Exchanges and the North Macedonian Museum of Contemporary Art (European Union, 2013). These national programmes underscore the overarching aim to enhance cultural literacy and foster European identity and traditions among the younger generation across Europe.

The 'European Film Club' founded by the European Film Academy in 2021 and funded by Creative Europe MEDIA is an international initiative that takes youth into the role of co-creators of the industry with its target group of young people between 12 and 19 (see Hiltunen and Lähdesmäki in this volume). This programme demonstrates the interest to include European youth into processes around European film, by introducing them to the EFI landscape, European film content and production process, as young people are the upcoming decision makers in the industry. The programme involves 38 partners from 30 countries including national film centres and institutes from various countries, such as film academies, high-profile film festivals, as well as film universities, national museums of cinema and film, film commissions and agencies and children's film and cultural organisations. This scheme is crucial for young people's engagement in cultural activities but still the commitment for their participation in political decision making is underserved.

Furthermore, another important initiative is the European Film Club (EFC), which can be traced back to a collective of teenagers who were previously engaged in the Young Audience Awards. These individuals

collaborated with members of the Academy team to brainstorm ideas for creating year-round opportunities for teenage involvement in film. The Youth Council is backed by the Consultation Group of 38 members from 23 countries and gathers every second month to guide the EFC. It introduces new ideas by annually electing members from a pool of young film enthusiasts, which ensures new perspectives in the discussions about European Films (European Film Club, [n.d.](#)). The members are 13 young film enthusiasts spanning the ages from 15 to 18 from which seven are aged 18, two aged 17, three aged 16 and one aged 15. Members originally come (one from each) from Romania, Sweden, Lithuania, Italy, Portugal, Poland and Austria, two from the United Kingdom, two from Bosnia and Herzegovina and two from Spain. Among these individuals, there are seven females and six male participants which makes the group gender equal. By promoting equal representation, the Youth Council and the Consultation Group of the EFC play a positive role in inclusiveness and promotion of a diverse environment of the industry. They are actively engaged in shaping and developing the programme to attract young participants into the club. The European Film Club is dedicated to establishing a network and platform spanning Europe, where young people can gather to view, discuss and exchange about European movies. This initiative exposes a varied collection of films, selected by young film enthusiasts, aiming to instil a deep-rooted appreciation for European cinema in future generations (European Film Club, [n.d.](#)). EU policy initiatives aimed at enhancing youth engagement in media and the cultural landscape often lack a focused approach towards involving young filmmakers specifically in policy discussions (Chaskin et al., [2018](#)).

In terms of overall digital audiovisual content creation, the bigger players are the United Kingdom, Germany, France, Italy and Spain. The overall digital audiovisual content creation market size in 2023 was valued at more than ten billion dollars and is expected to increase up to more than 40 billion dollars by 2030 (Kemp, [2023](#)). The growing trend of young people participating in content creation highlights the transformative role of smartphones and platforms, such as YouTube with more than 2.4 billion users globally and TikTok with more than 1.2 billion users (Dixon, [2023](#)). The largest age group is 25 to 34 years old considered as youth, with 522.5 million users, making up 20.7% of YouTube's total audience reached by YouTube's advertisements (Kemp, [2023](#)). In terms of barriers to entry for film content production, social media platforms, such as YouTube, show a significant decrease. Young people who are familiar with

YouTube content production from an early age find it easier to access producing filmic content, such as videos for YouTube (Johnson et al., 2023). There are similarities between the production of YouTube videos and films, as conventional film production goes through several phases: project development, pre-production, shooting, post-production and film exploitation on data carriers. These phases can also be found in the production of YouTube videos, although often in a much-simplified form (Filmpuls, 2022). As 74% of young people in between 16 and 30 years consume media content via YouTube while above 31 the percentage is 42% (Kemp, 2023), it can be argued that this type of video production with filmic elements is already established in society (Vogels et al., 2022).

Austria serves as an intriguing example of content creators within the European context, at an interesting intersection between larger markets due to language similarity with major markets like Germany and smaller, local media landscapes comparable to countries such as Portugal or Sweden. In Austria, as in other countries, various national and regional funding programmes are available to encourage young creators. For instance, the Austrian Film Institute and the Arts Section of the Federal Chancellery support innovative projects, including full-length films, documentaries, animations and experimental films, as well as young filmmakers and emerging creative content already stating newcomer film as a work with innovative character worthy of funding in 1987 (Austria, 1987).

Although there are initiatives that involve young people in the film industry as content creators, their voices and perspectives are not directly included in policy-making. In that case, policies regarding young people are mainly organised according to the country's federal structure, with national, regional and local authorities responsible for their implementation. The Federal Ministry of Family and Youth is the leading authority for Austrian youth policy at the national level, and all ministries organise youth policy measures considering the 'European Youth Goals' (Youth Goals, n.d.). However, the establishment of this National Working Group for Youth Dialogue and Youth Participation, represents significant effort to engage and to foster dialogue, participation and involvement in the political decision-making process, which appears to be limited in other sectors for young individuals. Although the country's strategy prioritises education and employment, participation and engagement, quality of life and cooperation as well as media and information, young people as content creators in the film industry are not explicitly mentioned as a target group in policy making. Additionally, at the European level, 'newcomer'

works in the film industry, usually produced by young and emerging/firstworks content creators, are classified as ‘difficult work’ (Cappello, 2019). An increasing number of young individuals are finding fulfilment and a creative outlet in filmmaking (Gilje & Groeng, 2015). However, in the context of national funding institutions, support for newcomers’ projects encounters a division in financial and educational support. The national ministry’s support aims to provide young artists with the necessary monetary resources for their film projects and thus strengthen them in their creative and professional development.

The policy frameworks of several EU member states, including Spain, Germany and Greece, reveal a consistent approach to supporting the film industry. These countries have established institutions and programmes aimed at bolstering the EFI, primarily through national-level governance measures (British Film Institute, 2018). Enhancing the participation of youth in cultural activities and filmmaking not only diversifies the media industry, but also ensures that their perspectives contribute to the ongoing discourse of ‘Europeanness’ and democratisation of future generations henceforth leading the industry (Kennelly, 2018; Veenstra et al., 2017; Soto-Sanfel et al., 2018). While these political initiatives acknowledge the vital role of young filmmakers in enhancing cultural diversity and driving innovation, there is a significant absence of provisions specifically targeting the engagement of the younger generation in future film policy formulation. Despite recognising the valuable contributions of young filmmakers, current policies fall short in adequately incorporating their perspectives and ideas into the development of future film policies.

CONCLUSION

The industry’s sustainability hinges on the involvement and empowerment of young people: they are not only tomorrow’s (and today’s) audiences, but also the future creative labour force and the future industry and policy leaders. Their political representation is necessary to ensure diversity and viability in the industry. The development of European policies in the filmmaking industry since 2000 has been a response to challenges presented by economic globalisation and rapid technological advancements. Notably, these policy transformations extend beyond economic considerations to highlight cultural aspects, with initiatives that aim to promote media literacy, education and training. The film industry itself has evolved in terms of production quality and has also embraced

alternative distribution channels, particularly via the internet, such as VoD platforms. As the industry grapples with the complexities introduced by digital technology, these policy adjustments served as the foundation for a harmonised and innovative European audiovisual landscape.

However, it is crucial to acknowledge that the role of young people in this evolving landscape is neither well understood nor adequately represented. A shadow of fragmentation and indecisiveness looms over European policies concerning the involvement of young people, who contribute significantly to various creative and industrial processes, beyond serving as mere audiences. The European legal framework only recently and in a fragmented and compartmentalised manner started taking notice of young people. In the history of EU AV and CCIs policies, youth is seen as audiences and consumers, missing the opportunity to recognise and nurture youth's potential as creators. Policy and scholarly history neglected their crucial role in the industry and nearly failed to integrate them as film industry's future leaders, something which has not only cultural, but also socio-political consequences. The emerging focus on media literacy, educational support and fostering creativity is aligned with the understanding that youth plays a pivotal role in shaping the future of the filmmaking industry. It constitutes both a necessity and a means for ensuring competitiveness of the European globally. Existing policies primarily highlight the significance of state aid in sustaining audiovisual production, but they fall short of addressing the unique perspectives and creative capacities that emerging talents bring to the table. Initiatives like the MEDIA programme, while fostering the competitiveness of the audiovisual sector, need to more actively create and provide opportunities for young filmmakers. It is crucial for European institutions to recognise this oversight and ensure that the next generation of professionals is actively involved in shaping the future landscape of European cinema. By investing in youth's education, developing their skills and creating space for their active participation, European policies are proactively nurturing the next generation of filmmakers. Despite the current lack of visibility in policies, it is essential to recognise the potential impact that young people can have in contributing to the ongoing success, cultural richness and competitiveness of the EFI.

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CHAPTER 4

Governing the European Film Industry by Prizes: The European Film Awards and the LUX European Audience Film Award

Tuuli Lähdesmäki and Kaisa Hiltunen

INTRODUCTION

Contemporary societies are driven by an attention economy building on the idea of attention as a valuable commodity. Businesses and content creators compete for the attention of their target audiences, which is limited due to the proliferation of information, media and digital content (Celis Bueno, 2016; Davenport & Beck, 2001). Prizes and awards are instruments indicating quality, novelty and innovation, but they are also essential components for drawing attention to products, services and their creators, and thus they have become an all-pervading phenomenon in contemporary societies. Today, most industries, if not all, hand out some kind of awards (Anand & Watson, 2004; Gemser et al., 2008) that are used for communication, image making and public relations.

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The prize proliferation is reflected in the film sector in Europe and beyond as film industry actors have widely adopted awards as an instrument of attracting attention to celebrate excellence and promote the industry. Today, almost all European countries have national film awards. Moreover, film prizes are awarded at the transregional level (such as the Nordic Council Film Prize), the European level (such as the European Film Awards) and the EU level (such as the LUX European Audience Film Award, previously called the LUX Film Prize) (see, e.g., Baschiera & Di Chiara, 2018; English, 2008; Stjernholm, 2016). An increasing number of local, national and international film events and festivals seek to attract visitors and gain visibility through awarding prizes in various categories (e.g., Iordanova, 2015; Strandgaard Pedersen & Mazza, 2011; Wong, 2011).

Cultural prizes, awards and other distinctions are tools for creating cultural meanings and governing social, political and economic implications that such meanings may have. Such prizes may underline, for instance, the European narrative of an awarded cultural product or event and include regulations for the awardee on what this narrative means and how it should be communicated. Cultural awards are thus a form of governance in which awarding bodies set the rules for and govern the (potential) recipients but also in which recipients (are expected to) self-govern their activities to receive the award and to turn the attention followed by it into a valuable commodity. It is not only industries that seek to govern businesses and content creators in this way. Indeed, various multilateral political institutions, such as the European Union (EU), seek to govern actors by prizes. Prizes can be, thus, seen as policy frameworks that shape decisions and guide actions, with their criteria, guidelines and procedures.

This chapter explores film awards as a form of governance by expanding the conceptual discussion of governance by prizes and prizes as brands with a closer study of two important cases of European film prizes, namely the European Film Awards and the LUX Film Prize, transformed into the LUX European Audience Film Award in 2020. Both awards are part of EU activities in the field of cinema whose aims range from increasing the economic competitiveness of the European film industry on European and global markets to strengthening the European community by drawing on shared values and a feeling of belonging to “Europe.” Thus, the following discussion considers the EU’s role in governing the European film industry through prizes and the challenges it faces in such attempts. Methodologically, the chapter is based on a desk study of previous research on cultural prizes and mapping grey literature and databases on film awards and their winners.

THE EU AS A PRIZE-GIVER

The European Commission has sought to increase the productivity of the European film industry by launching new strategies and policies, such as EU strategy on European film in the digital era. In it, the Commission notes how 63% of all films released in the EU in 2012 were European, but only 33% of admissions were to European films, while US productions accounted for 20% of releases and 65% of admissions (European Commission, 2014). No major changes in the productivity of European films have been noted since that strategy. In 2021, for instance, the market share by US productions in the EU was 58%, while European films dropped from the record high of 39% in 2020 to 27%, to levels before the Covid-19 pandemic (Cabrera Blázquez et al., 2023, p. 49).

Several scholars have explored the role of film in EU cultural policy and the policy instruments through which the EU impacts and regulates the sector (e.g., Herold, 2004, 2007, 2018; Irion & Valcke, 2015; Jäckel, 2005; Sarikakis, 2007; Stjernholm, 2016; Hammett-Jamart et al., 2018; see Psychogiopoulou et al. in this volume). Their studies commonly underline the EU's interest in European film both as an economic asset and as an identity political instrument. Such interests include various contradictory aims. As Herold (2004, p. 3) noted two decades ago: "the audiovisual policy at the EU level is characterised by a contradiction between the economic logic of market integration and the goal of preservation of cultural diversity." The EU seeks to make the European film industry more competitive against the Hollywood film industry and to increase the markets for European films both in Europe and beyond. Moreover, the EU seeks to foster cultural and linguistic diversity in Europe and European cultural identities in European film.

Bruno De Witte (2024) divides EU cultural policy instruments into three strands: cultural choices included in the regulation of market policies; culture-focused broad funding programmes based on competitive funding for bottom-up short-term cultural projects; and continuous emblematic cultural events based on a top-down policy that promotes the idea of Europe. Such emblematic cultural events include a cultural rationale aiming to highlight the European dimension of culture and to create and strengthen the idea of a European cultural area where cultural actors collaborate and cultural products are consumed transnationally (Lähdesmäki, 2024). Moreover, such emblematic events typically include more specific social goals, such as emphasising EU values, European

identity, belonging to Europe, the celebration of diversity, or promoting human rights.

The Creative Europe programme with its MEDIA strand is an example of the EU's culture-focused broad funding programmes and the EU's support for the European film industry operating through applied funding. Running the European Film Awards is one of many activities funded by the strand, whereas emblematic cultural events include the EU's cultural awards, prizes, or distinctions that the EU and its cultural partners co-run annually. The LUX European Audience Film Award is one of these prizes. Other EU cultural prizes focus on architecture (the EU Prize for Contemporary Architecture), literature (the EU Prize for Literature), cultural heritage (the European Heritage Awards) and music (the Music Moves Europe Talent Award). The EU has delegated the awarding processes of these cultural prizes to European expert networks and associations that are active in the fields in question, such as the European Film Academy. Since these prizes do not include or include only small financial rewards, their usability is in their expected brand value in attention economy (Lähdesmäki, 2024). For instance, the LUX European Audience Film Award does not include any direct grant, but the prize provides subtitles in the 24 official EU languages for the nominated films. The winning film receives further support in the form of adaptations for the visually and hearing impaired. Such investment in the accessibility of the films means an economic input from the EU aimed at helping the film to find a distributor in different European countries (Baschiera & Di Chiara, 2018; Stjernholm, 2016). As the exploration of these two awards later in this chapter shows, this investment has not necessarily led to major admission successes in Europe.

The brand logic functions, at its best, reciprocally. In the case of the EU's emblematic cultural events, the EU brands the participants and the awardees and the participants and awardees brand the EU (Lähdesmäki, 2024; see also Stjernholm, 2016). According to the criteria and guidelines of such events, the awarded cultural actors are expected to foster cultural diversity and shared cultural features in Europe as well as promote the visibility of the EU as a supporter of its local and regional cultural actors' activities and collaboration. At the same time, the cultural actors create (or the EU institutions use the emblematic cultural events to create) a more human and cultural image for the Union (Lähdesmäki, 2024).

GOVERNANCE BY PRIZES

The practice of awarding artistic and cultural creations with prizes has a long history dating back to antiquity (Storey, 2003; Wright, 2009). During the past decades, the practice has progressively increased, reflecting the capitalist logic of value formation in contemporary societies. English (2008, pp. 2–3) has described this logic as follows:

The rise of prizes over the past century, and especially their feverish proliferation in recent decades is widely seen as one of the more glaring symptoms of a consumer run rampant, a society that can conceive of artistic achievement only in terms of stardom and success, and that is fast replacing a rich and varied cultural world with a shallow and homogeneous McCulture based on the model of network TV.

Such a pessimistic view of the impact of cultural prizes certainly contradicts the aims of various prize-givers and the awarding criteria of diverse cultural prizes that seek to combat cultural homogenisation or standardisation by celebrating diversity, difference and uniqueness. Despite such aims, cultural prizes may implicitly guide the entrants to create cultural products that are up to date, topical and timely, so entries may resemble each other. For instance, Lähdesmäki (2014, pp. 493–494, see also Lähdesmäki et al., 2021, pp. 82–82) has noted that similar cultural contents are repeated at the EU-awarded European Capitals of Culture and that their ‘local’ cultural events may be difficult to distinguish.

The power of cultural prizes relies on the attention that they may gain among different audiences. Therefore, the act of prize-giving is often developed into an award ceremony, which may include a diverse programme for a large audience. In the film sector, award ceremonies and film festivals conjoin: the proliferation of film festivals has been accompanied by an increased number of film awards and vice versa. Both festivals and awards impact on the development of the film industry through competition. As Enverga and Tangco (2018, p. 827) note,

international film festivals are sites of competition, with movies being compared with one another, and winners being selected. At the same time, the events compete with one another to be the first to premier films by famous directors, to attract celebrities, and to draw media attention.

Similarly, Anand and Watson (2004, p. 60) have described the ways in which film awards and award ceremonies are seen as “tournament rituals” that shape the evolution of the sector. For the authors, “participation in tournament rituals is both a privilege endowed upon influential social actors in an organizational field and an instrument of status contests among them.” Film awards impact broadly on the film industry, including professionals, media, audiences and what is seen in the field as valuable, of high quality, or extraordinary.

Awarding cultural prizes and other distinctions can be seen as a form of cultural governance. Foret and Calligaro (2019) refer to such use of power as “governance by prizes,” distinguishing two modes of such governance based on whether the prize is awarded ex-post or ex-ante for the achievement. Ex-post prizes aim at honouring the achievement and thus arousing admiration and triggering emulation, while ex-ante prizes are based on a competition for monetary incentives or material resources that support the realisation of the proposed achievement. Foret and Calligaro (2019, p. 1136) name the first mode as “governing by praise” and the latter as “governing with a price.” In practice, though, these modes of governance overlap. Both modes draw on the following logic:

First, prizes are a resource of political domination to mark the centrality and authority of the prize-giver, the exemplarity of the recipient and the legitimacy of the cause and values that are honoured. Second, prizes work as a technique of government to create incentives, to mobilize civil society, private interests and individuals and to invite them to compliance. Third, prizes are public policy tools for the construction and the solving of social problems. (Foret & Calligaro, 2019, p. 1337)

In Foret and Calligaro’s (2019) terms, the EU’s Creative Europe MEDIA programme is a typical example of governing the film sector “with a price.” The programme builds on competition for monetary support to execute diverse audiovisual projects, including films. The European Film Awards and the LUX European Audience Film Award are examples of governing the film sector “by praise,” yet the governance logic of these two awards differs. The European Film Awards govern the sector by appealing primarily to the quality of films determined by European film professionals, while the governance in the LUX Film Prize and later the LUX European Audience Film Award draws on specific European contents set by the European Parliament. Both awards include a social agenda.

The regulations of the European Film Awards note that “the selected and nominated films should reflect diversity which, in the sense of the European Film Academy, means to include a wide range of filmmakers, regardless of their gender, socio-economic background, religion, race, age, sexuality or disability” (European Film Academy, 2023). The LUX European Audience Film Award has a similar underpinning, but extends the social agenda to the content: winners are expected to “successfully portray equality, diversity and inclusion through the film’s topics and characters” and “raise awareness about current social and political issues” (European Parliament, 2023a).

Moreover, both awards include a European agenda: in their awarding criteria they seek to govern the film sector by defining in terms of geography what a European film means. In them, the notion of a European film draws on a list of the EU and selected non-EU countries where the eligible films must be produced or co-produced or the professionals involved in the making of the film have to originate from or be affiliated with (European Film Academy, 2023; see Hiltunen and Lähdesmäki in this volume). Again, the LUX European Audience Film Award extends its European agenda to the content: winners are expected to “illustrate (...) topics at the heart of European debate,” “promot[e] and encourag[e] public debate on European daily life and on Europe’s future” (European Parliament, 2023b) and “engage audiences in debates about Europe” (European Parliament, 2023a).

The eligibility criteria for both awards utilise the recognition and attention that films have received in previous competitions. Entries to the LUX European Audience Film Award must “have received an award, or notable attention, at a major festival” (European Parliament, 2023a), while entries to the European Film Award must “have been awarded at major festivals” or “been selected at least once for competition plus two other sections by at least three major festivals” (European Film Academy, 2023, p. 3). The European Film Academy’s regulations list 34 such festivals in the category of feature films. These criteria underline how film prizes are connected (to be eligible for this award, a film must have won other awards) and how prizes and festivals conjoin in the attention economy of the film industry.

Following Foret and Calligaro’s (2019) arguments, both the European Film Awards and the LUX European Audience Film Award can be perceived as instruments that mark the centrality and authority of the prize-giver, the European Film Academy with its selected film professionals and the EU, or more precisely, the European Parliament established the LUX

Film Prize in 2007 as a symbol of the Parliament's commitment to culture. The European Film Academy board and a group of experts appointed by the board pre-select films for the Academy members to vote on. For the LUX Film Prize, Members of the European Parliament (MEPs) voted for their favourite of the films pre-selected by a panel of film professionals endorsed annually by the Parliament's Committee on Culture and Education. The LUX Film Prize was turned into the LUX European Audience Film Award in 2020 when the European Film Academy started to run the prize jointly with the Parliament, in partnership with the European Commission and Europa Cinemas. The change reflects the EU's more general aim of supporting democratic culture and citizen participation in society. After the change, the panel has selected the nominees from the pool of films submitted to the European Film Awards (though additional films can be proposed) and the winners are chosen through a combination of a public vote via a rating platform and rating by MEPs, with each group being weighted at 50%. These two film awards are thus closely connected. The winners of the LUX European Audience Film Award are announced in a ceremony at the European Parliament. The award is linked to the European film festival scene: in 2023, for instance, the nominees were unveiled during the Venice International Film Festival with the presence of MEPs (European Parliament, 2023a). Since both are awarded to films that have been previously recognised with other prizes, these two awards underline the exemplarity of their recipients.

"Governance by prize" is typically about "governance at a distance"—since the prizes motivate cultural actors to try to achieve them, or even compete for them and thus make the actors transform and adapt their actions, responding better to the awarding criteria and prize-givers' expectations (Foret & Calligaro, 2019; see also Vos, 2019). The European Film Awards and the LUX European Audience Film Award do not (yet) have a leading role in film's attention economy—at least compared to more established awards, such as the Oscars or Golden Globes in the US or Palmes d'Or in Europe. However, they can be perceived as instruments of governing the European film sector at a distance through their regulations, tournament rituals and publicity for the winners. Both awards are also a means of attempting to govern European publics at a distance, since they seek to mobilise European people to watch the nominated and awarded films and impact on audiences' notions of Europe and its current social and political issues. The awards' European and social agendas underline what kind of films the EU and the European Film Academy appreciate

and want to celebrate. In practice, the public is governed at a distance through the nominated and awarded films and through the European Film Academy's and European Parliament's websites and social media channels promoting the films. Since a limited number of people follow these websites and channels, this promotion—and thus governance—can be considered rather ineffective.

PRIZES AS BRANDS

Cultural prizes rarely include a major monetary reward but build on another kind of economic logic. Cultural prizes are brands that are wanted to be received since receiving a prize—a brand—is beneficial for their recipients. Brands are based on a promise of added value: they can bring about widespread recognition and visibility that are beneficial since such added value can be turned into economic value (Lähdesmäki, 2024). The added value for both nominees and winners in the European Film Awards and the LUX European Audience Film Award is created through promotional activities before, during and after the award ceremony. The nomination may increase the films' international audience and media coverage, particularly if the film producers and marketing agents utilise the awarding process efficiently.

Scholars have explored the functioning of cultural prizes by utilising Bourdieu's notion of capital (Baschiera & Di Chiara, 2018; English, 2008, 2014; Lähdesmäki, 2024; Stjernholm, 2016). Prizes enable “the transformation from one kind of capital to another, as they constitute an institutional network where transactions between cultural, symbolic and economic capital are negotiated” (Baschiera & Di Chiara 2018, p. 239). Moreover, prizes enable awardees to gain social capital, that is, a strengthened social position and status in a social network that can be turned into economic capital (Lähdesmäki, 2024). English (2008) refers to the logic of awarding cultural prizes as the “economics of cultural prestige” in which cultural, symbolic and social dimensions of capital are interwoven and cannot be understood without the money economy. Publicity enables the transformation of capital and is, hence, a prerequisite for the functioning of any ex-post prizes. It is also pivotal in the awarding process since it displays the prize-givers' authority at work (Foret & Calligaro, 2019).

The value of the European Film Awards and the LUX European Audience Film Award as cultural brands draws on their European dimension and the broad European selection process, including film

professionals, high-profile European organisations and, in the case of LUX and the European Young Audience Awards as a subcategory of the European Film Awards (see Hiltunen and Lähdesmäki in this volume), European audiences. The utility of the European dimension in cultural brands, though, depends on the image and credibility of the prize-giver—here, the European Film Academy and the European Parliament. Research on cultural prizes suggests slightly contradictory results on the utility of the European dimension. On the one hand, the research on several prizes and cultural distinctions and awarded by the EU shows the ways in which the awarded cultural actors see the value of such European-level brands as higher and more significant than the brands at the national, regional, or local levels. European-level brands, such as the European Capital of Culture and European Heritage Label, are perceived as evidence of European-wide importance, quality and exclusivity and as scaling up the meanings and importance of awarded cultural actors, events and sites (Lähdesmäki et al., 2020; Lähdesmäki et al., 2021; Lähdesmäki, 2024). On the other hand, scholars have noted that the EU’s “logic of symbolic production (...) remains secondary to member states in the definition of hierarchies of honours and values” (Foret & Calligaro, 2019, p. 1337).

This contradiction may build on the differences in the brand value of the European-level and particularly EU-related, awards. Some of them are (still) rather modest brands, while others are more established, broadly recognised, competed for and utilised for diverse cultural, social and economic purposes. Moreover, the connection of the prize to the EU may not only create positive associations since “the political agenda of the institution offering the prize can be perceived to be at odds with the aesthetic values normally associated with film art,” as Baschiera and Di Chiara (2018, p. 239) note about the LUX Film Prize (see also Jäckel, 2015). One reason for this view may be that the EU as a political organisation is considered as lacking professional legitimacy within the film sector.

Even though the EU has not yet managed to create broadly recognised film-related brands to support the competitiveness of the European film industry, many European film festivals and their prize categories function in this way. The best-known festivals, such as Cannes, Berlin, or Venice, are brands that can be used to market and create value for films shown and awarded in them. The strongest film brands build on awarding quality defined by film professionals and they may also impact audiences’ notions of what European film is. Screenings at the best-known European film festivals and winning their awards, such as the *Palme d’Or* in Cannes, have

a huge impact on individual films, their production teams and the European film sector and its image more broadly (see Ramos Arenas in this volume). As González Zarandona (2016, pp. 787–788) puts it: “A film selected for Cannes is never the same film after it is shown in the festival, as it becomes part of Cannes and its filmic heritage.”

THE AWARD WINNERS

The European Film Awards and the LUX European Audience Film Award are conjoined through more than EU-based funding and organisational links. The same films appear among the nominees and winners of both awards and are thus jointly promoted. Moreover, the European Commission uses the links between the awards and EU funding to communicate its engagement in the European film sector. For instance, the Commission’s press release on the European Film Awards in 2022 noted how the EU had supported 16 films that held in total 30 nominations, including nominations in the European Film Awards’ the most recognised subcategory, European Film (European Commission, 2022). In 2022, four EU-funded films or people behind them received the European Film Award in its different subcategories. These films included *Triangle of Sadness*, by Ruben Östlund, winning the award in four categories, including the European Film. The film had won the Palme d’Or in Cannes earlier in the same year. The nominees for the LUX European Audience Film Award are revealed during the European Film Awards ceremony, as was the case in 2023 with *Triangle of Sadness*. Due to the nomination requirement that films have received previous awards, the European Film Awards and the LUX European Audience Film Award participate in the formation of an interdependent network of film prizes.

Table 4.1 indicates both similarities and differences between the two awards. Two of the films, *Ida* and *Toni Erdmann*, have been awarded with both. All 21 winners are co-productions between European, in some cases also non-European, countries and ten of them include multilingual dialogue in at least two European languages. Films for which France, Italy and Poland are the main production countries have won these awards twice. In total 25 countries have participated in the production of the awarded films, most often France (in 12 films) and Germany (in seven films). The films included in total 19 languages, of which the most common were English (in seven films). The production teams in the winning films cover a vast geographical range of European countries. The five

Table 4.1 Winners of the European Film Awards in the subcategory of European Film (EF) and the LUX Film Prize / LUX European Audience Film Award (LUX) in 2012–2022

<i>Award & Year</i>	<i>Film & Director</i>	<i>Production country</i>	<i>Language spoken in the film</i>	<i>Budget</i>	<i>Total number of awards (non-European awards in brackets)</i>	<i>Total admission in EU countries & UK</i>	<i>Total admission in non-EU markets</i>
EF 2012	<i>Amour</i> by Michael Haneke	France, Germany, Austria	French	\$8.9m	84(39), incl. Oscar	2,418,221	2,609,266
EF 2013	<i>The Great Beauty</i> by Paolo Sorrentino	Italy, France	Italian	€9.2m	60(9), incl. Oscar	2,610,698	2,686,274
EF 2014	<i>Ida</i> by Paweł Pawlikowski	Poland, Denmark	Polish, French, Latin	\$2.6m	68(30), incl. Oscar	1,388,021	1,431,575
EF 2015	<i>Youth</i> by Paolo Sorrentino	Italy, France, the UK, Switzerland	English	€12.8m	24(7)	2,746,111	2,831,842
EF 2016	<i>Toni Erdmann</i> by Maren Ade	Germany, Austria, Switzerland	German, English, Romanian	€3.0m	59(26)	2,135, 223	2,227,835
EF 2017	<i>The Square</i> by Ruben Östlund	Sweden, Germany, France, Denmark	Danish, English	\$5.5m	33(16)	1,637,806	1,729,000
EF 2018	<i>Cold War</i> by Paweł Pawlikowski	Poland, the UK, France	Polish, French	€4.3m	49(13)	2,442,065	2,517,415

EF 2019	<i>The Favourite</i> by Yorgos Lanthimos	The UK, United States, Ireland	English	\$15.0m	186(142), incl. Oscar	5,356,023	5,501,380
EF 2020	<i>Another Round</i> by Thomas Vinterberg	Denmark, Sweden, Netherlands	Danish	€4.5m \$5.2m	60(22), incl. Oscar	2,790,671	2,939,686
EF 2021	<i>Titanium</i> by Julia Ducournau	France, Belgium	French	\$4.6m	29(22)	527,857	546,137
EF 2022	<i>Triangle of Sadness</i> by Ruben Östlund	Sweden, Germany, France, the UK, Mexico, Turkey, Greece United States, Denmark, Switzerland	English	\$15.6m	24(9)	1,925,764	2,048,370
LUX 2012	<i>Shun Li and the Poet</i> by Andrea Segre	Italy, France	Italian, Mandarin	-	20(2)	266,955	266,955
LUX 2013	<i>The Broken Circle Breakdown</i> by Felix Van Groeningen	Belgium, Netherlands	Dutch	-	38(16)	1,020,491	1,045,222
LUX 2014	<i>Ida</i> by Paweł Pawlikowski	Poland, Denmark	Polish, French, Latin	\$2.6m	68(30), incl. Oscar	1,388,021	1,431,575
LUX 2015	<i>Mustang</i> by Deniz Gamze Ergüven	France, Germany, Turkey	Turkish	\$1.3m	46(13)	1,329,014	1,389,176

(continued)

Table 4.1 (continued)

Award & Year	Film & Director	Production country	Language spoken in the film	Budget	Total number of awards (non-European awards in brackets)	Total admission in EU countries & UK	Total admission in Europe incl. non-EU markets
LUX 2016	<i>Toni Erdmann</i> by Maren Ade	Germany, Austria, Switzerland	German, English, Romanian	€3.0m \$3.2m	59(26)	2,135,223	2,227,835
LUX 2017	<i>Sami Blood</i> by Amanda Kernell	Norway, Denmark, Sweden	Swedish, South Sami	-	25(9)	296,056	364,468
LUX 2018	<i>Woman at War</i> by Benedikt Erlingsson	Iceland, France, Ukraine	Icelandic, Spanish, English, Ukrainian	\$2.9m	29(9)	797,089	855,125
LUX 2019	<i>God Exists, Her Name Is Petrunija</i> by Teona Strugar Mitevska	North Macedonia, Slovenia, Belgium, France, Croatia	Macedonian	€1.4m \$1.6m	8(1)	108,637	120,036
LUX 2021	<i>Collective</i> by Alexander Nanau	Romania, Luxembourg, Germany	Romanian	-	37(16)	36,058	36,782
LUX 2022	<i>Quo Vadis, Aida?</i> by Jasmila Žbanić	Bosnia and Herzegovina, Romania, Austria, Netherlands, France, Poland, Germany, Norway, Turkey	Bosnian, English, Serbian, Dutch	€3.5–4.0m	40(8)	171,281	193,019

Sources: for languages, Wikipedia (2023); for budgets, Internet Movie Database (2023); for the number of film awards, Internet Movie Database (15 March 2024); and for admissions, Lumiere database (2023). In 2020 the LUX was not awarded due to Covid-19 pandemic.

biggest film production countries in Europe—Italy, France, Germany, Spain and the UK—are involved as main or co-producing countries in 16 films. Twelve films were co-produced in an Eastern European, Balkan or Nordic country. Two of the films are co-productions of only these countries.

The European Film Academy winners had on average higher production budgets than the LUX winners.¹ Between 2012 and 2022, the mean budget for the European Film Awards was €7.8m with the median budget amounting to €5.1m, while for the LUX award, the mean production costs were €2.25–2.3m with the median budget of €2.5m. The production costs of LUX winners are in line with the general budgets for European fiction films. In 2019 and 2020, for instance, the median budget of a European theatrical fiction film amounted to €2.1m, based on a sample of 651 films from 25 countries in 2019 (Kanzler, 2021, p. 2) and 482 films from 27 countries in 2020 (Cabrera Blázquez et al., 2023, p. 16). The same studies note how the median production budgets are approximately €0.6–1m higher in European countries with large markets, such as France, Germany, Italy, Poland and the UK, compared to small ones in which the budget is commonly €1m less than the median. Compared to the European Film winners, the LUX winners include more films from countries with small film industries and markets. They also include more films co-produced by Eastern European and Balkan countries. The budgets of these films are modest compared to US films: A typical budget of a Hollywood theatre-released film in 2022 was \$30–50m (Statista Research Department, 2023).

European Film winners also have higher admission rates—and thus larger audiences—than LUX winners, which is logical given that the European Film Academy's nominees are well-established films. The European Film winners yielded a total of 26.0m admissions in the EU and the UK (mean = 2.4m admissions per film) and 1.1m in Europe outside the EU (mean = 99,120 admissions per film). The LUX winners gathered 7.5m admissions (mean = 0.8m per film) in the EU and the UK and 0.4m in Europe outside the EU (mean = 38,137 admissions per film). *The Favourite*, an English-language film starring several globally well-known actors, co-produced by the UK, US and Ireland, received the highest

¹ Accurate comparisons of film budgets are challenging because information on them is not necessarily available, or different sources may report different amounts due to, among other things, different ways of calculating a film's total budget.

admissions. Admission numbers were rather modest for some films, such as in the Romanian-language film *Collective*, co-produced by Romania, Luxembourg and Germany. Three European Film winners and one LUX winner also received an Oscar, but this did not make any significant difference to their theatre admissions in Europe compared to the other winning films.

The winners of the European Film Award and the LUX European Audience Film Award underline the tradition of European art house film. The winning films have been recognised by film critics and awarded in European festivals where film professionals and film enthusiasts have praised their quality. Awarded films attract more awards: Simonton (2004) notes that awarding film professionals are conspicuously like-minded, success in the most appreciated film awards indicates success in specialised awards granted by guilds and societies and awards correlate positively with film ratings.

CONCLUSIONS: FILM PRIZES AND COMPETITIVENESS

This chapter emphasise how awarding prizes constitutes a common practice in today's attention economy, which is characterised by competition for visibility, publicity and recognition. The growing number of film awards is hosted by local, regional, national and transnational actors, including multilateral political institutions, such as the EU. Film awards are a tool to impact on the sector by generating interest in nominees and award winners—films, the professionals who work on them and industry behind them—but also to bring the prize-givers to the spotlight and promote their goals and value discourses. The EU supports the European film industry by financing audiovisual projects and awarding films with a specific European and social agenda. Yet, such governance by prizes has limits. Film awards are brands and the brands have power only when they are strong enough—that is, when they are broadly recognised, competed for and appreciated among film professionals and large audiences. The European Film Awards and the LUX European Audience Film Award cannot yet beat the better-known brands in the film sector.

Even though European films are rarely transnational box office successes, they receive numerous awards. Many of the winners of the European Film and the LUX European Audience Film Award had received dozens of other film awards. Several scholars have shown how established film awards impact on film production and competitiveness of film industry

more broadly by functioning as a sign of quality that helps film audiences and other actors in the value system to consume particular films (Anand & Watson, 2004; Deuchert et al., 2005; Gemser et al., 2008). Gemser et al. (2008) examined why some awards are more effective signals of quality than others; they found that expert-selected awards were more effective than consumer- or peer-selected awards. This finding supports the argument why the LUX European Audience Film Award, selected by MEPs and audiences, is less effective in branding the awarded films within the film sector than expert-selected awards.

European art house films commonly win these two awards, which thus continue to strengthen a particular image of European cinema by underlining its auteur brand of artistic quality and socially engaging stories. This art house image could be better used to increase competitiveness of the European film industry not only in terms of audience size, but also in terms of brand. If competitiveness includes building a strong brand signalling quality, uniqueness, film art and social responsibility, film policymakers should not only concentrate on how well European films sell. Commercial success might even weaken this brand and thus decrease its value within the film sector.

The European Film Awards and the LUX European Audience Film Award are instruments that could be utilised more effectively to brand European cinema. Film perpetually navigates between the two poles of artistic expression and commercial considerations. A cinematic work aspiring to high artistic standards must concurrently be economically viable, due to the costs inherent in film production. Film policymaking is a balancing act of promoting the competitiveness of the film industry, supporting the artistic quality of European films and enhancing policymakers' social agenda.

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A Panoptic View of the Common European Data Space for Cultural Heritage Through the Lens of the European Film Industry

Pelin Turan and Caterina Sganga

INTRODUCTION

The European Union (EU) is witnessing an epoch marked by the launch of its new flagship initiative: the Common European Data Space (CEDS). Inaugurated in 2018 (Communication COM(2018) 232 final), the CEDS initiative impacts not only the Union's digital policies and strategy but also those of culture and cultural heritage. In this regard, in 2021, the EU introduced the Common European Data Space for Cultural Heritage (Cultural Heritage Data Space, CHDS), which has significant implications on the EU cultural strategy as a result of integrating the Union's ongoing endeavours to digitise European cultural heritage into the CEDS initiative (Recommendation (EU) 2021/1970).

The CEDS initiative catalyses the EU's transition into an information society and a data-agile economy by unleashing the potential of the extensive volume of data collected and stored within the Union while

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optimising its free flow and efficient cross-border use (Communication COM(2018) 232 final; Communication COM(2020) 66 final). Driven by these goals, the CEDS is envisaged as a “seamless digital area” (Communication COM(2018) 232 final), or a smoothly operating single market for data, which would facilitate cross-border and cross-sectoral transfers of various types of data through a trustworthy and secure digital infrastructure (Communication COM(2018) 232 final). Guided by these overarching aims and objectives, the CEDS initiative is supported by legislative endeavours to incentivise, accelerate and legitimise data transfers within a complex network consisting of not only Government-to-Government (G2G) but also Business-to-Government (B2G) and Business-to-Business (B2B) cooperation and data flows (Communication COM(2018) 232 final). These efforts would eventually accelerate the competitiveness of the EU in the global digital market by facilitating the access to and reuse of a rich pool of data to develop new data-driven products and services in various sectors.

The CEDS initiative is an assemblage of fourteen domain- and sector-specific and interoperable data spaces, bringing together multi-layered data structures and governance frameworks to organise and enable data transfers (Staff Working Document SWD(2024) 21 final). These data spaces are dedicated to sectors ranking at the top of the European agenda, including the cultural heritage domain, which was elevated to a priority for the EU upon becoming the lynchpin of the New European Agenda for Culture adopted in the 2018 European Year of Cultural Heritage (Communication COM(2018) 267 final).

The New European Agenda for Culture praises the role that cultural heritage plays in harnessing a common European identity “in all its diversity” (Communication COM(2017) 673 final). Furthermore, it emphasises the economic potential of cultural heritage by referring to its capacity to “create spill-over effects in other economic sectors,” such as media and tourism (Communication COM(2018) 267 final). It also encourages the circulation of European artworks across Europe (see: Communication COM(2018) 267 final) and the promotion of the digitisation, online accessibility, cross-sectoral reuse of cultural heritage assets by a multitude of stakeholders for commercial and non-commercial purposes as well as for digital preservation for the future generations. In this regard, embedding cultural heritage into the CEDS initiative presents a fundamental step towards fulfilling the Agenda’s goals.

Despite the shared aims and objectives, the EU Cultural Agenda and the CHDS have originated and evolved in different timelines without being interlinked. However, the CHDS may offer new opportunities for a wide spectrum of public and private stakeholders addressed within the EU Cultural Agenda, including the European Film Industry (EFI), especially if considered in tandem with the Union's policies and agenda to digitise, digitally disseminate and preserve the European film heritage. Acknowledging the value of cinematography as a means to "record" and transmit the common European history, imagery and communal memory, the EU has actively worked towards the digitisation of analogue cinematographic content and preservation of European film heritage since the early 2000s, with the aim of enabling the dissemination of and public engagement with European films through the traditional and digital distribution channels, including but not limited to theatrical distribution, television broadcasts, online streaming platforms (Resolution 2002/C 162/02, Recommendation 2006/585/EC, Recommendation 2011/711/EU). In this regard, the CHDS would foster the EFI's efforts to open up to the global digital market by increasing European cinema's accessibility and discoverability while facilitating the reuse of digital content available at CHDS in producing new cinematographic content, goods and services.

Still, deciphering the European Commission's (EC) vision and the future trajectories of the CHDS vis-à-vis the EU policymakers' endeavours to enhance the accessibility and discoverability of European cinematographic works and heritage is far from being an easy task for two major reasons. On the one hand, European cinematographic content has been subjected to various and disparate Union policies (e.g. cultural, digital, copyright, media policies). These existing policy documents adopt and use unharmonious terminology, which makes it difficult to understand whether and to what extent the Union plans to populate the CHDS with cinematographic works. On the other hand, including cinematographic works in the CHDS engenders multifaceted challenges, stemming primarily from the EU copyright regime, which could hamper the digitisation and dissemination of not only copyright-protected films but also the ones in the public domain.

In order to shed light on this complex framework, this chapter first offers an overview of the CHDS and its relevance to the greater EU policies and strategies on the digital transformation of European cultural heritage, which led to the creation of a domain-specific data space dedicated to cultural heritage. Then, it provides an insight into the interplay of the

CHDS with European film heritage, again drawing upon the EU policies on European cinematography and the Union's expectations from the CHDS on the digitisation, accessibility and preservation of European film heritage—all of which underpin the overarching aims and objectives of the CHDS. Against this background, the chapter analyses the operationalisation of the CHDS and the obstacles imposed by EU copyright law. It provides recommendations to facilitate the operationalisation of the CHDS, which would contribute to the competitiveness of the EFI in the global digital market by enhancing its accessibility, discoverability and reuse in the digital realm.

Before delving into the analysis, a methodological note is necessary. “Cultural heritage assets” is a generic term encompassing tangible and intangible, natural, born-digital and digitalised cultural content, regardless of their “copyright-protected” or “public domain” status. However, the analysis herein has a narrower scope as it covers mainly analogue and digitalised cultural heritage assets and cinematographic works, with the exclusion of born-digital cultural heritage assets and cinematographic content which does not constitute a cinematographic work (e.g. archival materials such as film posters, postcards, ticket samples). The limitation of the scope of this chapter as such can be justified also by the EC's strategy to build the CHDS upon the legacy of the *i2010: Digital Libraries* initiative, which was the first comprehensive Union effort to mass-digitise cultural content to create an online and publicly-accessible repository of cultural assets, eventually led to the EU's renowned digital library: *Europeana*.

The chapter concludes by acknowledging the complexity of the CHDS endeavour and advocates for the adoption of EU-wide sectoral data-sharing policies and legislation, particularly to establish the stakeholder network in which data transfers will take place and to foster B2B and B2G data flows. This would not only crystallise the distinguishing features of the CHDS compared to the *i2010: Digital Libraries* and *Europeana* initiatives but would also help to align the progress of the CHDS with the overall aims and objectives of the CEDS. Such an intervention would also allow the identification of the legal enablers and disablers of the digitisation of cultural heritage assets and the transfers of data through the stakeholder network, laying the groundwork for the definition of the legislative reforms needed in other areas (primarily copyright law) to support the operationalisation of CHDS.

A “DEEP FOCUS” ON THE COMMON EUROPEAN DATA SPACE FOR CULTURAL HERITAGE

The CHDS is a relatively new phenomenon which is presented, in line with the overarching ambitions of the CEDS initiative, as an endeavour of the EC “to accelerate the digital transformation of Europe’s cultural sector and foster the creation and reuse of digital cultural heritage content” (Staff Working Document SWD(2024) 21 final). Its origins trace back to the adoption of the Lisbon Strategy by the EC in 2000, which marked a milestone in the digital transformation of the EU and stressed the need for structural and legal reforms to catch up with the challenges and needs triggered by the digital revolution (on the development of EU audiovisual policy in general, see Psychogiopoulou, Samaras and Comerma in this volume).

Devised to implement the Lisbon strategy, the *eEurope* Action Plan of 2002 provided the EU with a robust roadmap to operationalise the transition of the Union into a competitive and dynamic knowledge-based and data-driven economy (Communication COM(2002) 263 final). It consolidated the EU ambitions and strategies for the advancement of digitisation and highlighted the importance of digitally-skilled State bodies, public institutions—including cultural heritage institutions (CHIs) and educational institutions—and citizens (Communication COM(2001) 140 final) for the EU to become a full-functioning information society and a global market leader. In this sense, the Plan included cultural policies within the realm of EU digital policies, paving the way for a wave of digitalisation of European cultural heritage assets.

Starting from the early 2000s, the EC has published several policy documents emphasising the need to digitise existing cultural heritage materials and to preserve born-digital and digitalised cultural heritage assets, while also safeguarding their digital accessibility and availability by the public at large. CHIs and galleries, libraries, archives and museums (GLAMs), as custodial and memory institutions, have been acknowledged to have a central role in operationalising this goal, enabling the engagement of the public with cultural heritage, thereby reinforcing the cultural and linguistic diversity of Europe (Resolution 2002/C 162/02, Recommendation 2006/585/EC, Recommendation 2011/711/EU). To achieve this goal, the EC has called the Member States to introduce mechanisms that would support and facilitate the operations of CHIs and GLAM (Resolution 2002/C 162/02; Recommendation 2006/585/EC,

Recommendation 2011/711/EU), while also highlighting the economic benefits of large-scale digitisation projects as the digitalised content could be reused, for instance, by creative industries to produce new commercial products and services, thus generating economic returns while consolidating the EU position in the global cultural and creative *milieu* (Communication COM(2005) 465 final, Recommendation 2011/711/EU).

Informed by these principles, EU institutions focused on two parallel goals underlying the digitisation of cultural heritage: preservation and access/dissemination. Regarding the first objective, the Council Resolution of 25 June 2002 flagged the conditions that jeopardise the sustainability and use of born-digital and digitalised cultural heritage assets (Resolution 2002/C 162/02). It highlighted how they are often fixated on *fragile* media, which may easily deteriorate or become inaccessible since the technology used to digitise them may soon become obsolete and make the support unreadable by state-of-the-art hardware or software. To tackle these problems, the Resolution emphasised the role of CHIs and GLAMs in the cataloguing and conservation of cultural heritage and hinted at the potential of this institutional network to disseminate cultural content, calling for the development of harmonised policies and efforts at the EU and national levels to support their activities (Resolution 2002/C 162/02).

As to the second objective, which explores the opportunities provided by digitisation for enhancing the accessibility and dissemination of cultural heritage content, the Commission Communication of 10 September 2005 launched a flagship initiative, namely the *i2010: Digital Libraries* project. Devised to establish an online library that would make Europe's cultural and scientific heritage available to the masses by digital means (Communication COM(2005) 465 final), the project embraced an all-encompassing definition of digital libraries as "organised collections of digital content made available to the public" (Communication COM(2005) 465 final), including both born-digital and digital copies of analogue content.

The *i2010* initiative can be seen as the precursor of the CHDS, as its operationalisation was built upon three pillars: online accessibility, digitisation of analogue content and preservation and archiving of born-digital and digitised content (Communication COM(2005) 465 final). This initiative not only consolidated the need for large-scale digitalisation activities and digital information repositories, but it also set out the first robust *digital* roadmap to digitise, make available online and digitally preserve a

multitude of cultural assets forming the European collective memory, such as “printed materials, photographs, artefacts, archival documents and audiovisual materials” (Communication COM(2005) 465 final, Recommendation 2006/585/EC, Recommendation 2011/711/EU).

Following up on the *i2010* initiative, the Recommendation of 24 August 2006 advocated for the creation of “a common multilingual access point” (Recommendation 2006/585/EC, Conclusions 2008/C 319/07) to facilitate the public’s access to and engagement with the digital cultural heritage assets held by CHIs and GLAMs across Europe. This paved the way for the launch of Europe’s most renowned digital library: *Europeana*.

Launched in 2008 (Conclusions 2008/C 319/07, Recommendation 2011/711/EU), *Europeana* is an internet platform allowing a broad spectrum of stakeholders—such as end-users, EU Member States, CHIs, GLAM—to access cultural assets held by CHIs and GLAM across Europe and to facilitate their reuse (Conclusions 2016/C 212/06). As clarified in the Commission Recommendation of 27 October 2011, *Europeana* is designed to accommodate multi-purpose and cross-sectoral reuse of digitalised cultural heritage assets, including the uses for commercial and non-commercial purposes (Recommendation 2011/711/EU), while respecting and complying with intellectual property rights (IPRs).

The CHDS builds upon the legacy of the *Europeana* initiative and advances its approach to large-scale digitisation activities by taking into account multi-stakeholder perspectives. It promises a single federated digital infrastructure that will cumulatively satisfy the disparate needs and expectations of different stakeholder groups that have so far been targeted by the EU cultural and digital policies. From an institutional perspective, the CHDS aspires to scale up the activities of CHIs and GLAMs in the Single Market (Recommendation (EU) 2021/1970). From the perspective of the cultural and creative sectors, it is designed to serve as a platform fostering the availability and reuse of digital cultural heritage assets both for commercial and non-commercial purposes, thus spurring creativity while generating value for the European economy and society (Recommendation (EU) 2021/1970). By taking into account the public’s interest in engagement with and right to participate in cultural life, the CHDS is also intended to provide end-users with “high-quality content and efficient, trusted and easy-to-use access” to European cultural heritage assets (Recommendation (EU) 2021/1970).

The intricacies of these ambitions, however, require the cooperation of multiple players, from CHIs and GLAMs to data aggregators and cultural

and technical experts, to deploy the CHDS (Recommendation (EU) 2021/1970). The Commission entrusts *Europeana* with the tasks of bolstering inter-institutional cooperation and interoperability endeavours, monitoring and facilitating the deployment of the CHDS, hosting the CHDS on its online platform and populating it with its digital collections (Conclusions 2016/C 212/06, Recommendation (EU) 2021/1970).

Regardless of the incontestable expertise and experience of *Europeana*, the role it is entrusted with for the operationalisation of the CHDS confirm that the CHDS's success depends on national CHIs and GLAMs since the "digital access point of Europe" shall be realised by channelling the data compiled or generated by them to the *Europeana* platform (Conclusions 2008/C 319/07, Recommendation 2011/711/EU, Communication COM(2008) 513 final). In addition, *Europeana*'s task gets further complicated by the fact that, as of 2021, only 45% of its digitised (52 million) material could be reused, mainly for non-commercial purposes (Recommendation (EU) 2021/1970), with only 2.47% of reusable content constituting audiovisual content (Recommendation (EU) 2021/1970). While the percentage of cinematographic works therein has not been calculated, the place they hold for the EU cultural and digital agenda and the digitisation, online availability and digital preservation of European film heritage makes this scarcity a relevant issue and a potential obstacle to the success of the CHDS and the fulfilment of its goals. Despite the ostensible simplicity of the problem, the under-digitisation of audiovisual content is deeply rooted in the Union's digital policies targeting culture and cultural heritage and it stems from the interplay of the EU copyright framework with mass-digitisation of in-copyright and out-of-copyright elements of cultural heritage.

A "RACKING FOCUS" ON THE COMMON EUROPEAN DATA SPACE FOR CULTURAL HERITAGE

The CHDS's potential to boost the digitisation of European cinematographic works and heritage as well as to facilitate the accessibility and the cross-border and cross-sectoral reuse (for instance, by video game industry) are evident. Nevertheless, the attainment of these objectives relies on the existence of well-justified policies and legislative capacity to digitise and disseminate cultural content, especially cinematographic works, by digital means. In this regard, Recommendation (EU) 2021/1970, which

launched the CHDS, is accompanied by an annex that reports quantitative data on the total sum of digital records held by each Member State as of 2021, along with short-term and long-term indicative targets to be achieved in the digitisation of cultural assets by 2025 and 2030. The data do not distinguish cinematographic works from other content; neither is there concrete evidence to clarify whether the EU or *Europeana* have ever aimed to make cinematographic works available either on the *Europeana* platform or the CHDS. However, the Union's policies and agenda concerning the European film heritage point exactly in this direction, thus requiring the examination of the feasibility of populating CHDS with cinematographic works.

From a policy perspective, cinematography has an intricate relationship with the EU's cultural and digital strategies due to its dualistic character. The Council Resolution of 5 November 1993 placed EU film-making on a pedestal due to its importance for the European cultural heritage, recognising the influence of cinema on other forms of artistic expression and creativity (Resolution 94/C 85/02) and encouraged the dissemination of European film heritage in various fora within and beyond the borders of the EU (Resolution 94/C 85/02). This first sign of commitment to the preservation and accessibility of European film heritage can be found in the Council Resolution of 26 June 2000 (Resolution 2000/C 193/01), which defined cinematographic content as "a unique record of the life, customs, history and geography of Europe" (Resolution 2000/C 193/01), thus acknowledging cinema as a catalyser to consolidate a common European identity. Due to its *recording* capacity, the Resolution defined cinematographic works as an effective tool to transmit this abundance of socio-historical and cultural information to future generations (Resolution 2000/C 193/01), to exhibit and document European values and to safeguard their diversity (Resolution 2000/C 193/01; see also Communication COM(2001) 534, Resolution 2003/C 295/03, Recommendation 2005/865/CE, Communication COM(2018) 267 final).

With the gradual evolution of the EU digital strategy and especially with the aforementioned initiatives to create online repositories and the CEDS, the Union's interest and focus on cinema have been interwoven into the Union's digitisation and digital preservation efforts for two interrelated reasons. First, the Council Resolution of 26 June 2000 addressed a problem haunting the EFI and the sustainability of the European film heritage: the "threat of irreversible material degeneration"

of the analogue mediums on which the European cinematographic works have been fixated (Resolution 2000/C 193/01; also see Resolution 2003/C 295/03, Recommendation 2005/865/CE). Referring to a survey conducted in 2002 with ten major broadcasting organisations operating in Europe, the Commission Communication of 30 September 2005 revealed that their archives host “1 million hours of film; 1,6 million hours of video recordings and 2 million hours of sound recordings” (Communication COM(2005) 465 final), vastly fixated on tangible mediums that are vulnerable to the external conditions in which they are preserved. The same survey also unveiled that “[e]very year Europe’s audiovisual archives lose 10,000s of hours of the oldest part of their collections” due to decaying or obsolete media carrying such content (Communication COM(2005) 465 final).

The destruction of cultural heritage due to the deterioration of the supporting media is, in fact, a common problem that permeates analogue European cultural heritage assets in general, justifying the EU agenda to digitalise European cultural heritage assets. This problem is further exacerbated by others specific to the EFI. The Council Resolution of 26 June 2000 drew attention to the fact that the European film archives, despite holding “a vast legacy of films” comprising approximately “a million short-feature and full-length feature films representative of every genre” (Resolution 2000/C 193/01), have largely remained in the periphery of the digital restoration and digital preservation agenda of Member States and national CHIs and GLAMs. This is mainly because only a small portion of the revenues generated from the commercial use of film is allocated for preservation activities, whereas a large portion of the European film heritage at risk is left to their faith due to budgetary restrictions (Resolution 2000/C 193/01).

These challenges—exemplary rather than exhaustive—have been taken into account by the EC while laying the foundations for the CHDS. The administrative and technical issues were tackled within the existing (yet quite limited) EU documents dedicated to the operationalisation of the CHDS. For instance, the Commission Recommendation of 10 November 2021 suggests prioritising the digitisation and digital preservation of cultural heritage at risk and the cultural heritage categories subjected to a lower level of digitisation (Recommendation (EU) 2021/1970), which might give impetus to the digitisation of analogue cinematographic content by Member States. Likewise, the Recommendation takes into account

the financial burdens of large-scale and high-quality digitalisation practices and highlights the need to involve private entities with technological capacities, facilities and expertise in the field (Recommendation (EU) 2021/1970). However, there are still legal and policy challenges standing between the current state of the art and the fulfilment of the CHDS goals, which have remained unsolved.

For instance, the Commission Recommendation of 27 October 2011 encourages Member States to digitise “all public domain masterpieces,” without necessarily providing any indication as to what should be understood as a “masterpiece” and the possible legal implications of this activity (Recommendation 2011/711/EU). To further complicate the framework, cinematographic works have been the subject of a multitude of EU actions, including the preservation of cultural heritage, the revitalisation of EFI and the modernisation of the EU copyright law. Having approached the matter from different angles and through the lens of different disciplines (e.g. copyright and media), the definitions of cinematographic works by EU texts are heterogeneous, not streamlined and possibly differing from those adopted by the international copyright instruments. Furthermore, the limited knowledge or hesitation of CHIs and GLAM, especially in taking up the opportunities provided by exceptions and limitations to copyright and related rights (E&Ls) or licensing schemes, introduce additional barriers to the management of IPRs over cultural assets that are integral to the common cultural heritage of Europe.

The Commission Recommendation of 10 November 2021 admits that the obstacles experienced by CHIs and GLAMs in the previous decades continue to cast a shadow on the advanced forms of digitisation, online accessibility, digital preservation and, especially, the reuse of digital reproductions of cultural heritage assets by various stakeholders, including creative industries and, particularly, the EFI (Recommendation (EU) 2021/1970). In this sense, the “datafication” of cinematographic works, while justifying the digitisation of European cinematographic assets in large quantities, also raises new challenges to how cinematographic works interact with copyright law vis-à-vis the EU’s roadmap for the deployment of the CHDS.

THE “CROSS-CUT” OF THE EUROPEAN FILM HERITAGE, DIGITISATION AND DIGITAL PRESERVATION OF EUROPEAN FILM HERITAGE AND EUROPEAN COPYRIGHT LAW

The successful operationalisation of the CHDS prerequisites the concretisation of the interlinks of disparate Union policies (e.g. digital, cultural, copyright policies) which underpin the justification of the CHDS at different stages and to different extents. This shall be followed by a mapping of the legal instruments to legitimise the actions (e.g. digitisation, digital preservation and online dissemination of copyright-protected and public domain works) to achieve the goals ingrained in these policies. Nevertheless, the CHDS merges the EU cultural and digital policies without necessarily bringing clarity to their interaction with the ongoing efforts in the Union’s digital agenda on the EFI while overlooking the shared copyright-related aspects and complexities of both initiatives. Considering that the Union copyright policies and legislative framework are the keys to populating the CHDS with digital(ised) cultural content, the EC’s ambitions to digitise all the public domain works, along with the EU policies to digitalise and digitally preserve analogue cinematographic content, urgently call for an assessment of the feasibility of this effort from a copyright-related perspective.

As emphasised within the Lisbon strategy, the digital transformation of the EU had required structural and legislative reforms to adjust the EU regulatory framework to the challenges raised by the digital era. The EU copyright *acquis* was modernised by a series of interventions until 2019 to equip Member States with harmonised legal tools that could facilitate large-scale digitisation projects, such as *Europeana* (Staff Working Document SEC(2008) 2372, Communication COM(2015) 626 final). Still, the limited success achieved in the digitisation of audiovisual content and in populating the *Europeana* platform with digitalised audiovisual content deserves an assessment of the challenges imposed by the current EU copyright regime on the digitisation, online availability and digital preservation of copyright-protected and public-domain elements of the European film heritage. Whereas the challenges stemming from the EU copyright regime are many, the focus of this chapter will be limited to the problems directly hampering the success of the CHDS.

The preliminary issue to be tackled herein is the conceptual opacity caused by the unharmonious use of key terms and definitions in different EU texts and policy documents—and often in a manner that is contrary to

established copyright norms and standards. The EU copyright *acquis* does not define “work,” let alone “cinematographic work.” However, Article 2 of the Berne Convention for the Protection of Literary and Artistic Works provides some guidance on the matter, for it refers to cinematographic works as a sub-category of literary and artistic works:

The expression “literary and artistic works” shall include every production in the literary, scientific and artistic domain, whatever may be the mode or form of its expression, such as (...) *cinematographic works to which are assimilated works expressed by a process analogous to cinematography* (...).¹

Compared to this, the Recommendation of 16 November 2005, which enlists a number of policy actions on the EFI, offers a narrower definition of cinematographic works, as “moving-image material of any length, in particular, cinematographic fiction, cartoons and documentaries, *which is intended to be shown in cinemas*”² (Recommendation 2005/865/CE). The inconsistency of this approach with established norms and standards of international copyright law and thus with EU copyright law, which is bound by them, is more than evident.

Copyright law approaches its subject matter (e.g. literary or artistic works) by associating the work with its author/creator rather than its *target audience*. However, by framing cinematographic work as a means of mass entertainment, the Recommendation excludes a significant portion of original works acknowledged as copyright-protected cinematographic works (e.g. amateur authorial works disseminated at festivals or other events, films produced for video-on-demand or DVD industry) from the globally accepted description of the term.

Further complications arise from the use of audiovisual content, cinematographic work and film without a clear-cut precision of what distinguishes one from another (Poll, 2002). For instance, Directive 2006/115/EC acknowledges “film” as an umbrella category that encompasses cinematographic works by defining it as “a cinematographic or audiovisual work or moving images, whether or not accompanied by sound.” Directive 93/83/EEC and Directive 2006/116/EC, however, use cinematographic works and audiovisual works interchangeably, while Directive 2010/13/EU refers to cinematographic works, audiovisual works and

¹ Emphasis added.

² Emphasis added.

films as separate categories of cultural content, without clarifying their relation to one another.

This conceptual patchwork reached its peak with Directive (EU) 2019/790 (CDSMD), which in Article 14, requires EU Member States to take the necessary measures to protect the public domain by preventing the revival of legal protection over the copies of reproduced “works of visual art”—a term that has never been defined nor previously used by the EU legislator. The provision stipulates that “when the term of protection of a work of visual art has expired, any material resulting from an act of reproduction of that work is not subject to copyright or related rights unless the material resulting from that act of reproduction is original in the sense that it is the author’s own intellectual creation” (Directive (EU) 2019/790). The act of reproduction as such shall be understood in broad terms, as suggested by a multitude of EU Directives (see: Directive 96/9/EC, Directive 2001/29/EC, Directive 2009/24/EC; also see: Rosati, 2021). Therefore, the reproduction as such can go beyond a faithful reproduction of the public domain material and it can be “direct or indirect, temporary or permanent, by any means and in any form (e.g. two- or three-dimensional reproductions, analogue or digital reproductions), in whole or in part” (Rosati, 2021). It is clear that understanding whether cinematographic work falls under this category is of key importance for the CHDS, for it may allow the digitisation of European film heritage that has fallen into the public domain and the population of the data space with such digital reproductions.

Whereas a broad interpretation of “works of visual art” would encompass cinematographic works (Benabou et al., 2020; Rosati, 2021), the applicability of this provision to digital reproductions of cinematographic works fixated on analogue media and on which the copyright term has expired remains uncertain. In practice, the digitisation of cinematographic content is often accompanied by other actions such as, for instance, restoration, colourisation (also of originally black and white films), adjustment of the saturation and tinting, dubbing, insertion of subtitles and synchronisation of the audio and subtitles (see: Bader, 1986; Op den Kamp, 2018). It is not clear, in light of the current EU copyright *acquis*, whether these acts, which modify the original public domain work, lead to the creation of a derivative work eligible for copyright protection—a circumstance which may render inapplicable Article 14 CDSMD and its national implementations.

The uncertainties surrounding the application of the provision are not the only obstacle to the smooth digitisation and communication to the public of cinematographic works on which the copyright protection term has expired. In fact, copyright law is not the only legal regime that governs the public domain. The presence of property rights, as well as the self-regulatory measures of CHIs and GLAMs—a problem labelled in the literature as the “theoretical and physical public domain” dichotomy—leaves the cataloguing, restoration, digitisation, communication to the public and preservation of public domain materials to the discretion of the holders of rights over the physical support on which the public domain work is fixated (Op den Kamp, 2018). As a consequence, the selection and prioritisation of the materials to be digitised and preserved also remain in the hands of those institutions.

In any case, the term of protection envisioned for cinematographic works significantly reduces the number of films that have fallen into the public domain. Since these are productions that are often joint-authored, the term of legal protection, which lasts during the lifetime of the author and 70 years post-mortem, should be calculated from the death of the last surviving person who was involved in the creation of the work either as the principal director, the author of the screenplay, the author of the dialogue or the composer of music specifically created for use in the work (Directive 2006/116/EC). This makes the vast majority of the European film heritage works still under copyright.

The EC noted on several occasions that a significant portion of digital content is held by private actors, such as publishers and broadcasters (Resolution 2002/C 162/02). These assets are protected by IPRs, the enforcement of which limits the room of manoeuvre left to the digital policies and agenda of the EU and the Member States (Recommendation 2006/585/EC, Recommendation 2011/711/EU). Compliance with IPRs in this case is mainly possible by concluding licence agreements with copyright owners of cinematographic works, which is not only a complex task due to the joint authorship but also an economically inefficient method, especially for large-scale digitisation projects. E&Ls to copyright and related rights fall short of facilitating these endeavours. Indeed, the two main provisions envisaged for the preservation of CH, namely Article 5(2)(c) InfoSoc Directive and Article 6 CDSMD, permit the reproduction of copyright-protected works but remain silent on the communication or making available to the public of such copies. In addition, a comparative analysis of the national transposition of these provisions depicts a highly

fragmented framework, with some Member States limiting the number of copies that can be made or disseminated (Sganga et al., 2023). This lack of harmonisation not only hinders the international cooperation of CHIs and GLAMs but also adversely influences the conditions under which digitalised copyrighted works can be utilised to populate the CHDS.

The European Commission requires Member States “to take full advantage of the opportunities offered by the current copyright framework” (Recommendation (EU) 2021/1970) to digitise and digitally disseminate cultural heritage. While national legislators still enjoy some flexibility in devising national solutions to the problem, the deployment of a CHDS that could seamlessly operate without borders across the Union cannot rely on Member States’ efforts only. In this sense, the current EU copyright *acquis* still needs further intervention at the Union level to respond to the EFI’s needs concerning the deployment of the CHDS, especially given that the CHDS would fulfil its promises only if it facilitates B2G and B2B data transfers not only for non-commercial but also for commercial purposes as well.

CONCLUSION

The launch of the CEDS is a novel way to expedite the economy and competitive power of the EU in a digitised market. In this context, the CHDS offers authentic means to accelerate the accessibility and discoverability—hence the export—of European cultural content, including the European cinematographic content, by digital means. Nevertheless, the operationalisation of this endeavour, thus the promotion of the EFI via the CHDS, requires a careful consideration of multiple policy agendas of the EU along with the legislative framework to transform these goals into a market reality.

Despite the market-related ambitions of the CEDS in general, the CHDS, at the time being, gives the impression of comprising an advanced version of the *Europeana* platform, not only because it is supervised by the *Europeana* Consortium and builds on the *Europeana* infrastructure but also because it dwells upon the Union’s cultural policies and copyright reforms dating back to the early 2000s to facilitate mass-digitisation projects concerning in-copyright and out-of-copyright cultural assets. Due to the same reason, the operationalisation of the CHDS is doomed by the same policy and legal questions the *i2010* initiative and *Europeana* had to tackle. Yet, per contra the *i2010* initiative and *Europeana*, the CHDS, also

in line with the overarching aims and objectives of the CEDS in general, requires the involvement of multiple players with different market goals, including those of commercial ones.

Nevertheless, the CHDS still misses a detailed implementing act that could identify and ensure consistency in the efforts of Member States, CHIs, GLAM and other key players. This does not come as a surprise as the CHDS, particularly if compared to other domain- and sector-specific data spaces, is still in its infancy. Whereas the EC has emphasised that “[t]here is no one-size-fits-all structure for common European data spaces; each space is organised by participants taking into account the unique characteristics of the specific sector domain” (Staff Working Document SWD(2024) 21 final), and such a supranational intervention is needed to contour the CHDS and its ultimate goals. Aside from these structural points, the interplay of the CHDS with the European film heritage requires deep fine-tuning. In this regard, the EC shall clarify the relevance of Union policies aimed at digitising and digitally preserving European film heritage with the CHDS.

For the population of the CHDS with cinematographic works, at least two major issues must be resolved. First, the very few EU policy documents elaborating on the CHDS do not clarify the features that distinguish the CHDS from *Europeana* and make it not only a tool to sustain the latter, but an initiative that has a much greater value for the EU cultural and creative sectors. This is a prerequisite to the successful deployment of the CHDS, as *Europeana* was pivotal to ensuring online availability and accessibility of certain cultural heritage assets, but the CHDS is now called to a much wider endeavour, that is to facilitate multi-purpose and cross-sectoral uses of digital cultural heritage assets.

Second, the CHDS is expected to bring together various public and private institutions as well as end-users and to ensure seamless data transfers through this network. To be implemented, this goal requires a robust roadmap to direct capacity-building and data governance activities and a legislative intervention introducing sectoral data-sharing rules, directed to encourage and enable B2B and B2G data transfers, facilitate the reuse of digital cultural heritage assets to be made available on the CHDS and ensure the free flow and reuse of public- and private-sector data by a multitude of stakeholders for both commercial and non-commercial purposes.

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PART II

Practices



Shifting Imaginaries of European Cinema

Fernando Ramos Arenas

INTRODUCTION

In May of 2023, the European Film Forum, a platform created in 2014 to promote dialogue between policy makers and stakeholders of the European audiovisual sector, published *The European Media Industry Outlook*.¹ During his presentation of this report, EU Commissioner for Internal Market Thierry Breton highlighted three aspects related to recent developments in the audiovisual and media context: he focused on the relevance of intellectual property for the creative sector, he stressed how important it is to protect the uniqueness of continental productions (both in terms of industrial independence and of a certain ‘Europeanness’ that was not further explained) and to keep pace with technological

¹The document relies on independent research commissioned in 2022 and 2023, based on stakeholder input, market analyses and consumer surveys, as well as secondary data sources (European Commission, 2023).

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involvement—in this case, artificial intelligence was explicitly mentioned.² That year's Film Forum focused on the *competitiveness* of the European media and audiovisual industries: augmented reality, Video-on-Demand (VoD) platforms and the growing videogame sector were often mentioned as promising areas for development. Cinema however seemed to be overlooked, both in the presentation of Commissioner Breton and in the report itself. And yet, the presentation took place at the Cannes International Film Festival during those two weeks of the year when the French city becomes the film capital of the world.

In a form that was surely unintended, this event emphasised the complex, paradoxical relationship that European cinema has with a broader audio-visual ecosystem, a relationship that is central to the understanding of today's European film industry and the question of its (lack of?) competitiveness. It also encapsulates some aspects this chapter seeks to explore from a film-cultural perspective, while focusing on the role played in this matter by festivals and especially Cannes.

Placing *cinema* at the core of these reflections on the European *film* industry opens a debate central to the historical transformation addressed in this text and to the subjects explored in other chapters of this book (see for instance the case study analysed by Caballero Ruiz Martín de Esteban, which focuses on cinephilia on streaming platforms). The document presented by Commissioner Breton mentioned cinema together with television and video-on-demand services, “as well as the films, series and documentaries produced to be distributed through these media” (European Commission, p. 11) as part of the audiovisual industry. However, the issue is more complex than the differentiation implied by the report, in which cinema was conceived merely as exhibition form; it also addresses questions of cultural, political and economic nature that are key to tracing the transformation of the audio-visual industry during the last thirty years.

By the mid-1990s, classic, cinephile laments about the *end of cinema* by critics and intellectuals (see Sontag, 1996, as one of the most relevant), but also from established filmmakers (Jean Luc Godard's *Histoire(s) du cinéma*, 1988–1998) and radical newcomers (*Dogma 95* may embody the most relevant response emanating from the core of the European film production) appeared to strengthen the argument of a film history rapidly

² See for the presentation at the *Marché du Film* of 2023: <https://www.youtube.com/watch?v=suAFwhRIbns&t=2485s>.

entering its post-cinematic phase or at least, of a film history significantly redefining its references, forms of consumption, spaces and values. This period was marked by cinema's gradual transformation within a broader audiovisual context and its integration in a market increasingly populated by new global players. The process also implied a challenge to Europe's centrality in the traditional film historical canon, which was being dramatically questioned in this new 'global phase' of world (post)cinema (Andrew, 2009). Thomas Elsaesser built on this interpretation when he pointedly noted how, "as in other areas of economic and cultural life, the de-centering of Europe as a consequence of globalization has also led to a loss of prestige for art and auteur cinema." (Elsaesser 2015, p. 17). Digitalisation and media convergence have usually been highlighted as central forces in this ongoing process and yet the transformation also reflected deeper, older changes in film production, distribution and exhibition, in audiences' behaviour and preferences, as well as in the references that constitute the continent's cinema (Galt, 2006). Some of these shifts were already underway in the 1980s, as with the successful spread of video cassette recorders, multiplexes or commercial television in most European countries.

This change was not only registered by creators, cultural critics and academic researchers: the legal strategies and policy documents adopted by the European Commission and the Council of Europe to manage the audiovisual industry since the beginning of the 1990s also fostered this development. After decades of policies conceived to ensure the viability of national cinematographies based on concepts such as artistic quality or cultural relevance, the issue of European cinema's competitiveness (in the internal market, in the changing global context and in relation to other audiovisual offers) seemed then to become central in its governance. With mixed results: in 2005, Elsaesser stated in one of the main articles which tackled the notion of Europeanness in the continent's production, that "decades of state subsidy and the various partnerships with television have not been able to make European cinema an internationally competitive creative industry" (Elsaesser, 2005, p. 499).

Research carried out by the Horizon Europe project REBOOT confirms this centrality of competitiveness as a central concern in European governance since the beginning of the 1990s. But these findings also highlight that the concept has proven extremely adaptable, following the EU's intent to strike a balance "between its continuous efforts to ensure optimal conditions of competitiveness for Europe's audiovisual industry

(eventually covering both linear and non-linear services) and the promotion of the irreplaceable cultural fabric of the Union's Member States" (Psychogiopoulou et al., 2024, p. 162).

A closer look at these legal dispositions, but also at how the industry sees itself, reveals that at least two ways of understanding the term seem to overlap. The term competitive may apply to a European (film) industry that is rich in alternatives, where different voices and parties (micro, small and medium-sized enterprises) are present and punctually ally to promote projects that enjoy different ways of circulation, in different countries of the internal market, thus creating a model better equipped to ensure cultural diversity and the democratic values usually associated with the European project. But a competitive European film industry may also be perceived in a broader global context that requires fewer and stronger players, that is, a model better prepared for international competition, whether it be in merchandising or in the production of audiovisual goods and services. Although these two models are not mutually exclusive, their coexistence sometimes generates unresolved paradoxes, as neither of them has proven itself capable of simultaneously fostering both cultural diversity and economic competitiveness.

Disruption, however, is not the only force shaping this process. While legal instruments and policy documents reflect and attempt to steer the deep transformations of this era, perspectives from audiences and industry stakeholders (producers and specially distributors and exhibitors)³ are clearly more complex in their appreciation of these changes. Among these groups, the general recognition of this transformation runs parallel to the persistence of a *certain idea* of European film that corresponds to (or at least assumes) some of the values historically associated with the *European art cinema* model. Ducan Petrie (1992), Wendy Everett (1996), Ginette Vincendeau, Tim Bergfelder (2015), Thomas Elsaesser (2005), Valeria Camporesi (2023) and others have examined the centrality of these productions, which, being "aesthetically innovative, socially committed and humanist in outlook" (Vincendeau, 2000, p. 56), helped to articulate for decades the construction process of a common European identity as

³ Interviews carried out in WP2 of the REBOOT project by Universidad Complutense and Ghent University. See also the Nostradamus reports that have been published by Göteborg Film Festival since 2014. The reports aim to sketch out the future of the screen industries 3–5 years ahead mainly through interviews with industry experts and research.

European film history.⁴ Even in most recent decades, changes in the European film industry have usually been conceptualised following a bipolar logic regarding the opposition of art and industry in all its different and often oversimplified variations: auteurs vs. commercial directors, European films vs. Hollywood productions, or even cinema vs. audiovisual. Reality though has usually turned out to be more intricate, recognising a development in which both terms of the opposition are complexly intertwined.

This text aims to explore the transformation of this idea beyond a simple opposition of continuity and rupture, that is, as a shift in the *historical imaginary* of European cinema since the 1980s, when classical paradigms that since the post-war period had shaped European film (such as auteur, national cinema and/as arthouse cinema) had to be fundamentally rewritten in light of new changes and challenges. In this regard, what if those tensions are not anomalies to be resolved, but creative frictions that may generate (sometimes from the margins of the industry) the necessary energy to keep fostering European film industries?

European film festivals, and Cannes in particular, present a stimulating, multifaceted case for analysis. Once centres of governmental sponsorship and creators of cultural value (not least by motivating critics to write about the films they choose and audiences to study them in universities), since the early 1990s they have also become central channels of circulation and key forces in the film industry. This has had consequences for the functioning of the other elements also related to film culture, such as taste or value. Directly affected by the digital transition and severely hit by the COVID-19 pandemic, European cinema has found it increasingly difficult to reach its former audiences in its traditional spaces (European Commission, 2023, p. 11). In this situation, festivals among museums, cultural centres, web communities or specialised digital platforms have turned into central nodes of contemporary film culture. They provide spaces and networks for the production, distribution and even exhibition of arthouse cinema, apart from securing—in a more traditional way—much needed media presence and cultural capital.

⁴These works illustrate how the study of European cinema as an autonomous category is also a recent phenomenon (limited to the last three decades) and should also be read in light of other legal, institutional developments. See in this regard the emergence of networks such as *European Cinema Research Forum*, NECS and journals such as *European Cinema Journal*, *Studies in European Cinema* or *NECSUS*.

Festivals are today one of the last refuges for cinephile audiences, pivotal institutions in the creation of cultural value and in the fostering of the aforementioned historical imaginary. But they have also become important in the reconfiguration of the *European film industry* and its competitiveness beyond the principles that have traditionally shaped it in each of its three dimensions: (a) its *Europeanness*, (b) the importance of *film* (or cinema, in its *purest* form) within a broader audiovisual landscape increasingly dominated by videogames, DVDs, VoD and other competitors to the film experience and (c) both the cultural and commercial considerations that lie at the core of the *industry*.⁵ To illustrate these arguments, the text will now take a specific example from Cannes, the world's most prestigious film festival, but also a successful "media event that is as much a part of the art house and smaller budget productions of world cinema as it is of the lavish marketing strategies for blockbusters," as Marijke de Valck (2007, p. 121) stated in her seminal study on festivals. In its polyhedral nature, Cannes can help appropriately illustrate the complexity of European cinema. The text will address these questions with reference to a recent, specific and telling case study: Victor Erice's film *Close Your Eyes* (2023).

A HISTORICAL IMAGINARY IN TRANSITION

Parallel to the presentation of *The European Media Industry Outlook* by Commissioner Breton, on the 22 of May of 2023, the film *Close Your Eyes* by Víctor Erice was being screened as part of the section Cannes Première in the Debussy theatre. The event drew the attention of the cinema world: attendees included, as the industry site *cineuropa* put it, "international colleagues of the 82-year-old Spanish super-auteur, such as Amat Escalante, Gilles Marchand, Nicolas Saada and Hirokazo Kore-Eda" (Lumholdt, 2023). Erice's film historical relevance (his debut *The Spirit of the Beehive* film is the only Spanish contribution on the latest *Sight and Sound* list of the Greatest Films of All Time (Sight and Sound, 2022) and his meticulous, sparse production rhythm (four feature films in fifty years) secured

⁵ Film festivals have established themselves as one of the main research areas in Film Studies over the last two decades. See in this regard the pioneering volume of Marijke de Valck (2007), the edited volume by Dina Iordanova, which summarises main research approaches and the website for the Film Festival Research Network (<http://www.filmfestivalresearch.org/>) that provides specific information about historical and contemporary research in this area.

the expectation that accompanied this premiere. Festivals are ritual events, spaces of encounter and celebration and the screening helped to channel symbolic values of this community celebrating a certain idea of cinema that is crucial for the European film industry (see also the chapter by Lähdesmäki and Hiltunen in this volume).

The conceptualisation of European cinema cannot be limited to the European film industry. Cultural imaginaries determine the circulation, consumption and discussion of European titles in their countries, on the continent (promoting its cultural integration) and beyond Europe. In fact, these imaginaries seem to be the strongest force that channels the diversity that still characterises the film production in Europe. And while they surely do not apply to all kinds of European productions (there is, in fact, still some significant reluctance to incorporate popular references—is for example, the James Bond franchise part of this?—while for decades East-European cinemas struggled to be integrated in this canon), its strength can still be felt in such prosaic areas such as film policies, aids and regulations. While acknowledging the weight of popular cinema, I am also making the case for the survival of certain narratives around art cinema that are still very present in the current industry, its governance and its competitiveness.

It is therefore worth pointing out the characteristics of this *historical imaginary* of European cinema. As originally formulated by Thomas Elsaesser in reference to the debates on national cinemas, this is a concept that is “both cinematically specific and historically grounded” (Elsaesser, 2005, p. 22), a historical set of references “onto which other histories and screen memories [...] project themselves or are being overwritten” (Elsaesser, 2000, p. 4), a *Doppelgänger* that lingers on other periods of the national film history and combines historical and historiographical considerations. The term was originally conceived as a conceptual alternative to the more traditional, static and somehow essentialist idea of national cinema and referred to the case of Weimar cinema as the historical imaginary of German cinema (it was for instance foreshadowed by the *Kino-Debate* of the 1910s, or helped to lend historical weight to the New German Cinema of the 1970s), but similar approaches could be used while referring to other national contexts, such as the French new wave or, as the case here, to European cinema as a whole.

In this regard, European Art cinema of the 1960s can be seen at the core of this historical imaginary constructed against a symbolic ‘other’; the industrial power of Hollywood majors, the dominance of ‘producer’ in the

film process, the ‘superficiality’ of Hollywood’s productions or the most popular national titles, but also against the radical avant-garde.⁶ That is, the historical imaginary of this European film could be defined in terms of an auteur cinema with a realistic base, intellectual, vaguely progressive ideologically and with artistic aspirations, which may be too much of a narrow definition of what European cinema has been, but still provides a central conceptualisation of the continent’s film production; returning to our case study, this is also what Erice’s career was embodying at the Cannes’ premiere.

Originally explained around a set of stylistic and thematic qualities identified with those of a cinema of modernity, the weight of this European Art Cinema clearly transcends the films. Its relevance is felt to this day in its historiographical centrality (Bálint Kovács, 2007) but also in more prosaic areas that are relevant for this volume: the way production, distribution and exhibition (the term arthouse cinema, as this kind of films are also commonly known, relates indeed primarily to the spaces of consumption) are approached in public policies is still intimately linked to this historical imaginary. The European Commission operationalises this concept, for instance, when it considers the film (and audiovisual) sector as vital to safeguarding Europe’s cultural diversity and sovereignty in a way that may be unheard of in other geopolitical or even historical contexts—even the 1946 Blum-Byrnes agreements between the United States and the French government, which are usually mentioned in this regard as one of the main episodes in the genealogy of *exception culturelle*, were conceived primarily in economic terms.

Beyond the implicit exclusion of many commercial productions, I am also aware of some of the other paradoxes implied by this interpretation. With filmmakers such as Jean-Luc Godard, Ingmar Bergman, Federico Fellini or Robert Bresson, continental art cinema gave birth during the 1960s to a series of references that are also central in each national film culture: Bergman as representative of Swedish spirituality, Fellini of Italian exuberance or Godard of French intellectual playfulness. Yet it is exactly this apparent contradiction between the national and the continental that constitutes European cinema.

National and continental representativeness are built on transnational circulation, exhibition and dialogue: a dialogue in which leading film

⁶Thomas Elsaesser explored this centrality of a film culture structured around the art cinema still *in national terms* in 2005, p. 42.

festivals, such as Cannes, become central symbolic spaces for cultural exchange. Since the post-war years, they have been key in the configuration of this historical imaginary as generators of cultural value and in granting ‘Europeanness’ to the productions exhibited in them. Since the 1990s, *Palme d’Or* winners such as the pan-European coproduction *Underground* (E. Kusturika, 1995), the Greek drama *Eternity and a Day* (Th. Angelopoulos, 1998), the Irish/British production *The Wind That Shakes the Barley* (K. Loach, 2006), the Romanian drama *4 Months, 3 Weeks and 2 Days* (C. Mungiu, 2007), or the Austrian *The White Ribbon* (M. Haneke, 2009) demonstrated how an actualisation of the historical imaginary would look when represented by films telling a very local story that enhances the broader discourse of European history. Justine Triet’s recent *Anatomy of a Fall* (2023) updates this tradition around a story that is (in its settings, figures, actors, circulation...) eminently European, while it simultaneously highlights a traditional absence at the core of this historical imaginary: that of women filmmakers.⁷

Beyond their cultural relevance, international festivals find themselves in line with advertising and distribution, allowing the selected and awarded films to rotate within the circuit and helping them secure distribution deals in different markets and platforms. This industrial ecosystem also impacts the very conception of the works that are part of the circuit: “Even without direct festival support, producers and directors today are tempted to shape their work to appeal to the taste of those deciding which films get selected (therefore, in many cases which ones obtain completion money)” (Andrew, 2009, p. 81). While the last few decades have been central in this development, it is also built on longer standing structures: in 1959, the *Marché International du Cinéma* was founded; in 1988, the Rotterdam Film Festival, the most alternative among the large European festivals and a child of the 1968 unrest in the European film community, started to support its favourite filmmakers.

Together with Venice, Locarno, Berlin or San Sebastián, Cannes has presented itself historically as part of an alternative circuit that could escape the dominance of US distributors in most European countries (while still feeding on Hollywood’s productions, stars or promotional work): “a relatively horizontal (this is not to say non-hierarchical) system of circulation

⁷ It is in this regard telling how this also started to change during the 1990s, with Jane Campion’s *The Piano* (1993). As of 2024, Campion, Julia Ducournau (2021) and Justine Triet (2023) are the only female directors to have won the *Palme d’Or*.

alternative to Hollywood's vertical model of commercial distribution" (Vallejo, 2020, p. 167).

It is in fact on this level that festivals may present themselves as mediators in one of the key questions that bother the European film industry and still tends to be absent in the policies aiming to foster its competitiveness over the last 30 years: its relationship with Hollywood and other global players. The aforementioned report noted how legal strategies and policy documents adopted by the European Commission and the Council of Europe have shown (over the last three decades) great reluctance to explore the 'value chain' of the industry: it also summed up the situation in critical terms, as it "potentially leaves the 'competitiveness' framework in European audiovisual policy ill-equipped to contemplate international competition, whether it be in merchandising or the production of audiovisual goods and services" (Psychogiopoulou et al., 2024, p. 49). In more general terms, "the disregard for international competition while addressing 'competitiveness' contradicts the EU definition of global trade applied to most goods and services in the today interconnected world" (Psychogiopoulou et al., 2024, p. 49).

Festivals can in fact provide some solutions to the complex power relations between Hollywood and the European film industry, as they have become both a global distribution network that parallels those of commercial cinema and a necessary addition to more commercial interests. While smaller festivals in particular have usually been conceived in opposition to this commercial cinema, events such as Cannes have for decades nurtured a more complex relation to its productions and to Hollywood in general; a relation marked in different degrees by economic benefits, industrial interests, artistic recognition, glamour, media presence etc. (see de Valk, 2007, Iordanova, 2013; Jungen, 2014). Cannes obviously profits in this regard from the recognition associated with the yearly presence of Hollywood stars on its red carpet. But, at the same time, it is hard to deny that productions such as the recent *Elvis* (B. Luhrmann, 2022), *Top Gun: Maverick* (J. Kosinsky, 2022) and *Triangle of Sadness* (R. Östlund, 2022) owe at least *a part* of their best picture Oscar nomination to their presence at the *Croisette* in 2022.

At least until the 1970s, the function of festivals was still inextricably linked to the question of national, and later European, representativeness. Over the decades, they have also become central for those small- and middle-scale production companies and independent filmmakers and producers that constitute the core of the European film industry. Festivals are

also crucial to showcase relevant results of the EU's cultural policies. In 2023, Cannes presented for instance nine films supported by the MEDIA strand of the Creative Europe programme; four of them competed for the *Palme d'Or*: *Club Zero* by Jessica Hausner, *La Chimera* by Alice Rohrwacher, *Rapito* by Marco Bellocchio and *Four Daughters* by Kaouther Ben Hania.

It is noteworthy that none of these films were produced by streaming platforms, a central area of development for the continent's film industry, as this adds another level of complexity to the festival's position among industry players. Since 2018, Cannes does not allow series or films for competition that have not previously been screened in cinemas. While other festivals such as Venice seem to take advantage of this (Alfonso Cuarón's *Roma*, which received the *Golden Lion* in 2018, became the first movie produced by a streaming service, *Netflix*, to win at a major festival), Cannes' decision also helps in the long run to secure the cinephile allure that is central for the festival's identity.

Besides, Cannes' position may be explained as an attempt to save *cinema* (as a whole), but the forces behind it seem rather to be *the French cinemas*. The weight of French producers and distributors helps explain the decision. At the same time, the disproportionately large presence of French films in the competitive section is also a point of criticism.⁸ There are surely good reasons for that; reasons that at the same time question the credibility of an *International Film Festival*. But the fact is that France "is also the only European country still to possess something like a national film industry and a film culture" (Elsaesser, 2005, p. 36) capable of channelling this kind of opposition against media trends.⁹ Although constantly in transformation over the last decades, the imaginary of the European cinema nurtured by the festival remains a very French one, thus reformulating one of the frictions that usually arise in the conceptualisation of the continent's cinema (Mazdon, 2007).

The concept of historical imaginary has been the subject of considerable debate in other ways that are also central to the questions addressed in this chapter. Elsaesser himself pointed out some of its limits when

⁸ Six from the 21 films presented during the 76th edition (2023) were French productions (or participated by French producers); in 2022, 12 out of 21 were French productions or participated by French producers (five of them were represented by the same sales agency: Wild Bunch).

⁹ See also the ill-fated case of *SALTO*, the French project that would have channelled a European alternative to *Netflix*.

analysing (European) cinema from the 1980s onwards, as an altered socio-historical context and a new media intertext transformed the national in a “second-order reference” (Elsaesser, 2005, p. 26). These factors involved a radical transformation of cinema audiences, in part due to the rise of commercial television, EU enlargement to the East or the emergence of global cinemas.¹⁰ Back then, national film cultures began to be shaped by the recognition of cohabitation and mutual interference (central in the financing, production, distribution and advertising of films). Thus, new references and therefore new imaginaries emerged.

Against this background, while the very idea of European art cinema seemed to be rapidly becoming a product of a bygone era (often protected by a nostalgic appreciation), European cinema’s historical imaginary indeed continued to evolve, even deep into the twenty-first century, just as the delightful posters of the Cannes International Film Festival and the canon of European auteurs such as Pedro Almodóvar, the Dardenne brothers, Michael Haneke, Cristian Mungiu, Christian Petzold, Béla Tarr and Lars von Trier regularly remind us. Thus, it seems as if the transformation of the festival circuit into a global network (see the increasingly relevant American or Asian festivals such as Toronto in Canada and Sundance in US or Busan in South Korea throughout the 1990s) had also run parallel to the reconfiguration of European cinema in ways that directly address the question of its competitiveness.

A CERTAIN FORM OF COMPETITIVENESS; OR, WHY FESTIVALS STILL MATTER

On the evening when *Close Your Eyes* was presented, there was an important absence: its director had stayed in Spain while the film was represented at the festival by the actors and other members of the crew. This reaction generated some speculation in the specialised press and seemed to reinforce Erice’s legend as a reclusive filmmaker. In a career spanning more than fifty years, he had until then only made three full-length films: *The Spirit of the Beehive* in 1973, *The South* in 1983 and *Dream of Light* in 1992. Then, on May 23, the leading Spanish newspaper *El País* published an open letter by the director in which he explained his decision not to attend the Festival: he criticised a lack of “dialogue and consultation”

¹⁰For the categorisation of global cinema as the last part of the transformation of world cinema, see the differentiation proposed by Dudley Andrew (Andrew, 2009, pp. 80–86).

(Erice, 2023) with the organisers of the festival, who had not communicated their decision to him in time (the festival had decided to run the film in a less prestigious, non-competitive section). This, according to Erice, prevented him from presenting his work at the *Quinzaine des Cinéastes* (also in Cannes, but with its own selection criteria) or at other festivals, such as Venezia and Locarno. His absence at the premiere was a noisy form of protest.

Erice's reaction may be read as an affront against Cannes' independence but is also understandable, given the festival's long standing *politique des auteurs* towards other directors such as Wes Anderson, Ken Loach or Quentin Tarantino; *Dream of Light* had won Erice 1992 the Jury Prize and the FIPRESCI Prize at the festival, and in 2010 he had been one of the members of the Official Jury. His presence in the official competition in 2023 would have further secured the historical allure of the festival; his participation in the section *Cannes Première* was at the same time symbolic of how today's Cannes understands its mediating role between cinephile exclusivity and market imperatives: official festival competition works in a limited context, with selected competitors. But growing as a festival also means creating other forums for competitiveness that encourage the economic side of the event. At present, Cannes involves more than a dozen sections (apart from side events such as tributes, markets, masterclasses), which show how connected commerce and art, past and present, glamour and pedagogy are in an event of this size.

Close Your Eyes nevertheless profited from its presence in this other section. With a theme and a slow-paced narrative perfectly suited to addressing the historical imaginary described above, the film—a love letter to cinema about a director who investigates the disappearance of an old actor with whom he worked in his last, never completed work—enjoyed a successful run on the festival circuit. The picture was screened in San Sebastián, Toronto and New York, as well as in Busan, London, Rome, Vienna, Hamburg and Lisbon (where it won best film at the 17th edition of Leffest Lisboa Film Festival). By the end of the year, *The New Yorker's* film critic Justin Chang had chosen *Close Your Eyes* as the best film of the year (Chang, 2024).

Cannes also proved in the long term what an A-film festival means for a film, as it helped activate a necessary transnational network of distribution and exhibition spaces. Support for the film's distribution also came

from the Creative Europe MEDIA¹¹ and from other European markets, especially France: for the kind *auteur*/arthouse filmmaking that Erice still represents, a strong, well-connected, rich and diverse European film industry is pivotal. The film premiered in France in August with 70 copies (rapidly increased to 132) and reached Spanish cinemas by the end of September with around 100 copies (Redacción AV451, 2023). Notwithstanding the critical acclaim, *Close Your Eyes* ended 2023 as 28th among the most grossing Spanish films in its home country: 83,000 spectators bought a ticket to watch the film in Spanish cinemas; 142,275 had done so in Europe by the end of its commercial run, according to the Lumiere observatory (European Audiovisual Observatory, n.d.).

The EU's long-term emphasis on promoting micro, small and medium-sized enterprises seems best reflected in the creative ecosystem that flourishes around festivals as spaces that generate prestige, but also as industrial opportunities for this kind of smaller films. *Close Your Eyes* producer Cristina Zumárraga had originally attended the *Marché du Film* in May 2022 to initiate a production built on a tight time schedule: "It was like starting the house with the roof, we were looking for international partners before having any domestic financing, but I could not miss the opportunity of the *Marché*, nor wait for other markets" (Redacción AV451, 2023). Erice's name was central to putting together a project with many participants. Zumárraga's *Tandem Films* produced the film together with *Pecado Films*, which was central in securing the regional funds.¹² One of the main grants came from the Spanish National Film Agency ICAA (2022), which contributed one million euros that were partly supported by EU funding. The French company *Haut et Court* (producers and distributors) collaborated from the outset: it channelled an application for *Cinéma du Monde*, the French state fund for international co-productions, although *Close Your Eyes* was finally not awarded any grant. The film was financed as a Spanish-Argentinian coproduction. *Haut et Court* stayed on board, however only as distributors in France (Hopewell, 2023). *New Wave Films* acquired the UK-Ireland distribution rights, *Film Movement*

¹¹ <https://oficinamediaespana.eu/noticias/item/4010-festival-de-san-sebastian-2023-peliculas-apoyadas-por-media>

¹² Further partners were the Argentinian Pampa Films and Erice through his company, Nautilus. Audiovisual companies such as Movistar Plus+ and RTVE were central for the initial financing; Vodafone and public broadcasting companies Canal Sur, EITB and Telemadrid were also part of the project as they acquired exhibition rights that also enabled further public funding.

did the same for the US market. In Spain the film was also independently distributed by *Avalon*.

This diversity of partners invites us to reconsider the question of the competitiveness of the European film industry not just in terms of commercial positioning in a global film market, but also the rich system of (sometimes disparate or conflicting) interests and players in the production, distribution and exhibition within national and European borders. Festivals, especially after their reconfiguration since the early 1990s, thus offer an alternative to the dichotomy around the economic approach and cultural value that redefines the distinctiveness of European cinema in a global context.

CONCLUSIONS

What do cases such as that of *Close Your Eyes* tell us about the competitiveness of the European film industry? As central hubs for production and distribution, but also generators of debates and references that update European cinema's historical imaginary, festivals are central to sustain the industry's competitiveness; and yet they also address some of the paradoxes deeply intertwined with the term.

While their story can be told in many regards as a thriving one, they also help articulate the frictions which also shape broader areas of the European film industry. De Valck concludes her historical study by stating how continental festivals have generally succeeded in "establishing vital links with various other entities, such as European governments, Hollywood, the avant-garde and city marketers" (de Valck, 2007, p. 205) and celebrating their capacity for self-preservation. Their diversity of interests and agendas and their openness to a variety of people and parties have helped cement their presence among local communities, their relevance beyond cinephile circles and the building of an international circuit that secures spaces of circulation and exhibition for a certain type of artistically ambitious productions. This 'success story' is however only a part of the narrative, as this strength rarely transcends the festival and alternative circuits. Festivals "have not resulted in the creation of stable, financially independent industries for such films, and have, arguably, even prohibited initiatives for economic independence" (de Valck, 2007, p. 205).

These words were written when the era of VoD and streamers was not even in sight. And yet the deep transformations over the past two decades have not significantly changed the role of film festivals within the European

film industry and as part of a broader audiovisual sector. They may remain peripheral in the ocean of audiovisual content but are also central to securing the survival of European cinema and ensuring *a certain form of competitiveness* that makes it possible to negotiate economic and cultural concerns.

At the same time, when some months after the presentation of Commissioner Breton and the premiere of Erice's film, the Oscar Nominations for 2024 were announced, they seemed to confirm that Hollywood's and European preferences are not as far apart as usually assumed. Nine films from Cannes' 2023 official section were mentioned, including the *Palme d'Or* (*Anatomy of a Fall*; J. Triet, 2023) and the *Grand Jury Prize* (*The Zone of Interest*, J. Glazer, 2023), which received relevant awards during the Oscar night in March of 2024. *Anora*'s success (S. Baker, 2024) in 2024–25 may help prove that this was not just a one-off episode, but a sign of an industry understanding that securing cinema's distinctiveness means reformulating its preferences and connecting more closely with a tradition in which European film still has an important role to play. Only time will tell.

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CHAPTER 7

The Young Audience Award: Cultivating Future Audiences for European Cinema

Kaisa Hiltunen and Tuuli Lähdesmäki

INTRODUCTION

The competitiveness of the European film industry (EFI) relies on audiences interested in viewing European films. Consequently, cultivating audiences for European cinema is a method of enhancing the industry's competitiveness. The European Union (EU) aims at promoting and supporting the industry by encouraging young people to take an interest in European cinema and thereby ensuring its vitality (Soto-Sanfiel et al., 2018a, 2018b, p. 189, 2021, pp. 119–120). The EU collaborates with and finances organisations, such as the European Film Academy, who share these aims. This chapter asks how the European Film Academy seeks to build future competitiveness of the EFI by engaging young people as audiences of European cinema through the Young Audience Award (YAA). Moreover, it explores what the award-winning films tell us about young people's film preferences and what potential the YAA has as a film literacy project. This knowledge is important for considering how young

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people's views and agency could be better utilised for cultivating future film audiences and developing the competitiveness of the EFI.

The YAA is a category of the European Film Awards, organised by the European Film Academy, founded in 1989 to advance the interests of the EFI (European Film Academy, 2023). It is supported by the EU through its Creative Europe MEDIA programme. The Academy has awarded YAAs to European films since 2012. Young people aged 12 to 14, from 42 European countries plus Israel, Palestine and Australia, form the juries that choose the winner.

Despite the EU's dedication to promoting European cinema and film literacy to create future audiences, there is still relatively little academic research on young Europeans' conceptions about and attitudes towards European cinema particularly on a pan-European scale (Soto-Sanfiel et al., 2018b, p. 716). Research on European youth as cinemagoers and young people's conceptions of cinema began only in the late 1990s (Soto-Sanfiel et al., 2021, p. 121), concentrating mostly on their general media use. Of the few research projects conducted on this subject, the most relevant for our purposes are the cross-European comparative study carried out by María T. Soto-Sanfiel, Isabel Villegas-Simón, Ariadna Angulo-Brunet (2018a, 2018b, 2019, 2021) and two national surveys, the survey on young Belgian audiences by Aleit Veenstra, Philippe Meers and Daniël Biltereyst (2022), and the survey on young Danish audiences by Pia Majbritt Jensen and Petar Mitric (2023).

Soto-Sanfiel and colleagues found that European youth prefer US cinema and have a stereotypical image of European films considering them more intellectual, artistic, boring and of lower quality than US cinema. There was no significant change in the students' attitudes before and after the project despite the film pedagogical activities it included (Soto-Sanfiel et al., 2018a, pp. 205–206, 2021, p. 170. See also Mitric, 2022). Veenstra and colleagues also found that young Belgians prefer US films to European films and Belgian films to other European films. They point out that structural limitations affect viewing practices in general and particularly for young people. The current infrastructure favours Hollywood productions and that is what audiences all over Europe like to watch. According to them, “there is little circulation of national cinemas in Europe” (Veenstra et al., 2022, pp. 761–762). The study by Jensen and Mitric (2023, p. 156) showed a similar trend among Danish youngsters, with American content becoming “the standard.” Such results suggest that European cinema needs to be promoted to young audiences more effectively. The YAA has

great potential in this regard, especially through its pedagogical elements, but the prize and the awarded films have suffered from poor visibility (Lumiere database).

The data analysed in this chapter consists of the 11 YAA winning films, the European Film Academy's website, the educational materials produced by the Academy about the YAA films, an online meeting with the representatives and email interviews with one of them. Some of the films were viewed through video-on-demand platforms, others through viewing links acquired from production and distribution companies. The chapter seeks to answer the research questions using thematic analysis (Braun & Clarke, 2022, pp. 34–37) of films and critical close reading of the other material.

The chapter continues with an introduction to the YAA, its selection procedure and the criteria set for the competition. This is followed by a literature review of the genres of children's film, teen film and youth film, which offers a framework for the discussion of the YAA films' themes. After this, the award-winning films are introduced and their main themes and stylistic features discussed. The chapter ends with a discussion about what type of films the young juries prefer and evaluation of the potential of the award in building future audiences of European cinema and increasing the competitiveness of the EFI.

THE YOUNG AUDIENCE AWARD AND THE SELECTION PROCEDURE

The YAA, like other European Film Academy's awards, seeks to promote European films. Between 2012 and 2022, 40–60 films fitting the Academy's eligibility criteria were annually submitted to the YAA competition. The number of countries and cities involved in the YAA has increased over the years. In 2022, over 3,000 jury members from 42 countries voted for their favourite film as part of the awarding process whereas in 2017, just 31 countries participated (Young Audience Award, [n.d.](#)). The juries watch the films in cinemas or online in uncommercial screenings organised by the European Film Academy's national partners, which include film festivals, film centres, film agencies, film institutes and film educational organisations. In 2022, 76 organisations were involved in the process (for the awarding process see Young Audience Award, [n.d.](#)).

The YAA selection process is a transnational, constantly evolving film initiative including social, cultural and film industry aims. Over the years, there have been major changes in the selection procedure of three nominated films, increasing the role and agency of the young people. In 2012–2018, the nominees were directly chosen by five experts, such as film directors, producers and festival directors. This practice changed in 2019 when five experts started to pre-select six to eight films for the next stage of the competition. At this stage, a small jury of young people watched the preselected films and chose the three nominees (Email correspondence with a representative of the European Film Academy Productions, 6 June 2023, Young Audience Award, [n.d.](#)).

In 2020, the European Film Academy started to develop a European Film Club as a platform linking the YAA jury members and film professionals (see also Sarikakis et al. in this volume), bringing changes to the selection procedure. In 2022, for the first time a group of young people in the Consultation Group of the European Film Club participated in the pre-selection of eight films together with the experts (email correspondence with a representative of the European Film Academy Productions, 23 March, 13 April and 6 June, 2023). In the final stage of the competition, the young audiences from around Europe form a broad awarding jury that watches all three nominated films and vote anonymously. The jury members vote not only for their favourite but also rank all three films.

To qualify for selection, both the filmmaker and the film need to meet certain criteria. The YAA can be awarded to a European film whose director is born in Europe and holds a European passport. The main production country must be European, including both EU and non-EU countries. The criteria include three countries beyond Europe's geographical borders, namely Israel, Palestine and Australia. There are additional criteria for a *European film* based upon the Council of Europe Convention on Cinematographic Co-production (CofE, [2017](#)). As European Film Academy ([2022](#)) explains: "According to the Convention, a film qualifies as European if it achieves 16 points out of a possible maximum of 21 from a schedule of European elements. To give the most flexible definition, the European Film Academy uses a lower minimum of 13 points."¹

¹The European elements and the maximum weighting points of each element: director (4), scriptwriter (3), composer (1), first role (3), second role (2), third role (1), head of department—cinematography (1), head of department—sound (1), head of department—picture editing (1), head of department—production or costume design (1), studio or shoot-

Films eligible for the YAA competition must be full-length fiction, animation, or documentary films that are intended for theatre release and that address an audience between 12 and 14 years of age. The films must have had their premiere within a year before the YAA ceremony. Moreover, they must fulfil at least one of the following criteria: to have been selected for at least two major festivals, to have been awarded at least at one major festival, or to have been theatrically released in at least two countries or sold for such release (European Film Academy, 2022, email correspondence with a representative of the European Film Academy Productions, 6 June, 2023). The criteria, thus, emphasise the European production of the films and their recent success in the film scene.

The general social aims of the YAA initiative include building bridges between cultures, allowing peaceful exchange of views, raising awareness of important social issues, empowering young people, developing tolerance and greater understanding of one's European neighbours and providing the experience of being an active member of the European community (email correspondence with a representative of the European Film Academy Productions, March 23, 2023). These social aims are reflected in educational materials about the three finalists that the European Film Academy has provided for the young jury members and their teachers since 2017.

The educational materials include basic information about the films, followed by a note about potential triggers, an introduction to the films' themes and questions to facilitate group discussion. The materials emphasise that "young people should all have an equal chance to see a film without prejudice and any pedagogical influence and to form their own (first) opinions" (European Film Academy, 2018, p. 3). It is also noted that the themes that the young people bring up should determine the course of the discussion. The 2020 handout states: "The main thing is to find your own favourite and to be able to explain to others why you have made this particular choice" (European Film Academy, 2020, p. 2). In some of the handouts, the thematic introductions are rather thorough and may steer the discussion in the guided direction. Thus, the YAA process combines different aims which can be seen as somewhat contradictory. The awarding process is a competition in which the young audiences should make their decision independently, yet the process includes pedagogical veins seeking to support the reception of the films and discussions of their contents.

ing location (1), visual effects (VFX) or computer generated imagery (CGI) location (1), post production location (1), altogether 21 points (CofE, 2017).

CHILDREN'S FILM, TEEN FILM AND YOUTH FILM AS GENRES

The YAA addresses a challenging target audience and genre in terms of developing the EFI. *Children's films* are films that have been produced primarily with a young audience in mind, that are thus suitable for children and that deal with children's experiences (Brown, 2017, pp. 3–4). According to British film historian Noël Brown (2017, p. 11), children's cinema “must possess a set of textual and associative significations that differentiates it from cinema intended primarily for adult audiences. In very simple terms, this is why most people—not just children—know children's films when they see them.” Because such films can be of any genre, children's film is treated here as a broad larger category that is ahistorical and non-thematic, unlike genres, which change according to socio historical contexts (Brown, 2017, pp. 17–19). Genre may be argued to refer firstly to Hollywood's producer-led film industry and not to be the best term for describing European films. However, genre categories are a useful way to differentiate films and they are used in the YAA handouts prepared by the European Film Academy.

Brown (2019, p. 227) has noted that during the last two decades, the category of children's film has become blurrier. Children's films have started to address difficult and sensitive themes and have become more complex narratively and aesthetically. Filmmakers have also become more interested in making *family films*, films intended for both children and adults, for economic reasons (Brown, 2017; Kümmerling-Meibauer, 2013, p. 39). According to Brown (2017, p. 17), the two categories mainly overlap, but there are some differences, for example, family films are less explicitly moralistic or educational. The increased complexity of children's films means, according to Bettina Kümmerling-Meibauer (2013, p. 39), that the producers of children's films have started to take this kind of film and its audiences seriously. Such developments reflect the aim of increasing potential admissions in the context of tight competition for bigger audiences.

Some film researchers specify children as those aged 12 or younger (Brown, 2017, pp. 3–4), so the age range of the YAA, 12–14, can be said to include both children and teenagers. *Teen films* are intended for teenagers, or young people aged roughly 13–19 and this is reflected in the films' content, but the genre categories overlap. Just like children's film, teen film is an umbrella term under which various subgenres and styles fit (Driscoll, 2011, p. 135). Still, as Catherine Driscoll (2011, p. 65) notes,

some components are typical of teen films: “So teen film requires adolescents, but it is very likely to include high school, parents, popular music, peer groups and sexual or romantic interest. It will often include fewer central components like drug use, virginity, parties, dances, or makeovers.” Driscoll’s description refers first to US teen films, whose influence can be seen in films targeted at young people all over the world.

Driscoll (2011, p. 149) has noted that because the term teen film has connotations of Hollywood films and tropes like high school and prom, some researchers have chosen to use the term *youth film*. They have done so to broaden the scope of research to cover youth cinema of the rest of the world, in which the commodified youth culture familiar from Hollywood films does not necessarily figure so strongly. Adopting the term youth film can also be seen to signify serious attention to films that deal with youth (Driscoll, 2011, pp. 1–2, 150). This is the term preferred in some European studies that focus on non-US cinema. Romain Chareyron and Gilles Viennot (2019, pp. 5–7) for example argue that French films about youth are freed of the clichés typical of the teen film genre and that they do not follow a preconceived idea of youth and coming of age. Gemma Edney (2019), in contrast, notes that some of the French youth films, in fact, have many similarities to Hollywood teen films.

Most of the YAA films are clearly made for teen or pre-teen audiences because they deal with young people’s lives and young people appear in all of them as main characters. In some of the films, younger children’s capacities and tastes have been considered in the contents, narratives and cinematic styles. Some can be categorised as family films that offer something for everyone, as Tommi Röpötti and Titta Karlstedt (2021, pp. 33–34) have characterised the category. In the analysis, mainly the term youth film is used, for the reasons described above, but the term children’s film is also used to make distinctions about the films’ styles and target audiences.

ANALYSIS OF THE AWARD-WINNING FILMS

Key Themes

The YAA winners provide a sample of European youth films that the European film professionals consider to be of high quality and that young audiences prefer. Table 7.1 summarises the winners indicating how these films are mostly produced in Western Europe.

Table 7.1 Summary of the YAA winners

<i>Awarding year</i>	<i>Title (translation/ original)</i>	<i>Production year</i>	<i>Production country</i>	<i>Language</i>	<i>Genre</i>	<i>No. of other received awards</i>
2012	Kauwboy	2012	The Netherlands	Dutch	drama	14
2013	The Zigzag Kid / Nono, het zigzag kind	2012	The Netherlands	Dutch	adventure, drama, family	7
2014	Regret! / Spijt!	2013	The Netherlands	Dutch	drama, family, music	9
2015	The Invisible Boy / Il ragazzo invisibile	2014	Italy	Italian	action, adventure, comedy	7
2016	Miss Impossible / Jamais contente	2016	France	French	drama	1
2017	Goodbye Berlin / Tschick	2016	Germany	German	comedy, drama, family	6
2018	Wallay	2017	France, Burkina Faso, Qatar	French	drama	5
2019	Fight Girl / Vechtmeisje	2018	The Netherlands, Belgium	Dutch	action, drama, family	9
2020	My Brother Chases Dinosaurs / Mio fratello rincorre i dinosauri	2019	Italy, Spain	Italian	comedy, family	7
2021	The Crossing / Flukten over grensen	2020	Norway	Norwegian	adventure, drama, family	2
2022	Animal	2021	France	French, English	documentary	2

Source: Web site of the European Film Academy and, for genres, the Internet Movie Database (IMDb, [n.d.](#)) and for the other received European awards for the YAA films by the submission date of this text, IMDb ([n.d.](#)) and European Children's Film Association (ECFA, [n.d.](#)).

The thematic analysis of the winning films revealed three broad and partly overlapping themes. These themes reflect the typical contents of youth films and thus reaffirm topics that youth audiences are typically considered to be interested in.

Coming of age is a theme that runs through the winning films. It is understood in this context to broadly mean the transition from childhood innocence towards adulthood, also considering small steps in maturation. Youth films typically deal with coming of age, which distinguishes them from films aimed at adults (Hermansson & Zepernick, 2019, p. 4). Growing up leads young people into conflict with their environment, for example, when they fail to meet or intentionally challenge adults' expectations.

Growing up is often seen in films as a period of dramatic transformation involving rites of passage that, in contemporary European societies, are more often symbolic than literal. Two films include a religious coming-of-age rite. At the end of *Zigzag Kid*, the main character Nono's bar mitzvah is celebrated. In this Jewish rite, a 13-year-old boy passes into adulthood. The adventure Nono experienced before that, during which he learned important things about his family's history—and thus about himself—is also a kind of coming-of-age rite. The main character of *Wallay*, Ady, is sent to his father's homeland in Burkina Faso as a disciplinary measure, because he has stolen money belonging to his father. There, his great-uncle begins to organise Ady's circumcision, but Ady rebels against it and the idea is eventually abandoned. For Ady, the actual coming-of-age rite is a trip to a foreign country and culture, which teaches him a lot about life and responsibility. In *Goodbye Berlin*, the boys' road trip is a rite of passage, an "experience of limits" and a good example of the temporary utopia described by Driscoll (2011, p. 112), where the characters feel free to do whatever they want.

In other films, the rite of passage can be interpreted as learning to curb one's impulsiveness and becoming a boxing champion (*Fight Girl*), getting distracted by mean lies and realising one's own mistakes (*My Brother Chases Dinosaurs*), helping other children to safety and changing one's worldview in a direction that accepts others (*The Crossing*), witnessing the cruel consequences of bullying and regretting taking part in it (*Regret!*) and being encouraged to perform as a band singer and giving a successful performance (*Miss Impossible*).

Belonging appears in the winning films as another broad theme from which subthemes can be distinguished. Belonging has to do with the

emotional sense of being attached to or identifying with groups of people, places and worldviews, and it involves formal and informal processes of inclusion and exclusion. It has also been described as a feeling of being at home. The experiences and negotiations of belonging shape one's identity. Belonging is understood as more fluid than identity and therefore more appropriate to describe the experience of today's mobile people (Lähdesmäki et al., 2016; Yuval-Davis, 2004, 2006). Films can make visible personal feelings of belonging and non-belonging but also exclusionary practices that separate groups of people (Hiltunen et al., 2019, p. 15; Lähdesmäki et al., 2016).

The young people in YAA films struggle with finding their place in their peer group, in the larger society, or even in their family. In most films, the theme of belonging is present on an implicit level through its opposite, not belonging. The feeling of not belonging can arise from the experience of otherness or difference, which takes many different forms. In *Wallay*, the son of immigrant parents opens to a completely new culture and outlook on life in his father's homeland. At first, he feels detached, but manages to form emotional bonds with relatives he has not met before. In *Goodbye Berlin* Maik suffers from the feeling of being an outsider. The film does not give a clear reason why Maik is excluded from parties and other activities, but suggests that it has something to do with his upper-class background and family situation. The situation of Maik's travel buddy Tschick is even worse for even Maik does not want his company at first. Maik and Tschick, who apparently lives in an institution, eventually enjoy each other's company.

In *Miss Impossible*, the impulsive Aurore feels that she is less valuable in the eyes of her parents than her sisters who are successful at school. Moreover, she is going through a lot in terms of sexual identity and tests her parents with provocative questions. Aurore's rambunctious nature does not make life easy at school either. However, when she finds a meaningful band hobby and motivation, things go in a better direction.

In many of the YAA films, conflicts arise among family members, or families are broken. *My Brother Chases Dinosaurs* emphasises the importance of family ties and family as a refuge where everyone is accepted as themselves. Conflicts arise when the teenage protagonist Jack suddenly denies the existence of his brother Gio, who has Down syndrome. He craves more independence and helping Gio feels like a burden, so he lies to his new friends that Gio is dead. However, lying only leads to difficulties and guilt and the boy learns to appreciate his family and brother again.

The documentary *Animal* takes the theme of belonging to the level of all living beings. Its young protagonists ponder how they could make humankind understand their dependency on other animals and that destroying nature ultimately means destroying ourselves. On Earth, all life is intertwined and thus also belongs together.

The third theme, *social challenges*, is connected to the difficult situations and conflicts experienced by young people in family and school environments. The most common social problem connected principally, but not only, to the school environment is bullying. The reasons for bullying range from physical appearance to illness and factors that remain unclear, and the films exemplify different degrees of bullying. A bullied person is excluded from the company of others, which causes feelings of non-belonging. In *Regret!* and *The Invisible Boy*, bullies work in a group and bullying takes the worst possible form, physical assault. In the former, cruel and systematic bullying leads to the suicide of the bullied. In the latter, bullying is presented as part of the main character's school life before he gains superpowers.

Timothy Shary and Alexandra Seibel (2007, p. 4) have explored youth films and claim that in them "the most common characterisations of youth globally are in terms of delinquency" and list crimes, such as drug use, theft, rape and murder, via which youth is often dealt with in these films. They note that young people are not always the ones to perpetuate these crimes but are also targets of delinquent acts committed by other youngsters or adults. Many of the YAA films portray young people as perpetrators and victims of serious delinquent acts. The mob in *Regret!* is guilty of systematic persecution. For Tschick (*Goodbye Berlin*), committing petty crimes appears to be an everyday action. Ady has stolen money, Bo (*Fight Girl*) hits boys on the street and Jack (*My Brother Chases Dinosaurs*) smokes weed and sends letters in the name of neo-Nazis. However, in most cases, it is a question of a "good kid" having made some mistakes. In terms of film style, YAA films do not offer much brutal social realism, and even in the haunting *Regret!*, the depiction of violence is distanced.

These violent actions do not happen in a vacuum: most of the protagonists come from broken families that have unresolved issues. The films deal with divorce, illness, substance abuse and death in the family and thus family issues can be singled out as another subtheme of social challenges. Not only young people are to blame for conflicts, but also adults struggling with their own problems, who make mistakes too and behave inappropriately. Mothers are either dead or absent for some other reason in

Kauwboy, *The Zigzag Kid* and *Wallay*. Both biological parents of Michele in *The Invisible Boy* are absent until he finds out that they are alive. In *Fight Girl*, the parents argue about the custody of the children, but Bo washes her hands of the whole matter. While Maik's mother in *Goodbye Berlin* spends the summer holiday in rehab, his father goes on a holiday with his secretary.

The mother of *Kauwboy*'s main character, 10-year-old Jojo, has died and the embittered father cannot take care of his son and physically abuses his child. Even at the end, after harmony is restored, the viewer is left with an uncomfortable feeling. *Kauwboy* is not a soothing and encouraging children's film. It brings out the unpleasant things that happen inside the walls of homes.

In *The Crossing*, the parents' decisions are the reason for the children's dangerous escape journey because they have decided to help smuggle two Jewish children to Sweden during the Second World War. The story is about reuniting families and the film reinforces the idea of a happy childhood, as both families are reunited at the end, and the war is left in the background. Reunion also happens in *My Brother Chases Dinosaurs*, when Jack realises the importance of family and the family forgives him.

The YAA films reinforce Brown's (2017, p. 13) observation that strengthening family ties is a broad and recurring theme in children's and youth films. From the central role of the family, it can be concluded that these films balance between the categories of children's and youth films. The main characters still live at home and are dependent on their parents in many ways.

The YAA films mainly tell everyday stories about young people's lives and, thus, do not offer escapism from daily issues. The *Invisible Boy*, *Zigzag Kid* and *The Crossing* are the most adventurous, but the first has a strong dystopian undertone and the second is melancholy because of the mother's death. The children's point of view brings a sense of adventure to the escape depicted in *The Crossing*, but the presence of the war is continuously felt.

Thematically, the YAA films are united by a focus on socially relevant and current topics that affect young people. Although the themes are serious, the stories always end on a hopeful note. Even *Animal* ends with images of a beautiful coastline in Costa Rica, where the protagonists have witnessed an incredibly diverse rainforest ecosystem. According to Maire Messenger Davies (2005, p. 399), hopefulness differentiates children's drama from adults' drama: "this is what makes children's screen drama

morally and also structurally and aesthetically, different as a genre from much screen drama *about* children.” Brown (2017, p. 15) similarly observes that in children’s films, “endings are predominantly upbeat, emotionally uplifting, morally unambiguous and supportive of the social status quo.” The hopeful endings of some YAA films may feel forced, but in this respect, they are typical of children’s films (see Brown, 2022, pp. 145–166).

Form and Style

The YAA films vary widely in narrative and style. Soto-Sanfiel, Villegas-Simón and Angulo-Brunet (2021, p. 135) state that future research should explore which genres young Europeans prefer. This research on YAA films has limitations, but it suggests that most successful films in this competition have been contemporary realistic dramas with a rather straightforward style of expression. In this research, realistic drama means films that portray everyday life through narratives that are believable, not formulaic and leave some ambiguity. As can be seen from Table 7.1, eight of the 11 films are categorised as dramas by IMDb. Drama is a non-thematic and ahistorical umbrella category like children’s film, which makes it problematic: it encompasses such a wide variety of films that one may argue that it does not have much explanatory value. Drama does have some clear features, however, perhaps most importantly the emphasis on human relationships.

Both in the educational materials provided on the YAA website and in the IMDb, many of the films are given several genre categories. In Table 7.1, IMDb was used as reference for the genre categories because the pedagogical handouts have been available only since 2017, do not use commensurate genre categories and include unofficial subcategories, such as “culture clash drama” (*Wallay*), “coming of age film” (*My Brother Chases Dinosaurs*) or categories that are not genres at all, such as “screen adaptation” (*Goodbye Berlin*). In IMDb, drama occurs the most and for some films (*Kauwboy*, *Miss Impossible* and *Wallay*) it is the only category [Table 7.1].

The majority of the YAA films are fictional. Three documentaries have been nominated and one, *Animal*, has won the award. The nominations include four animated films, but none of these has won. The language most spoken in the films is Dutch, used in four films. Because Dutch is not spoken widely in Europe, this suggests that language is not a major

criterion when voting for the best film. One reason behind the success of the Dutch films can be the country’s strong children’s film policy (Bosma, 2019). In the decade to 2016, which saw three Dutch YAA winners, “25% of all Dutch releases were children’s films and 44% of all Netherlands cinema admissions were for Dutch children’s films” (Sakr & Steemers, 2021, p. 294). The second most common language is French, spoken in three films. According to the European Audiovisual Observatory (2022), in 2017–2021, France was the European country that produced the second largest number of feature films, so the strong position of French-language films is not surprising.

Previous research (Mitric, 2022) has indicated that young European audiences prefer films in which the characters speak either their mother tongue or English. Yet, the linguistic variety in the YAA films shows that young audiences may not be as linguistically selective as this research suggests. The data used here does not enable by-country comparison between jury members’ preferences. To strengthen the competitiveness of the European film industry in Europe, it is important that European young people are interested in watching linguistically and culturally diverse films.

Table 7.2 lists the total admissions of the award-winning films as reported in European Audiovisual Observatory’s Lumiere database. The graphs reveal that the YAA films’ distribution is limited to a small number of European countries and that their theatre admissions are mostly

Table 7.2 Total admissions for the award-winning films. The film that has the most admissions is highlighted

<i>YAA films</i>	<i>Total admissions in the EU & UK markets</i>	<i>Total admissions in Europe including non-EU and non-UK markets</i>
<i>Kauwboy</i>	139,866	142,460
<i>The Zigzag Kid</i>	44,502	44,522
<i>Regret!</i>	442,405	442,532
<i>The Invisible Boy</i>	779,385	779,434
<i>Miss Impossible</i>	103,981	103,981
<i>Goodbye Berlin</i>	1,041,333	1,087,224
<i>Wallay</i>	30,595	30,595
<i>Fight Girl</i>	33,753	34,606
<i>My Brother Chases</i>	485,539	485,548
<i>Dinosaurs</i>		
<i>The Crossing</i>	11,291	159,176
<i>Animal</i>	137,528	146,865

Source: Lumiere database.

domestic. In this regard, YAA films are no exception, as most European films have very limited distribution (European Commission, 2015, p. 23; Jones, 2024, p. 56). *Goodbye Berlin* has the most admissions, 1,087,224, of which 918,780 are domestic. *The Invisible Boy* has garnered the second most admissions, 779,434, of which 713,185 are domestic.

THE CHALLENGES AND POTENTIAL OF THE YAA IN ENGAGING YOUNG PEOPLE IN EUROPEAN CINEMA

According to the European Film Academy, the YAA is meant to engage young people “who are on the border to adolescence and puberty” and are still interested in films for young people but no longer care for children’s films (email correspondence with a representative of the European Film Academy Productions, March 23, 2023). Indeed, the 11 awarded films can be characterised as youth films.

Based on the analysis, the jury members seem to appreciate realistic dramas that have something substantial to say. All the winning films deal with social issues through a variety of characters, some through humour, but generally the films are characterised by seriousness. A look at the other YAA-nominated films supports this conclusion. This finding is consistent with Brown’s argument that there are two main trends in contemporary children’s cinema: “the increasingly unsentimentalised representation of difficult and perhaps traumatic issues and the reaffirmation of the politics of social and cultural diversity” (Brown, 2019, p. 227). This study also confirms Brown’s (2019, pp. 227–228) observation that contemporary children’s cinema narrates challenging themes in ways that make the films appealing to adult audiences too.

However, the success of dramas dealing with challenging social themes may seem surprising, given that mainstream films for children and young people tend to be action-packed adventures and because the earlier studies of young European audiences emphasised their preference for American films. The result is at least partly explained by the fact that the YAA competition has mainly offered young people dramas with European social themes. According to the competition’s rules, only films that have won awards at festivals are eligible for the competition. Such award-winning films tend to be arthouse rather than popular mainstream films favoured by the youth. Additionally, this study has some limitations. Because adult jury members are involved in the first phase of the selection and until 2018

selected the three nominated films without pre-selection, the winners do not solely represent the preferences of young people. However, there are no marked changes in the content or style of the nominated films in the history of the competition. As Brown (2017, p. 15) points out, children's films are a product of the adult world and therefore reflect what adults think that children ought to watch. This is a general problem when assessing young people's preferences through films.

Only a limited number of European 12–14-year-olds have participated in the YAA juries so far. This audience thus represents a small minority of European youth, although it is geographically representative. Except for the age range and the nationalities, other information about the juries was not available. Because there are no written statements justifying the choices, it is difficult to say what the young people appreciate most in these films. This study concludes only on the common characteristics of the films awarded by young juries based on the analysis of the films.

Even though the YAA is a youth film competition, it simultaneously includes educational aims—yet its educational potential is rather modest. One way of increasing the competitiveness of European youth films could be to develop the educational aspect. The pedagogical material on the EFA website could be developed into a film literacy programme that utilises the lessons learned from previous film literacy programmes created in European (see e.g., European Film Factory, 2023) and national projects (see e.g., Mitric, 2022 for the Danish initiative of Med Skolen i Biografen/School Cinema, JEF n.d. for Belgium and EFAD n.d.). A European-level film literacy programme could combine cultural and social aims: to increase young people's understanding of film as a form of expression, to raise awareness of European cinema and its heritage (see also Soto-Sanfiel et al., 2021) and to stimulate dialogue, empathy, a sense of belonging and participation in a European community.

Since 2024, the YAA has been a part of the European Film Club, an initiative of former YAA jury members, which the European Film Academy has been developing since 2020. The club already seeks to further the above aims. The YAA films are made available year-round through a platform for registered members. The Academy has also increased the age limit for participation in YAA by including 15–19-year-olds as members of the club (email correspondence with a representative of the European Film Academy Productions, 23 March and 13 April, 2023). An open-access research-based pedagogical programme could strengthen the platform further and benefit a wider range of students and teachers in formal

and informal education institutions who are not yet involved in the YAA awarding process.

Such a film literacy project requires that it is easier to view the films. Better access via video-on-demand platforms would increase their recognition and social and economic impact through wider audiences. The YAA films could also be made more accessible through multilingual subtitles and dubbing. In a positive future scenario, the EU would support the translation of subtitles for the YAA films, as it does with the LUX European Audience Film Award winners (see Lähdesmäki and Hiltunen in this volume).

Earlier research has shown that children are open to films coming from different countries as long as they find the content interesting (Flodin et al., 2024, p. 103), and that young people tend to watch films that are easily available on major platforms (Veenstra et al., 2022). Following this logic, the YAA films could also become more popular if they were more widely available. Furthermore, making public the recommendations of young people who voted in the YAA competition could increase interest in these films among their peers. Our study suggests that YAA-winners have not represented the film preferences of young people as honestly as they could, and this would be improved if young people were given even bigger responsibility in the awarding process. Nevertheless, the YAA winners provide insight into what young people like to watch and this information should be considered when films are produced for young audiences.

The YAA awarding process engages thousands of young people in a community of film enthusiasts every year and gives voice to young people arguing their film preferences. The YAA thus has great potential to advance European youth film and the notion of young people as an important audience segment and as (future) filmmakers. Better communication, promotion and continuous funding are likely to increase the YAA's impact on the EFI and its competitiveness in Europe and beyond.

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European Film, Cinephilia and Digital Development: Filmin as a Driver of Another Kind of Film Competitiveness

Laura Caballero Ruiz de Martín-Esteban

DEFINING THE COMPETITIVENESS OF EUROPEAN FILM INDUSTRIES IN THE DIGITAL ERA

Industrial competitiveness is typically associated with the positioning of a company or group relative to its competitors in economic terms. Financial capacity determines the competitiveness of a national film industry compared to other nations and can be measured according to internal factors, external demand, alliances and business rivalries (Howse & McLarney, 2006; Ranger, 2020). In the case of European film industry, its competitiveness is traditionally measured in comparison to Hollywood. It could therefore be suggested that the European film industry has historically faced certain challenges in competing with Hollywood, although the scale and nature of these obstacles are complex and contingent upon diverse institutional and structural contexts.

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This chapter proposes a more nuanced definition of cinematic competitiveness, aimed at reconsidering different potentials and value parameters for application to the European film industry. It argues that the scope of this new understanding of competitiveness is based on a balance between tradition and disruption. On the one hand, the cinematic tradition on which the European film industry is based is a set of cinematographic films, reception and evaluation practices. This is directly connected to European cinephilia, a specific cinematic culture that asserts its influence through the legacy of modern auteur cinema and film festivals. On the other hand, digital disruption allows for a more sustainable market and a closer relationship with audiences. In this regard, the emergence of Video-on-Demand platforms has, in principle, allowed for broader access to a more diverse cinema.

As a case study, this chapter traces the development of the Spanish platform Filmin, analysing its catalogue selection, editorial line and communication and audience engagement strategies. In particular, it considers initiatives such as the organisation of the Atlántida Film Fest (held annually in Palma de Mallorca since 2011) and the website The Filmin Times. Through these dynamics, Filmin emerges as an agent contributing to the revitalisation of European cinematic culture.

Before World War I, some national film industries in Europe, such as those of Italy and France, enjoyed relative market stability, exporting their productions outside the continent. However, this situation was reversed during the second decade of the twentieth century. The establishment of the studio system and the Motion Picture Association (MPA) solidified the global dominance of the US film industry during the following decades (Miller et al., 2005). Despite the artistic prestige achieved by European film industries since the rise of the New Waves in the mid-twentieth century, the influence of US productions has remained dominant in each of Europe's internal markets. This situation accelerated in the mid-1970s, when the development of television networks and cultural industries reduced cinema attendance. Consequently, Hollywood distribution became more aggressive and European national industries became increasingly fragile, relying more on public support and ideological and aesthetic differentiation (the brand of auteur cinema) to find their niche audience and market (Maule, 2008; Neale, 1981).

The advancement of mass culture in late capitalism during the turn of the century has reshaped the traditional cinematic model within the broader, transmediatised and ubiquitous audiovisual landscape. The social

and cultural practice implied by the traditional cinematic experience around the film theatre is now only one (minority) option among many others. This diversity is linked to the formats and forms of the content, financing and production models, distribution and consumption. In this regard, digitisation is one of the decisive developments of the past two decades. Digital distribution via the Internet, technological innovation and broadband expansion have led to new electronic systems that enable fast, mobile and easy transmission and accessibility of audiovisual content (Neira, 2020).

Termed an innovative disruptor (Green, 2023), one of the most significant developments in the digitisation of audiovisual content has been the advent of Video-on-Demand (VoD) platforms for online content selection and viewing. In 2012, the arrival of Netflix in Europe (followed by other significant operators) propelled its growth, expanding beyond on-demand television services and local platforms (European Audiovisual Observatory [EAO], 2015). Over the next decade, Europe experienced market development marked by increased demand for content, the proliferation of operators and the establishment of the subscription-based monthly model (SVoD) in contrast to the individual rentals or transactional model (TVoD).

The new digital market and establishment of on-demand services can create new opportunities for a more accessible, equitable distribution of audiovisual content, including European film. However, digital optimism is simultaneously tempered by other factors perpetuating a model that hinders accessibility. The current digital landscape has maintained the same balance within the market observed in previous decades. Currently, the European VoD market lacks solid transnational operators. Instead, it is characterised by significant fragmentation and limited cross-border availability of content (García Leiva, 2019). In contrast, the global content available in the catalogues of VoDs operating in Europe is predominantly of US origin. Whether it be the traditional *majors* or new platforms like Netflix, Amazon or Disney+, distribution channels remain dominated by US-based multinational companies. Additionally, users' apparent freedom of choice in accessing unlimited content is increasingly questioned due to these companies' processing of big data, algorithmisation and digital marketing. According to Thomas Elsaesser (2016, p. 223),

If there is change, it is above all in the form of new distribution and circulation opportunities, where digital cinema is a new delivery system, adding 'value' to the product as it percolates through the entertainment industries.

However, where digital transmission seems so far to have had relatively little effect on the product itself: we are still dealing with the big picture, the blockbuster movie.

In an increasingly competitive global market, independent productions, which the European industry has traditionally relied on, are challenging and tending towards marginalisation (Aranzubia, 2017).

On the other hand, European national and EU authorities have responded to the challenges of the new *streaming* technology. The support of these institutions for the European film industry has been crucial throughout its development. Public support for film production is not only promoted to boost the market but has also been conceived as a democratic duty insofar as these works represent Europe's identity and cultural diversity (Neale, 1981). Thus, a new regulatory framework has been created to allow new digital services to coexist with traditional operators (television, cinema, radio). The last modification of the Audiovisual Media Services Directive, which requires VoD services to include a percentage of European production in their catalogue and to finance works produced and distributed by independent players, accentuates the goal of preserving cultural diversity and balancing the market (García Leiva & Albornoz, 2021).

Additionally, the EU promotes more active initiatives to stimulate European film production. One of the most prominent is the MEDIA programme of Creative Europe, which has been financing audiovisual projects since 1991 to encourage cooperation and energise the market. Since 2007, the MEDIA programme has introduced measures for VoD platforms for the digital development of business projects or international distribution (MEDIA Office Spain, n.d.).

The creation of the MEDIA programme was intended to counteract the liberalisation of the audiovisual market resulting from the TVWF directive (1989). In other words, EU authorities understood that protecting European cinema's cultural and linguistic diversity was as crucial as promoting its competitiveness. Thus, the concept of film competitiveness may be included and reinterpreted in the context of European cultural standards. In this sense, the competitiveness of the European film industry revolves not just around competing with Hollywood but also around the operation of a dynamic, diverse and balanced internal market. This market would facilitate the dissemination of works with value, not only economically (to maintain an independent and healthy market), but also culturally

(to represent diverse social identities and aspire to artistic experimentation).

THE EUROPEAN FILM COMPETITIVENESS THROUGH THE TRADITION OF 'CINEPHILIA'

It is possible to form another definition of competitiveness by drawing from the rich tradition of European cinema. Allusively, the competitiveness of films leads us to a central space for European cinema: the international film festival. When films compete in the official sections of international festivals, a dynamic is generated that transcends awards. For a few weeks (strategically distributed throughout the year), the festival creates a landscape where European cinema takes centre stage in the public agenda, recontextualised by the added cultural value generated by the festival event (de Valck, 2007). As Harbord (2002, p. 73) states,

Festivals in Europe remain committed to a range of activities and purposes; in addition to marketing and evaluating film are the components of training, education and a commitment to cultural diversity [...] [T]he nation as a competitively positioned unit within the market for creative industries, acquires symbolic capital from the festivals within its borders.

Festivals organise and mobilise films within the European market. The growth of festivals, their planning throughout the year, the increasing specialisation of programming and their growing public popularity contribute to a more dynamic market (Elsaesser, 2005a).

In this way, film festivals establish a transnational network connecting films, creators, curators, managers and audiences across Europe. The processes that are initiated and channelled at festivals, especially at their competitive sessions, enable the implementation of advertising, financing and promotional strategies for the flow and cohesion in the European market (Harbord, 2002). In other words, competitiveness, in this sense, involves creating an internally competent ecosystem that energises a cultural circuit through which a broad and varied production is sustainably organised and disseminated, reaching diverse European audiences.

This understanding of competitiveness within the European market through film festivals also connects with the practices of cinephilia. Cinephilia is a sign traditionally associated with European film culture (Baecque, 2004; Elsaesser, 2005b; Pujol Ozonas, 2014). Initially linked

to a specific historical framework (Post-war Paris and the *Cahiers du Cinéma* critique), cinephilia has evolved to transcend its original context, signifying a way of experiencing cinema and a mode of engaging with it (Hagener & de Valck, 2008; Keller, 2020; Ramos, 2021; Vidal, 2017). Despite changes in the medium, cinephile culture has maintained its cultural specificities, such as an effective and intimate predisposition towards cinema, participative forms of knowledge exchange or the construction of a canon of specific auteurs. Regarding its spaces, in addition to festivals, the communal viewing practice in the cinemas persists as an ideal form of reception. However, the online virtual space is generating debates within cinephilia.

An example of the direction of these debates is the conflict involving the Cannes Film Festival and Netflix since 2018, where the official festival organisation prohibited the competition of films produced by the VoD company that had not been previously screened in theatres (Gleiberman, 2018). Nevertheless, online platforms can also offer good opportunities to disseminate European films and associated cultural values. This is evident in the case of the Spanish VoD platform Filmin, which promotes European cinema by adapting cinephile culture practices, fostering a shared sense around it and encouraging participatory experiences, including festival attendance.

FILMIN, MARKETING AND CINEPHILIA

Filmin (Films Newco S.L.) was established in 2007 by the independent film distributor Cameo, founded in 2003 by Juan Carlos Tous and José Antonio de Luna, together with Jaume Ripoll. During those years, commercial initiatives venturing into digital distribution in Spain were tentative and the challenges faced were evident. Firstly, piracy diminished revenue and projected the idea of legal online commercialisation as unfeasible. Subsequently, there were reservations from the exhibition sector, viewing this digital approach as unfair competition. They had the support of a strict exploitation screening policy set by law, requiring VoD platforms to wait several months before including premieres (Clares-Gavilán & Medina Cambrón, 2018). In the background, the effect of an economic crisis reduced viewers' spending capacity and public support for cultural industries (Clares-Gavilán, 2014).

Filmin took off in these adverse conditions but consolidated its position against other emerging platforms that lasted only a short time. For

example, between 2007 and 2011, platforms like Filmotech, Youzee, Cineclick, Yomvi or Wuaki.tv were born in Spain. By 2015, all of these had either been absorbed by competitors or ceased their activity (except Filmotech, which ceased in 2019). This underlines the contextual challenges mentioned earlier and the uniqueness of Filmin's case. To understand its success, it is important to consider its business model and offer. The background of the company's founding partners is crucial in this regard. Their position within the industry provided them with proprietary content, contacts and strategic knowledge. Filmin initially enriched its catalogue with films for which Cameo held distribution rights. Additionally, it attracted films from other Cameo partners, such as Golem, Tornasol, Wanda, El Deseo and Continental, as well as from other independent distributors, *Vértigo* and *Avalon* (Medina, 2020).

Alongside its content, developing an original, flexible and audience-adapted business model was another factor that facilitated the platform's positioning. Like most platforms, they first embraced the transactional model and conducted *day-and-date* releases. The first case was *Tiro en la Cabeza* (Jaime Rosales, 2011). However, their strategy for simultaneously releasing the film *Carmina o revienta* (Paco León, 2012) in theatres, VoD, DVD and pay TV proved highly successful. The film grossed 664,000€ (with production costs of 100.000€) and was viewed by 79,531 spectators (Clares-Gavilán, 2014). This demonstrated that legal *streaming* was a viable option and that the internet was an avenue for exploring and connecting with a broader and more diverse audience. Finally, in 2010, Filmin introduced the option for a monthly subscription, which could be combined with individual rentals. It was the first platform in Spain (and the second in Europe) to embrace the model of monthly subscription, which would eventually become popular among users (EAO, 2015).

Lastly, developing an independent film platform in an adverse context can only be understood through the financial support provided by the MEDIA programme. Since 2008, Filmin has consistently been selected within the programme's calls to foster the development of European VoD platforms and digital distribution (Creative Europe [EC], 2021).

Content targeted towards a niche market, a popular business model and financial support from MEDIA explains Filmin's takeoff in 2008 when the Spanish streaming market was still emerging. It was from 2015 onwards, with the arrival of major international platforms like Netflix, HBO and Amazon Prime, which promoted the establishment of the VoD market in Spain. This process was also aided by the fact that the leading

national telecommunications operators, Movistar and Vodafone, following business mergers, either developed their own platforms or partnered with existing ones (Clares-Gavilán et al., 2019). In recent years, two events have marked the evolution of the VoD market in Spain. One was the pandemic in 2019 and the other the arrival of new international platforms powered by US *majors*, such as Disney, in 2020. The effect of these events has been somewhat discordant. While subscriptions to platforms initially proliferated and the market expanded even further, the emergence of new players is leading to what some authors describe as market saturation (Neira, 2020).

For Filmin, the emergence of a more structured market has meant facing increased competition but also the opportunity presented by a growing potential audience. In recent years, the platform has solidified its position, with a relatively small but stable and significant overall market share given its niche offering. In 2022, it was the only platform in Spain that maintained its number of subscribers while others (including major international operators) declined (Audiovisual 451, n.d.). To achieve this, Filmin has implemented new strategies. It has expanded its business scope and, since 2021, produces its content (also as a result of the European Directive). In December of that same year, two venture capital funds (Nazca and Seaya) became the company's leading investors (Otero, 2021).

Digital marketing strategies, capitalisation and the business model have enabled the company to strengthen its position in the market. However, for its potential audiences, the factors that differentiate Filmin from other platforms are others: its offer of independent, classic and European cinema; beyond the what (a specific offering), it is asserted here that Filmin's distinctiveness is provided by *how* it presents its films to the audience. In this regard, the Filmin team has engaged in a cinephile-rooted memory and practice.

Indeed, Filmin can be seen as the outcome of a group of cinephiles turned entrepreneurs. Juan Carlos Tous and José Antonio de Luna had worked together at Manga Films since 1993, a distributor of independent cinema in Spain. Jaume Ripoll had studied Directing at the *Escuela Superior de Cine y Audiovisuales de Cataluña* [Superior School of Cinema and Audiovisuals of Catalonia] but considered the video shop run by his family as his proper training ground (Ripoll, 2023). When all three worked at Cameo, their priority remained "customer advice [based on] the last film that had excited them" (Echarri, June 01, 2023). In the same way, they conceived Filmin as an "internet portal where people who live 'of,'

‘for,’ and ‘by’ cinema; where the film lover; where someone who wants cinema to be their home, finds a series of contents at their disposal” (Tous in *El Séptimo Arte*, n.d.).

Bringing cinema at home for those for whom cinema is their home is the purpose of a VoD platform like Filmin. Herein lies its essential difference. The canon of European cinephilia is reimagined within the digital technology framework to make it more accessible to the public and to adapt it to the new global and competitive market. In the case of Filmin, the internet becomes the space where four actions associated with cinephilia tradition come into play: curation, dialogue and exchange, organising festivals and the recreation of the European identity.

“THE BEST ALGORITHM OF FILMIN IS ITS CURATORIAL TEAM”

Filmin catalogue’s content foundation broadly shares the cinephile canon matrix, classic Hollywood cinema and modern European cinema. This extends to include recent American and European independent and auteur cinema. It constitutes a wide variety of films characterised by different modes of production, geographical origins and styles but grouped and stabilised under the umbrella of Arthouse cinema (Neale, 1981). Various discourses contribute to constructing and imbuing meaning to this common category of Arthouse cinema, including those articulated by cinephiles (from anonymous cinephile audiences to specialised critics). Through carefully selecting and appreciating works, a skill set and intellectual background are put into practice (Jullier & Leveratto, 2012). Filmin reproduces and generates these operations through a meticulously designed catalogue.

Filmin has positioned content curation as its distinctive feature, setting it apart from other platforms with more generalist search engines and presentation frameworks (genres, most-watched films, premieres or algorithmic recommendations). Filmin organises its extensive catalogue of over 15,000 works via two tools: collections and thematic channels. The former presents a more uncomplicated grouping of works, ranging from 20 to 90. The channels represent a more elaborate selection, with thematic subsections, updates and, in some cases, collaborations with external institutions (e.g., the “*Filmoteca Española*” [Spanish National Archives] channel). This selection method involves knowledge that may refer to the

history of cinema (e.g., the “*Nouvelle Vague*” channel) and public agenda topics (e.g., the “Mental Health” collection), or reflects the personal preferences of the editorial team (e.g., the “[Movies that] you love or hate: They provoke everything except indifference” collection). Filmin also creates personalised collections based on the tastes of specific personalities (e.g., “Favorites of ... Susan Sontag”; “... Agnes Varda”; “... Ari Aster”) and has a personalised recommender, a search engine based on a test-like question format (“What do you feel like watching?”; “From which era?”; “How dense?”). Implicitly, Filmin’s curation manifests a typical cinephile opposition to mainstream and market-imposed consumption (Jullier & Leveratto, 2012), as represented by the algorithmic logic of other platforms.

Along with the selection of specific films, the way Filmin presents them completes its curation work (Rodríguez Ortega & Fernandez-Meneses, 2024). Various paratextual elements have been incorporated around the films in the catalogue, contributing to a cinephile viewing experience. One of these elements is subtitles, which make it possible to view content in its original version, reinforcing one of the hallmarks of European cinema: linguistic diversity. Additionally, the design of film posters for specific collections updates the aesthetic sense of the works. For instance, the posters designed for Ozu’s filmography collection recall the ink wash painting technique in traditional Japanese art. Similarly, the posters for Seijun Suzuki feature a vibrant colour collage and kitsch aesthetics, aligning with the director’s pop style.

All of this represents a more direct and active approach to the users-audience. It aims to capture the attention of an audience that, a priori, has more specific selection demands. This does not necessarily imply higher demands regarding quality. The variety and breadth of topics (66 channels and 421 collections) allow for a more diverse approach to the audience, ranging from a traditional cinephile profile based on auteurs or cinematic styles to an audience approaching works through suggested themes. Furthermore, the content is becoming increasingly diverse. This obliges us to question the initial idea: a cinephile canon based on classic and modern auteurs. Since the 1970s, cinephilia (also known since then as fandom or cinemania) has adapted and expanded its typical canon to accommodate very diverse works but experienced with similar intense passion (Pujol Ozonas, 2014). In Filmin, works that could be considered heterodox from the classical cinephile paradigm find a place in the catalogue with the same curatorial charisma. This is evident in collections like “Giallo” or

“80’s Nostalgia”. The most symbolic case of this broadening of taste was the inclusion in the catalogue of the successful and mainstream comedy *Torrente, el brazo tonto de la ley* [Torrente, the Dumb Arm of the Law] (Santiago Segura, 1998), whose protagonist embodies the stereotype of a misogynistic, corrupt and racist police officer. The reactions and debates it sparked among the audience connected with the next cinephile practice enacted by Filmin, the promotion of exchange and dialogue as a way of creating community.

BUILDING VIRTUAL CONNECTIONS

On May 27, 2020, when Filmin announced via its Twitter account that it would add the *Torrente* saga to its catalogue, responses from their followers were immediate (Filmin, 2020). The announcement sparked 111 user comments, ranging from those celebrating the inclusion to those supporting it with little enthusiasm, others threatening to unsubscribe and those engaging in conversations with fellow users. With the decision, Filmin achieved a less obvious goal. It was not about expanding, subverting or degrading the cinephile canon; instead, it aimed to generate a debate, encouraging users to express their philias and phobias.

For cinephiles, sharing and discussing films are generative aspects of their identity, defining them as a distinct community (Pujol Ozonas, 2014). Debating and exchanging thoughts about movies bring pleasure and help identify shared interests with others (Jullier & Leveratto, 2012). Cinephiles have historically found physical and virtual spaces for such discussions, including cinemas, cafes, newspapers and reader letters. However, the advent of digital media has significantly transformed these relationships. Internet connectivity has created a geographically and socially broader cinephile network (although, as stated, various sociocultural restrictions still affect Internet access). Through chats, blogs, websites or social media platforms, cinephiles access information and communicate with each other. When the subject of interest is films, the passion and attention characterising cinephilic debates shift to a broader and more diffuse space. This creates a kind of “global intimacy”, revitalising and diversifying the cinephile community (Behil, 2005).

Moreover, online spaces have enabled users to play a more active and productive role as prosumers (Jenkins, 1992). This aspect is also leveraged by content creators and managers, such as Filmin, to foster more direct engagement and relationships. Filmin has created various spaces for user

communication. Social media accounts facilitate dynamic communication. Filmin's blog (Filmin, [n.d.-a](#)) serves as a platform for joining reflections on various topics (festivals, reviews, lists, film productions, etc.) and users can comment. Lastly, the users-audience can interact by rating works and publishing lists on their platform profiles. User ratings and the category of the most highly rated films occupy a visible space on the platform. Therefore, this action allows the community actively to participate in the curation content of the catalogue as well.

ATLANTIDA FILM FEST: A FESTIVAL FOR A CONTINENT

The international film festival serves as a crucial space to foster the competitiveness of national film industries, generate cultural capital and interconnect and activate European cinema and its market. Additionally, the festival acts as a space for cinephile sociability. It embraces the classical ritual of collectively watching films on the big screen over multiple sessions. The exceptional nature of the event provides an opportunity for a more intense and immersive emotional reception, offering an "economy of experience" tied to the tourism and cultural spectacle aspect that festivals have acquired (de Valck, [2007](#)). These opportunities materialise in the Atlantida Film Fest (AFF), organised by Filmin since 2011 and based in Palma de Mallorca, with support from the MEDIA programme.

AFF was the first online film festival in Spain. During its initial years, a selection of unreleased films could be viewed on the platform for a month. The programming followed the logic of a traditional festival, with various sections and in competitive sections, the prize aimed to facilitate the commercialisation of the winning films (funding their theatrical release, subtitling, launching the DVD internationally, etc.). Starting in 2016, AFF adopted a hybrid format and chose Palma de Mallorca as its physical venue. Alongside screenings, the physical venue organises activities related to the films, mainly concerts and conferences. The programming has gained significance, specialising in European cinema and thematising around the notion of "Europe" (Filmin, [2018](#)). This way, from a broad concept, a unity programme is achieved for a widely varied cinema with diverse origins, referring to a common ideal.

The programming of AFF focuses on two objectives: providing visibility to digitally distributed cinema and enhancing the prestige of online screening (Filmin, [n.d.-b](#)). Though VoD platforms have facilitated cross-border and economic circulation, the breadth of offerings often causes

many films to go unnoticed, failing to reach their audience. Therefore, the challenge remains in creating adequate circulation and promotion strategies that organise films and connect them with the audience. In this regard, the importance of the cultural circuit no longer lies solely in the technological access structure provided by the theatre screen, but in its ability to make visible and attractive a cinema that would otherwise go unnoticed (Loist, 2023). Festivals increasingly assume this role and Filmin works along these lines. During AFF, by showing films on the big screen, carefully arranging them in the schedule or contextualising them with activities, a focal point of interest is generated, extending into their subsequent online circulation. In addition to programming and activities, the festival also opens spaces for educational workshops, industry networking and benefits from the city's allure (Mallorca is a significant tourist venue during the summer season). All of this positions the AFF within the network of European festivals that invigorate the continent's cinema.

WEAVING EUROPE THROUGH ITS HISTORY

Since the New Waves, European cinema has reproduced a shared past (around a specific canon of films) that endows it with prestige and identity (Elsaesser, 2005b). With this cinematic genealogy, films produced in present-day Europe find an anchoring point and organic meaning. However, this common European ideal clashes with the internal rules of the film market, where *geoblocking* and *copyright* protection provide a rational and competitive framework. Therefore, simultaneous strategies that appeal to the unity of the cinema tradition while respecting geographical borders in managing film content are necessary. Filmin has contributed to this dual effort through various projects, such as the Eurovod network and The Filmin Times website.

Established in 2010 through the initiative of Filmin and the French platform UniversCiné, Eurovod is a collaborative network among independent European platforms specialising in European, independent and Arthouse cinema. As of 2019, Eurovod comprises 24 members representing 18 countries across the continent (Briel, 2019, May 23). The network aims to promote the transnational circulation of European films, information and other resources. By jointly managing rights licensing, the aim is to make the same films available on most partner platforms. As of 2021, more than 1000 films were shared through Eurovod. Around 76% of European films included in the catalogues of association members are

shared (Briel, 2019, May 23). The initiative seeks to address one of the inherent limitations of the European film market: fragmentation. Therefore, Eurovod breaks down barriers between markets and audiences, facilitating a greater flow of content. This way, linguistic and cultural diversity is maintained but in a more open and interconnected manner. The network has increased the transborder availability of films from 16.8% in 2015 to a share ranging from 36% to 56% (depending on their previous cinema release) in 2021 (Alaveras et al., 2015; EAO, 2021).

The collaborative management of film rights across borders has expanded the cinematic content available to European viewers. In addition, new measurement forms between audiences and films should be implemented for a real approach. With this purpose, The Filmin Times (Filmin, n.d.-c), a web platform that compiles information about the contemporary history of Europe over the last 150 years, was launched in 2020. The website presents the continent's history through maps, timelines, specific events and notable figures. The content is delivered through images, text entries and films, which, in turn, link to the Filmin catalogue. In this sense, the films in The Filmin Times serve an illustrative and educational purpose. Furthermore, the platform constructs a historical narrative beyond political and military perspectives, opening up to new cultural, social and transnational narratives.

CONCLUSIONS: REDEFINING THE COMPETITIVENESS OF EUROPEAN CINEMA AROUND CINEPHILIA AND DIGITISATION

The reflections presented in these pages aim to challenge the principle of competitiveness as applied to the European film industry. Traditionally, competitiveness in cinema has been interpreted as the global positioning of the film industry in economic and financial terms. However, the European film landscape reveals a more complex scenario. European cinema represents cultural diversity, a common heritage and an industrial landscape of numerous modest-sized players. This sector has established a space for circulation and promotion that accompanies films, contextualising them through festivals, discourses and audiences. It is a management approach that activates the circulation of films, seeking sustainable and equitable commercial development while balancing this with cultural appreciation. This sense of competitiveness, more culturally oriented, is

intrinsic to the identity of European cinema and draws from cinephile tradition.

Over time, European film has faced increasing economic competition within a more diverse and globalised audiovisual landscape. The digital era has revealed a complex scenario marked by challenges and opportunities. Digital technology, especially the proliferation of VoD platforms, could facilitate seemingly more efficient distribution, but international platforms (especially the US ones) continue to represent dominant competitors. National and European authorities have responded with measures to ensure a dynamic, plural and accessible digital market. Programmes, such as MEDIA of Creative Europe, have sought to support the consolidation of a European digital market. In this context, platforms such as Filmin have emerged as players adopting flexible and audience-oriented business models.

Filmin exemplifies a successful model for the creation of a VoD platform that updates the knowledge and practices traditionally associated with cinephile culture, adapting them to the new digital landscape. Its cinephile identity has proven useful in differentiating the platform and attracting an audience with interests and sensibilities aligned with this form of cinematic culture. Some of its strategies are content selection and editing, mediation and participation methods, collective and eventual reception practices (linked to festivals) and the recreation of common European culture. Through them, Filmin promotes the transnational circulation of European films and continues to spread and expand cinephile film culture.

Ultimately, the redefinition of European film's competitiveness does not imply competing against Hollywood but rather building a dynamic and balanced market. Connection with cinephile tradition, the promotion of film festivals and collaboration between platforms emerge as key avenues to strengthen access to and the diversity of European cinema in the digital era.

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Creativity and Competitiveness in Film Music Composition

Jean-François Trubert and Julie Mansion-Vaquié

INTRODUCTION

Original music is not merely a functional or supportive element within a film. Rather, it constitutes a core component of filmic expressive identity and contributes significantly to what is often referred to as the film's production value (Neuwirth in Ward, 2008, pp. 241–242; Zhuang, 2023). By shaping narrative tension, emotional texture, and cultural specificity, original scores enhance the distinctiveness of European audiovisual works in a global market increasingly dominated by standardised soundtracks and library cues. Today, music is fully embedded in the audiovisual production pipeline, spanning every stage from early creative dialogue with directors to final delivery, editing, and mixing. Competitiveness of AV works and film in this context extends beyond questions around cost efficiency to encompass production timelines, workflow optimisation, and the ability to deliver artistically compelling results under tight constraints. Recent reports by the European Composer and Songwriter Alliance

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(ECSA, 2023) underscore the urgent need to reassess the working conditions of audiovisual composers, particularly in view of increasingly precarious contractual models and the rapid integration of artificial intelligence into the music production process. As such, musical creation plays a dual role: it is both a site of artistic innovation *and* a strategic asset in the competitive positioning of film productions. Original music also remains a distinctive marker of a film's identity and uniqueness, especially in an increasingly saturated media environment.

In a context where content proliferation often leads to aesthetic homogenisation, a carefully crafted score can function as a symbolic token of differentiation—a “shadow asset” of competitiveness that reinforces both narrative depth and brand memorability. This chapter adopts the hypothesis that understanding the process of the composition of original music for film as a structured workflow, rather than an opaque or purely intuitive act, offers valuable insights into the industrial dynamics of creativity. By modelling the compositional process as a reproducible sequence of creative and technical phases, production teams are better equipped to anticipate costs, schedule resources, and plan recording sessions with greater accuracy—ensuring that musical quality is delivered efficiently and aligns with both artistic goals and industrial constraints. Exploring the process also illuminates the emerging professional landscape for young composers, who must now navigate highly technological, fast-paced, and economically demanding environments. As Hesmondhalgh (2013) argues, in cultural industries increasingly driven by logics of flexibility, speed, and risk management, the capacity to articulate and manage such creative workflows becomes a key determinant of economic viability and professional sustainability. This clarity around music workflows reduces economic uncertainty and supports more sustainable planning practices. These findings underline the potential of music workflows—when formalised and optimised—to act as levers for improving competitiveness and creative efficiency, especially in the context of constrained audiovisual productions across the European landscape.

In order to address these points, this chapter begins with a brief literature review on the creative process in screen music composition. The creative act of composing original music for screen is rarely examined as part of an identifiable and structured workflow. Instead, it is often treated as an opaque or purely intuitive process. It is precisely this production process that we aim to investigate. The following section outlines the research methodology, the panel of composers consulted, and the key elements

retained in constructing the survey. This empirical observation, combined with a practice-based investigation—including semi-structured interviews and the recording of actual work sessions—reveals a series of recurring patterns within the music production chain. The identification of these structural constants is essential for understanding how workflow design contributes to competitiveness in contemporary screen music production. The results are then presented, offering insights into the composer–production relationship, technical choices, and funding issues. A final case study details the production of an original orchestral soundtrack.

CREATIVE PROCESS IN THE FILM MUSIC INDUSTRY

In classical and contemporary music, genetic criticism and analytical methodologies for studying creative processes are well established (Donin, 2018; Cook, 2018). These often rely on textual and paratextual sources (cf. Genette, in Trubert, 2008). However, such approaches are seldom applied to film music in its industrial context—particularly when it comes to digital production and editing environments. Since the *Nouvelle Vague*, French law has recognised the composer as one of the authors of an audiovisual work. The French Intellectual Property Law of March 11, 1957, was the first to legally designate the composer of a film’s music as one of the five presumed co-authors of the film, alongside the screenwriter, the adapter, the author of the spoken text, and the director. This legal recognition paralleled the increasing cultural visibility of composers in cinema—for instance, their inclusion on the Cannes Film Festival jury (Georges van Parys in 1952, Maurice Leroux in 1960), Georges Auric’s presidency at SACEM, and the establishment of a chair in film composition at the IDHEC under Yves Baudrier’s initiative. Yet, despite this institutional legitimacy, the music production process has remained shrouded in mystique, often romanticised through emblematic creative partnerships (Williams–Spielberg, Zimmer–Nolan, Morricone–Leone). Prior studies have explored creative processes in film music (Hellégouarch, 2020). They often focus on high-profile director-composer partnerships with privileged working conditions.

Scholarly literature on film music can be broadly categorised into the following strands: historical narratives (Cooke, 2008; Wierzbicki, 2009), analytical approaches often oriented by genre or technique (Bartkowiak, 2009; Kalinak, 2010; Audissino, 2017), aesthetic and analytical approaches (Cooke & Ford, 2016; Mera et al., 2017 but also Lehman, 2024), and

practical guides to composition (Kompanek, 2010; Schiffrin, 2011). These works primarily frame music as an expressive or semiotic medium—focusing on its aesthetic qualities, emotional functions, or symbolic meanings within the narrative. Fewer studies have examined the ways in which composers operate within increasingly standardised and digitised production environments. As a result, they tend to sideline the economic and organisational dimensions of music production, treating composition as an artistic outcome rather than a structured, industrial process. Consequently, the question of how music contributes to the competitiveness of screen productions—through workflow efficiency, technological mediation, and economic viability—remains underexplored. Furthermore, relatively few studies investigate the compositional process within its industrial context—particularly in relation to workflows, production constraints, and economic pressures (Smith, 2014). The following discussion addresses that gap by examining how musical ideas emerge not only from artistic vision but also from the conditions of production, digital tools, timeframes, and collaborative structures. As Saltzman (2015) has noted, the composition of music for visual media today entails an increasingly complex series of stages, each requiring a diverse set of creative and technical competencies.

As Théberge (1997) and later Prior (2008) argued, technologies of music production do not passively serve artistic vision; they structure the ways in which musical ideas are generated, transformed, and made intelligible within industrial logics. This appears particularly clearly in the last work done by Sergi Casanelles (2024) where he clearly demonstrates how composers are nowadays building what he calls “hyperorchestra,” or even in the more recently published book from the IRCAM Center in France related to AI and its usage in different forms of Arts (Giavitto & Saint-Germier, 2025). In the context of screen media, mastering these tools enables composers to meet formatting norms, comply with delivery standards, and participate effectively in transnational workflows—all of which are prerequisites for economic inclusion in competitive audiovisual markets. It is for this reason that we give equal weight to the analysis of creative decisions and to the practical infrastructures that support them. Although the mixing phase is often delegated to audio professionals when budgets allow, many composers—especially students or freelancers—undertake this task themselves. The delivery stage, typically involving multitrack stem files, reflects the increasing standardisation and professionalisation of music workflows. The use of AI is not really involved

during this process for two reasons. The first reason concerns the nature of the sound generated, the second is about the constraints: recently Netflix gave in its guide to creators the instruction to clearly not use IA into the composition score (Interview with Sacha Chaban, 2025).

Live recording remains an important, though budget-dependent, aspect of many workflows. The inclusion of live-recorded music enhances the “production value” of a film by adding depth, nuance, and a sense of realism to the soundtrack. As noted by Cooke (2008), live orchestral recording contributes substantially to a film’s emotional resonance and prestige, playing a central role in its perceived production value and industrial competitiveness. This vitality—difficult to replicate with virtual instruments alone—plays a significant role in shaping the emotional and aesthetic reception of the audiovisual experience, while also reinforcing the market appeal and competitive standing of the final product. As Holmes (2012) argues, the inclusion of live-recorded elements, as opposed to fully synthesised tracks, adds perceptual realism and dynamic range to a soundtrack, thereby enhancing both its narrative impact and marketability. Beyond the technical dimension, the economic context in which these workflows unfold is equally critical. Music represents a distinct investment within the overall film production process and contributes directly to what is widely referred to as a film’s *production value*. As such, original scoring is not only a cultural asset but a vector of strategic differentiation—particularly for European productions operating under tighter constraints and seeking to preserve artistic uniqueness in a global media landscape.

Building on work on creative labour (Hesmondhalgh & Baker, 2011) and production cultures (Caldwell, 2008, p. 150), this chapter investigates the ways in which European screen composers aim to balance artistic integrity with the demands of efficiency, collaboration, and delivery. In doing so, it argues that understanding how composers navigate these constraints is crucial to assessing the competitive positioning of European audiovisual productions in a globalised media landscape, where speed, adaptability, and originality have become key indicators of industrial viability. Our approach foregrounds the perspective of emerging composers and typical production environments. Mastery of the music workflow and its associated value chain is essential to ensuring that the soundtrack can be seamlessly integrated into the audiovisual production process, from initial mockups to final post-production delivery. At each stage of this workflow, composers must deploy not only technical and digital competencies—such as fluency with digital audio workstations (DAWs),

Virtual Studio Technology (VST), and Musical Instrument Digital Interface (MIDI) protocols—but also artistic expertise, including the ability to craft original sonic identities through novel orchestrations, harmonies, and melodic ideas.

In this context, we adopt a dual analytical focus. On the one hand, we investigate how composers adapt their workflows to respond to economic and temporal constraints while maintaining artistic quality. On the other hand, we examine how these adaptations reflect broader transformations in creative labour and industrial expectations. This approach situates film music not only as a cultural artefact but as a form of productive infrastructure—a domain in which creativity, efficiency, and economic viability intersect.

Our aim is to understand how the traditional stages of music composition interface with the requirements of film production. Composers are often responsible not only for the creative aspects but also for score preparation, editing, mixing, and post-production. They develop their stylistic identity through the choice of software, virtual instruments, and workflows. As Adam Patrick Bell (2018) emphasises in *Dawn of the DAW*, digital audio workstations (DAWs) are more than tools—they are creative ecosystems that shape every phase of the process. Mastering these environments is crucial not just for artistic expression but also for ensuring competitiveness and industrial viability. Contemporary film scores increasingly blend classical orchestration with electronic textures and sound effects—reflecting both creative ambitions and technical imperatives. This hybrid approach has become common in high-profile productions such as the *Avengers* franchise, but also informs European approaches where resources may be more limited, requiring skilful integration of real and virtual instruments.

EXPLORING THE PROCESS OF MUSIC WORKFLOW

Building on this conceptual framing, our investigation turns to the actual tools and production contexts that shape the daily practices of screen composers. Whether for mixing, post-production, or initial compositional sketching, digital environments play a central role—particularly the Digital Audio Workstation (DAW), which serves as the compositional hub. Because much of the compositional and technical process is now mediated through traceable digital operations—file hierarchies, plugin chains, automation parameters, and session timelines—these environments render

previously opaque creative decisions observable and analysable. They enable a granular understanding of how composers allocate time, prioritise resources, and navigate constraints across the various phases of production. This reliance prompts a set of targeted inquiries: Which software environments are most commonly adopted? Which plugins are used at different stages of the workflow? How do budget constraints, stylistic considerations, and project timelines influence these choices?

To establish a standard model for music workflow in the field of film and media scoring, we employed a two-pronged methodology. First, a qualitative survey was conducted with a panel of young composers to gather data on compositional practices, technological preferences, and workflow structuring. To this end, we combine a qualitative survey of 19 emerging composers with an ethnographic observation of two professionals engaged in real-time composition projects. By analysing recurring stages, technological choices, and strategic adaptations within their creative workflows, the study contributes to a better understanding of the ways in which composers construct competitiveness—whether by optimising time management, negotiating creative autonomy, or tailoring their music to the aesthetic and economic expectations of contemporary screen production. The number of respondents was sufficient to observe recurring patterns and to stabilise key phases of the production process. Concerning the second, an ethnographic protocol was implemented with two selected composers (Vega, 2025; Chaban, 2025), who provided access to their working files, recorded their own screen and audio sessions during composition, and offered commentary on their processes. This immersive approach allowed us to document not only what composers do, but how they reflect on and adapt their practices in real-time.

Finally, to complement this composer-centred perspective, we video-documented a professional orchestral recording session for a documentary film. This allowed for a comparative analysis of recording workflows, focusing particularly on the efficiency and competitiveness of the FAMES Orchestra in the Republic of North Macedonia relative to the National Orchestra of Cannes.

The panel of respondents consisted of 19 composers: 10 professionals—including 1 internationally recognised AAA composer based in Los Angeles—and 9 students. The professional participants were recruited through collaborations with the FAMES orchestra (<https://fames-project.com>), which specialises in film music recordings. The gender imbalance was notable: only one professional woman and two female

students participated. This disparity mirrors broader industry trends. According to the CNC (Lacoue et al., 2023), in 2022, only 11% of screen music composers in France were women, and just 16% of those receiving authors' rights from SACEM were female. This figure fell to 7% for exclusively or predominantly French productions. The collective *Troisième Autrice*, founded by composer Julie Roué, seeks to address this gap by providing a supportive platform for women composers in audiovisual media (<https://collectiftroisiemeautrice.com/a-propos/>).

Our methodology combines an empirical and ethnographic approach. The survey itself, structured around thematic domains, was validated by professional composers. The questionnaire consisted of structured prompts across eight thematic clusters: (1) Phases of Composition, (2) Scenario Interpretation, (3) Inspiration and Early Drafts, (4) Thematic and Sonic Development, (5) Mockups and Feedback, (6) Mixing and Scoring, (7) Digital Recording and Post-production, and (8) Budget and Delivery. Each category addresses a key moment in the composition process and reflects different modes of professional practice. For example, the early stages ask composers how they discover and interpret a project—whether via script, storyboard, or rough cut—and how they translate that into musical intention. Subsequent questions investigate how composers use leitmotifs, musical tropes, or sonic experimentation to convey character, emotion, or narrative pacing. Further sections focus on the production of early mockups, detailing how choices of instrumentation, harmony, and rhythm evolve through feedback cycles with producers or directors. We also examine the back-and-forth dynamics of revisions, especially in relation to client expectations and budgetary constraints. These domains reflect the broad set of skills required by composers operating in today's audiovisual landscape. The questionnaire explored not only aesthetic dimensions but also concrete production issues: plugin preferences, orchestral versus synthesised sounds, deadline management, and negotiation strategies. These factors directly impact composers' economic sustainability and market competitiveness. The section on technological mediation, for instance, examines how DAWs, plugins, and notation software influence not just sonic aesthetics but also workflow efficiency—a key concern under buyout contracts or compressed timelines (Saltzman, 2015).

These case studies involved multiple data collection methods: video recordings of composition sessions, screen captures that document software use and editing techniques, and interviews that reflect on the creative process. Particularly revealing are the screen recordings, which show

cursor movements, track selections, plugin applications, and region editing—offering granular insight into workflow logic.

We investigate whether composers rely solely on DAWs and virtual instruments or also integrate real instrumentalists, and how they prepare scores using tools such as Sibelius or Dorico. These choices often reflect both artistic aims and financial realities. The survey and ethnographic documentation offer a multifaceted view of the composer's work, integrating creative, technological, and industrial perspectives. They lay the groundwork for identifying not only standardised phases of the music production workflow but also the strategic adaptations composers employ to meet the evolving demands of the European audiovisual sector.

The following section outlines the key phases of the workflow—Scenario Interpretation, Inspiration and Early Drafts, Thematic and Sonic Development, Mockups and Feedback, Mixing and Scoring, Digital Recording and Post-production—and presents the main findings. It is followed by a more detailed discussion of the strategic aspects involved in managing these stages.

MUSIC PRODUCTION CHAIN: FROM SCRIPT TO MIX

The present study focuses on French-language productions across various formats: documentary, animation, and fiction. But, regardless of genre, it is assumed that a relatively stable music production chain is consistently employed, according to some works like Casanelles (2024) or Mera et al. (2017).

Project Discovery and Initial Briefing, Scenario Interpretation

The first phase is the initial reception of the project—typically a script, a rough cut, animatics, or a production file. This entry point sets the stage for creative projection and helps the composer understand the narrative, emotional, and stylistic contours of the film. Among the composers surveyed, 16 indicated that engaging with the project materials marks the starting point of their workflow; of these, 5 (including 4 professionals) also include early discussions with the director.

When this second step is distinct, these discussions are essential for clarifying the intended role of music—number of cues, emotional tone, stylistic references (e.g., temp tracks), and the degree of creative freedom granted. One key purpose of this interaction is to gauge the extent of the

composer's agency in shaping the soundtrack, which often reflects deeper dynamics of trust and collaborative openness.

*Inspiration and Early Draft, Thematic and Sonic Developments,
Mockups and Feedback*

The next stage corresponding to the preparatory work can be divided for most composers into two sub-stages: a period of reflection, characterised by musical and sound research that can be likened to experimentation in the search for colours and timbres corresponding to the image or story, as well as harmonic or melodic musical reflections. This first period leads to the concretisation of musical ideas, excerpts, or compositions that are presented in small forms.

It is followed by the production of the first demo that allows to present the themes (melodies), orchestration ideas, colour, or harmonic language of the project and the sound specific to the film. It is mostly created using MIDI (Musical Instrument Digital Interface) environment (MIDI is a communication protocol and file format developed in the 1980s that enables different digital instruments to exchange data) with VSTs (Virtual Studio Technology) that simulate orchestral timbres to get a close idea of the final result before recording real instruments.

Once a first demo is shared, the production team—often the director or music supervisor—provides feedback. This fourth phase is crucial for alignment before the irreversible step of recording. It allows for adjustments and final refinements of motifs, structure, or sonic palette. Here, practical issues such as cue timing and synchronisation also come to the fore.

Score Preparation and Recording

Following this production stage comes the return of the production team, or more rarely the director, for validation. This allows them to go back over details before recording, an operation that no longer allows for modification after the fact. To prepare for recording, it is necessary to produce scores for all the instrumentalists involved.

The next stage involves recording with real instruments, budget permitting. To prepare for recording, it is necessary to produce scores for all the instrumentalists involved. This preparation takes into account the proposed orchestration (small ensemble, large orchestra, soloist) and follows

particular rules of writing that differ from the usual confections for greater efficiency during recording (such as indicating all accidentals on the score and not on the armature). These rules are assimilated by orchestras which specialise in recording film music, but not necessarily by all musicians. For score creation, some composers use the services of a copyist, who is responsible for entering the scores into a score-editing program (Sibelius or Finale) and editing the different parts according to the instrumentalists. Recording is a step that appears in the process but to varying degrees. This step is specific for 9 composers (7 students/2 professionals) and mixed with the production of scores for the others (11). However, in detail, we see that for those who consider this step as a separate entity, 3 indicate it as optional and budget-dependent and 1 mentions that instrument recordings are done at home. For those who do not differentiate between recording and score creation, 6 only consider scoring on software (Dorico, Sibelius) and 1 does not handle the recording even though they consider it a step.

This step is directly linked to the film's economic constraints. While some of the composers on our panel indicated that they could record certain instruments themselves, organising a professional orchestral session—even for a limited portion of the soundtrack—requires the budget to be allocated from the earliest stages of the project. These constraints not only affect the feasibility of live recording but also shape the broader creative process, determining whether parts are delegated to orchestrators or managed in-house, and whether the final product includes real instruments or synthesised mockups. As highlighted in ECSA's survey on working conditions for audiovisual composers (ECSA, 2023), the majority are expected to deliver full scores under tight deadlines and limited budgets, often within three weeks and under buyout contracts. In this context, the ability to navigate economic pressures while maintaining artistic quality becomes a key marker of competitiveness, particularly in the European audiovisual sector.

Editing, Mixing, Delivery, and Mastering

The penultimate stage is editing and mixing. While some composers perform these tasks themselves using advanced DAWs and specialised plugins, many projects delegate this phase to professional engineers. Among our panel, this division of labour depends heavily on the budget and the production's organisational structure. When composers are responsible for

mixing, they rely on plugin suites (e.g., iZotope, FabFilter, Waves) to balance frequencies, create space, and meet broadcast or cinematic standards. The final step is delivery. Composers typically provide stems—separated, mixed audio files for various musical layers (e.g., strings, percussion, electronic textures). These are aligned with other sound stems such as dialogue and effects. Mastering and final integration are usually handled by the post-production sound team. None of the composers surveyed reported being involved at this final mastering stage, indicating a clear boundary in the workflow.

CREATIVITY AND COMPETITIVENESS

In the musical production chain of an original soundtrack, there are real economic constraints, but also temporal and artistic ones that influence the creativity of composers. Composers today must respond to audiovisual production orders within extremely short timeframes. This results in a significant reduction of the so-called inspiration phase, in order to accelerate the essential stages of production, which include creating the soundtrack, editing, mixing, and delivering to the production. Compared to the situation inside Europe, and outside, in terms of competitiveness, mastering the workflow is essential to ensure short music composition and editing times, which enables fulfilling orders and securing new contracts. But paradoxically, as music also embodies the “cultural cues” of the image, especially in European productions (such as the documentary film *Notre-Dame de Paris*, broadcasted on the national channel), shortening the creation time can lead to qualitative losses. These losses will either be compensated for by the high level of skill and technical expertise of the composers (this is the case for at least 4 of them) or by outsourcing part of the workflow tasks, such as editing or even recording or final mixing (for some of them), or for large productions (in the USA) for orchestration or arrangement.

For instance, one composer from our panel reported having only five days to deliver a complete score for a short film, resulting in the exclusive use of MIDI mockups with no live instruments. Another participant described how a budget constraint prevented orchestral recording for a historical documentary, leading them to use a combination of pre-recorded loops and sampled instruments. By contrast, in higher-budget US productions such as *The Mandalorian* (Disney+), the composer Ludwig Göransson worked with a dedicated team of orchestrators and sound

designers, allowing for both creative innovation and timely delivery. These examples underscore how, depending on the production scale, composers either rely on their own technical versatility (at least four cases in our study), or delegate tasks such as orchestration, editing, and final mixing to ensure both quality and feasibility.

Our observations reveal that while certain plugins—such as those for orchestration, reverb, or mastering—are widely used, their selection and configuration vary according to both aesthetic intent and production pressure. The mastery of these tools affects not only the sonic identity of the score but also its production efficiency, *becoming a core component of what defines* a composer's competitiveness in the current market. This focus on technical infrastructures is not merely anecdotal: it responds to a wider recognition that tools such as DAWs, plugins, and audio processing chains actively shape the creative field, both in terms of sonic aesthetics and professional viability.

In this landscape, a detailed understanding of the compositional workflow increasingly requires screen composers to invest in competitive technological infrastructures. This includes high-performance computers, professional-grade DAWs, extensive libraries of virtual instruments (VSTs), and reliable MIDI devices. Such tools are not optional—they are essential to optimising each phase of the workflow, from initial ideation and orchestration to mixing and delivery. Mastery of these resources enables composers to meet tight deadlines, compose within the sonic standards expected by production teams, and deliver high-quality tracks that can be seamlessly integrated into post-production and final edits. In this sense, technical readiness is not simply a matter of convenience, but a strategic necessity for maintaining relevance and securing work in an increasingly demanding and standardised media environment. This naturally raises the issue of the necessary equipment and, above all, the budget allocated to composition, which must not only cover the amortisation of such equipment, but also make it possible to record real musicians—another central element in the added value brought by the soundtrack.

THE IMPACT OF FUNDING ON CREATIVITY

The question of budget is far from an anecdotal one, as it has a direct influence on the sound the composer can expect to obtain, the number of musicians that can be recorded, but also the other craftsmen in the production chain, such as the mixer or the copyist, for example. Nguyen

Trong Binh is a director and French film critic, a member of the editorial board of *Positif* magazine and a former lecturer at the University of Paris I Panthéon-Sorbonne (Moine, 2014). He reminds us:

The share of music in a film's overall budget is far greater in the United States than in France, for example, where the budget is sometimes far too low to afford to commission and record an original score. The question of music often arrives too late in the production process, as an adjustment variable on the overall budget! (2014)

The film music budget in fact encompasses several elements that are coordinated by the composer according to need: an orchestrator, a copyist to create the scores, musicians or an orchestra for recording, a mixer for mixing. Reducing the budget necessarily reduces the need for intermediaries or the use of real instruments. As Julien Vega,¹ French composer and arranger, puts it:

In economic terms, I'd say we start from the premise that we have no budget at all. In fact, that's often the case, so we operate as virtually as possible, and if there's a small budget for recording then we go for the essentials.

Thus, the budget allocated to music appears to be a strong constraint on the artistic possibilities that composers will develop. Soloists or small ensembles will be favoured over orchestras and the use of libraries, sound banks, or plugins will be more important. However, as Laetitia Pansanel-Garric,² French composer, orchestrator and conductor, describes, one of the creative and sonic challenges of using real instrument recordings is “the fluidity of the musical gesture and the authenticity of the sound of a real instrument”, which cannot be reproduced digitally. Questions of interpretation and playing style, which require precision, can only be obtained by recording musicians.

¹Since 2011, he has worked with his major partner Cézame Music Agency on a number of TV, radio, and advertising soundtracks, notably for UNICEF, Dior, Koskenkorva. Since 2019, he has been composing original music for documentaries. <https://www.kaptainmusic.com/artists/60d9929a8a67895eff0bc7ab/Julien%20Vega>

²Laetitia Pansanel Garric is a French composer, orchestrator, and conductor whose screen credits include short and feature-length fiction, animation, and documentaries. She is also co-founder of Giant steps medias, a production studio and musical edition agency, and teaches at the University of Lyon 2 Louis Lumière. <http://www.laetitia-pansanel.com/>

The rates charged by composers vary according to the project (documentaries, commercials, feature films). As Erwann Chandon (<https://www.erwannchandon.com/>), French film music composer, points out, a fee can change: “depending on the artistic interest I find in it. I’ll be more inclined to make financial concessions if the project appeals to me artistically and I’m asked to compose music I like.” Most of the composers interviewed are represented by agents who negotiate contracts.

Of the 7 professional composers who spoke to us about their remuneration, they indicated that it depends on an agency (2), for some the production (2), some prepare quotes (2), and 1 relies on a rate sheet. In the panel we surveyed, it is interesting to note that half ultimately rely on “Buyout” contracts, which are limited rights contracts, payable as a one-time service fee, without the composer retaining any rights over the distribution. The recent report by the European Composer and Songwriter Alliance (ECSA) highlights to the European Commission a situation where an increasing number of buyout contracts are becoming common, leading to the precariousness of film music composers, with the audiovisual sector being particularly affected by this type of practice.

ORCHESTRA AND REAL INSTRUMENT RECORDINGS

For example, it is significant to observe that, due to economic constraints, some composers withdraw original recordings. This is quite unfortunate for two reasons. First, because for many productions, recording real instruments can convey much more emotion and provide real added value to the original soundtrack. Second, because in the age of artificial intelligence, composing with an orchestra or real instruments brings an incomparable, unique quality. However, the questions of competitiveness today, in the field of cultural industries, will arise not only in economic and production circuit terms, but also in qualitative and aesthetic terms, one of the major challenges presented by AI today. A FAMES survey was conducted to explore the ways in which, in this particular case, the attractiveness and competitiveness of the recording process is achieved. This comparison between the orchestra in North Macedonia and the Cannes National Orchestra focuses on the operational differences in how recording sessions are organised and regulated. In particular, the North Macedonian orchestra demonstrates remarkable versatility and a turnkey delivery model,

offering an integrated workflow from recording through to editing, which proves to be a key asset in terms of efficiency and industrial competitiveness—considering the costs of recording an orchestra, which are much lower at FAMES than in France. However, on closer examination, while this may indicate a form of interoperability at the European level, it does not constitute a decisive or, in any case, objective criterion in our analysis, as it would also need to be considered in relation to the cost of living and other contextual factors.. One could argue against this by noting that the European Commission itself has always attempted to regulate, through the circulation of goods and people via its directives, the possibility of distributing audiovisual production in multiple European countries (Harbor, in Ward, 2008).

However, it is much more relevant to consider what the FAMES orchestra offers in terms of services *in addition* to the orchestra recording. That is, what specific workflow is proposed and to what extent does it make the service truly competitive compared to other possibilities. Actually, a standard orchestral recording setup typically requires extensive technical preparation. This includes the installation of at least 64 microphones, in addition to ambient mics, and involves a team of no fewer than 3 to 4 sound technicians, plus 1 recording engineer. The deployment entails the construction of a dedicated control room setup, equipped with at least two computers—one of which serves as a backup system. This stage alone demands a full day of work per technician prior to the recording session. Following the session, disassembly and post-production must also be accounted for: this includes the editing of recorded tracks, the preparation of tempo guides (click tracks), and the organisation of orchestral stems by section (violins, brass, etc.). A further full day is usually required for dismounting the setup. The budget must therefore reflect not only the musical labour but the entire technical infrastructure supporting the session.

The first element to consider is that the FAMES orchestra provides an all-inclusive orchestral recording service. This means it has a dedicated room for recording music for the screen, with a set of microphones permanently installed and ready for use at any time. This microphone setup is connected to a recording booth. The orchestral recording service includes a deliverable with all the instruments recorded in separate tracks (either by moment or according to the instrumentation, totalling over 48 independent audio files, or even more), allowing the composer, starting from a general guide track,

to create their own mix. The second element to consider is that the sessions are conducted remotely and the composer is not required to travel to North Macedonia. The orchestra utilises two systems: the Zoom software for direct contact with the conductor and for requesting retakes of specific passages and the Audiomovers software to hear what the orchestra is playing in high-fidelity quality. Finally, the orchestra is equipped with individual headphones for each musician, allowing them to play “to the click,” meaning they have precision down to the measure to be able to resume different recording sessions or make corrections or improve musical interpretation.

All these elements and this technical environment, which we could call the “pre-recording” stage, are fundamental to the production process and can significantly accelerate and completely enhance the workflow of a real recording. The composer receives a recorded and potentially edited deliverable here within two hours. This allows them to get their tracks directly into their DAW, to generate stems, and to deliver an edited version to the production before mastering.

We can use as a comparison point the recordings made with the Cannes National Orchestra. The session is longer, but what is particularly important is to consider the time and effort required to obtain the 48 recording tracks as output. The Cannes National Orchestra does not have dedicated recording rooms, so a specific setup needs to be prepared for the orchestra at the time of the session. The preparation requires a long time (at least 4 hours) to set up the 60-microphone setup. Then, there is also about 4 hours needed for dismantling the setup and for equipment delivery/return. Additionally, there is the need to rely on service providers or rentals for additional equipment (headphones) and for handling the equipment. The real competitiveness here is not dependent on the cost. It is rather a question of time: the North Macedonian orchestra saved more than 8 hours for nearly the same result. This has consequences in terms of production and the final product. The use of a high-quality orchestra could be achieved in other countries if dedicated spaces were available, equipped with ready-to-use technology. The degree of competitiveness for music in audiovisual production might lie in the ability to understand all these steps, to provide a specific environment ready to be used for this purpose, enabling orchestras of very high quality to carry out recordings in short, or even ultra-short, workflows.

PRE-EXISTING MUSIC AND COMMUNICATION

Temporary tracks are pre-existing music that is edited onto the images before the composer sends the original music. According to Ronald H. Sadoff (2016, p. 166), the existence of temporary track

renders the music editor increasingly influential in defining and promulgating an amalgamation of conventions that we ultimately experience from the score. In fact, this makes him or her a touchstone—an influential governor whose choices can actively engage and perpetuate conventions and clichés. In building a temp track, a music editor must address and consolidate managerial, commercial, musical and cultural concerns.

With a certain amount of editing already done, temp tracks indicate the moments when it was decided to have music or not (Karlin & Wright, 2004).

Temporary music also helps the director, especially when a (partially unfinished) film has to be shown to the producers who are financing it. Producers want to see the final idea and don't want to imagine the music (or anything else). Notably, film music is composed, mixed with other sounds, and edited only when the film is almost finished. Since directors are generally unfamiliar with the language of music, temporary music helps a director communicate with a composer and directors use temporary tracks to indicate the type of music they want. If this is to be a tool or a source of inspiration for the composer, s/he must avoid the pitfall of imitation. On the other hand, when a director is so attached to the temporary track that s/he keeps it in the final cut, it is called "temp love". According to George Burt (1994), this can be counterproductive and composers may rebel against temp-tracking or give up. But as Fred Karlin and Rayburn Wright point out, composers may persuade the director of viable alternatives. Recently, an interview with Maïdi Roth (interview, 2025) revealed a completely different approach. It is not uncommon for directors to provide the composer with a version of the film containing pre-existing soundtracks in order to illustrate the desired tone or atmosphere. According to Roth, once a musical idea has been imprinted in this way, it becomes very difficult to replace it with an original composition. To overcome this challenge, she deliberately avoids submitting a single demo. Instead, she creates multiple versions, each with distinctly different moods, allowing the director and production team to detach themselves from the royalty-free temp tracks initially used in the edit. In the history

of cinema, certain composers have been the victims of these tracks, which the director sometimes seems unable to do without. The most famous of these is Stanley Kubrick for the film *2001: Space Odyssey*, where an original score was composed by Alex North and replaced by pre-existing music, including music present on temporary tracks.

However, some directors do indicate a taste for certain types of music, as Julien Vega (oral interview with the author, 2023) puts it:

If the director says to me ‘this music is perfect for me, it’s the music I would have put in my film if I could’, then I listen really carefully and try to understand what he likes in that style, what the codes are, etc.

Communicating with a non-musician is always a delicate matter: in terms of glossary (like some producers would like some “epic” music for their sequence, or “melancholic” or whatever, that have nothing to do with musical motion) and of metaphors that could possibly lead to misunderstandings, although this question only comes up a little in the interviews currently being conducted, it comes up regularly in the composers’ Master Classes. Indeed, since the challenge is to capture the influences and desires of directors who are often neither musicians nor music lovers, the mode of communication is based on subjective aspects or terms that are sometimes ambiguous or inappropriate. These aspects of communication are fundamental to establishing a working relationship between a composer and a director or producer. Maïdi Roth repeatedly emphasised what she considers one of the essential skills of a film composer: “the ability to listen”.

In a competitive industry, where producers must choose collaborators who can adapt quickly and align with the emotional and aesthetic goals of a project, such interpersonal skills are not peripheral—they are central to professional sustainability. While competitiveness ultimately lies in a composer’s ability to inject vitality into the score and convey emotion, it is first and foremost shaped by the capacity to engage in a collaborative creative process. The ability to listen, propose, and negotiate different musical directions becomes a decisive advantage in a context where creative flexibility and relational intelligence can determine whether a composer is hired again.

CONCLUSION

This chapter set out to examine the concrete stages of the film music composition workflow, not as a neutral sequence of technical operations, but as a key factor shaping the professional competitiveness of composers in today's audiovisual industry. While processes may vary between projects, our survey and ethnographic observations have revealed that certain phases in the production chain are structurally constrained—particularly in terms of duration—and leave little room for flexibility. In a context where composers are expected to deliver high-quality work under increasing time pressure, mastering this workflow becomes not only a matter of technical proficiency, but also a strategic asset.

The composers we surveyed responded to these pressures by adopting a range of adaptive strategies, including front-loading project preparation, optimising the scheduling of recording sessions, or outsourcing certain tasks. These practices reflect an evolving professional landscape in which creative efficiency is a prerequisite for sustaining activity, securing contracts, and maintaining artistic standards. By identifying a shared framework consisting of eight key stages—from project discovery to final delivery—this study contributes to a better understanding of how competitiveness is actively constructed through workflow design and decision-making.

The findings of this chapter reveal a set of shared phases within the film music composition workflow—ranging from initial project discovery to delivery of the final mix—and expose how composers navigate economic constraints, technical requirements, and artistic choices throughout these stages. While certain steps in the workflow appear non-negotiable due to industrial norms (e.g., scoring, feedback cycles, delivery formats), others remain flexible and are approached strategically according to budget, timeline, and technological infrastructure. Notably, the study identifies a tension between accelerated production schedules and the creative ambition of original scoring, a tension that is mediated through adaptive practices such as the delegation of mixing, the selective use of virtual instruments, or the outsourcing of orchestration. Ultimately, by foregrounding the compositional workflow as a site of both aesthetic negotiation and professional adaptation, this chapter contributes to a deeper understanding of how creative value is produced, managed, and leveraged within the European film industry. It argues that nurturing these workflows—technically, economically, and institutionally—is key to supporting the next generation of composers and to preserving the distinctive expressive quality of European audiovisual culture in an increasingly competitive global market.

Although exploratory, these findings open up promising avenues for further research into how economic, temporal, and technological pressures redefine artistic labour in the screen music sector—particularly in the European context, where cultural specificity and industrial agility must be continually balanced.

This protocol comprises eight main stages: discovery of the project, discussion with the producer, preparatory composition work, first demo, production feedback, recording, editing-mixing, delivery. The main constraints encountered by this first panel of composers were budgetary and communication-related. Directors and producers rarely have a real, constructed representation of musical technique. We can also assume that the producer's constraint is different from that of the director's, since it is the producer who assumes the financial aspects and markets the finished product. Thus, one of the constraints to be measured will be that of the musical norm according to a cinematographic genre or stylistic expectation.

Finally, we have seen that the question of real instrument recordings could arise as a crucial element. Rather than comparing the prices, we have compared the time used to export a multitrack recording session. Optimising this time will help the composers to be more competitive, not only by reducing the cost and the time of the workflow, but also in increasing the overall quality of the project by including real instrumental music that will definitely create an add-value compare to other digital means of music composition (VST, electronics, including AI generative music). Ultimately, understanding music composition for visual media as a workflow embedded in industrial, relational, and technological systems allows us to recognise its full strategic value—not only as an art form, but as a crucial vector of differentiation and innovation within the European screen industries.

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PART III

Global Perspectives



Audiovisual Regulation of VoD Platforms in the EU and Latin America: Between Level Playing Field, Competitiveness and Rationality of Audiences

*Marina Rossato Fernandes, Antonios Vlassis,
and Lucile Coenen*

INTRODUCTION

Public policies are a historical feature of the European film and audiovisual industries—with financial aid, market regulation, intellectual property rights regulation and various regulatory and support measures for the protection and promotion of cultural diversity as key components of national and European audiovisual and cultural action (Calligaro & Vlassis, 2017). Clearly, given its transversality, the film and audiovisual industry raises several major issues for its public regulation (Vlassis, 2015):

- (i) Economic issues as the film and audiovisual industry is a key sector in terms of growth, competitiveness and employment for national

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and regional economies. It is revealing that, according to the UNESCO Institute for Statistics (2016, p. 11), audiovisual services are increasingly becoming the most important cultural service in terms of trade exchanges.

- (ii) Political issues given that film and audiovisual goods—seen as vehicles of shared ideas, values and collective representations—are resources of the power of States and of their capacity to shape their political environment. In this respect, film is the sector in relation to which most of the export and import measures are put in place (Deloumeaux, 2018, p. 136).
- (iii) Cultural and identity issues because film and audiovisual goods and services also have a distinct cultural value. Audiovisual expressions—distributed by the audiovisual industries—are usually components of national, regional, local or community identities and several actors are increasingly worried about the consequences of the cultural dominance.

On the one hand, the transversality of audiovisual and media industries is expected to raise normative conflicts, insofar as audiovisual goods and services are located at the junction of several sectors (Vlassis, 2015). As Sarikakis (2007, p. 14) argued, media and cultural industries have not only become increasingly central in the economies of European countries, but also “the terrain of contestation and consensus” regarding competitiveness, self-governance and cultural identity. On the other hand, the EU and EU Member States have played a key role in promoting internationally the importance of public regulation and of public policies in the audiovisual sector. The EU is the only regional multilateral organisation that ratified in 2006 the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions (CDCE), which explicitly recognises the specificity of audiovisual and cultural goods and services and the legitimacy of cultural policies for the protection and promotion of the diversity of cultural expressions. Since the mid-2000s, the EU has sought to promote the key principles of the UNESCO CDCE, such as cultural specificity and importance of public policies in the audiovisual-cultural sectors. Moreover, the EU has had a strong normative influence on shaping audiovisual policies in several regions, such as Latin America (Vlassis, 2016a; Pauwels & Loisen, 2016; Fernandes et al., 2021a).

However, in multiple national and regional contexts, Video-On-Demand (VoD) streaming services have been key drivers of the need to

rethink cultural policies and audiovisual media regulation (Flew, 2016; Ranaivoson et al., 2023; Meir & Smits, 2024). US-based VoD platforms, such as Netflix, Disney+, HBO Max, Apple TV+ or Prime Video, trigger major challenges for film and audiovisual governance related to the production, distribution, broadcasting and consumption of audiovisual goods and services. The Audiovisual Media Services Directive (AVMSD), adopted in 2010 and revised in 2018, has its roots in this changing landscape of film and audiovisual production, distribution and consumption, as well as the increasing prevalence of on-demand streaming services in the audiovisual sector. The 2018 revised AVMSD proposed two major policy advances:

1. Quotas: On-demand audiovisual media services are required to include a minimum of 30% European works in their catalogues and ensure the visibility and prominence of these works.
2. Investments: Member States have the option to mandate financial contributions from streaming platforms operating within their jurisdiction or catering to audiences in their territories, even if these providers are established in other member states. Such contributions can include direct investments in the creation of European works or contributions to national funds.

As such, the transversality of film and audiovisual industries, the long-standing normative tradition of the EU of shaping audiovisual governance worldwide and the global activities of US-based VoD platforms trigger three key questions:

- (a) What has been the key rationale of including quotas and investment obligations towards VoD platforms in the AVMSD revision?
- (b) In which ways do the global VoD platforms influence the EU objective of promoting film and audiovisual industry through public regulation?
- (c) To what extent is this rationale shared by other public authorities and stakeholders abroad in non-EU regions and countries?

Firstly, based on policy discourse analysis (Puppis, 2019; Schmidt, 2017), the chapter aims to analyse how key stakeholders in EU audiovisual policy-making, such as European digital and communication companies as well as organisations of film and audiovisual professionals, deal with the

governance of the audiovisual sector in a platform-dominated market. The Federation of European Film Directors (FERA), EUROKINEMA, the Association of Commercial Television in Europe (ACT), DIGITALEUROPE, the European Broadcasting Union (EBU), DOT Europe,¹ the European Coalitions for Cultural Diversity (ECCD) and Netflix are taken into account in the analysis. Here, the chapter's objective is threefold: to comprehend the modes of governance these stakeholders have proposed for the audiovisual sector with a special focus on the two key advances proposed by the 2018 AVMSD revision, to grasp which aspects are associated with competitiveness for the stakeholders and to identify where they have perceived market distortions. Secondly, the chapter seeks to explore how the global activities of US-based platforms affect the normative influence of the EU in other regions, such as in Latin America and to understand whether and how the new measures adopted in the AVMSD can be a normative landmark in Latin America, where the EU has had a longstanding tradition of shaping regional and national audiovisual policies.

THE AVMSD REVISION BETWEEN DIVERSITY AND LEVEL PLAYING FIELD

Different perspectives on the AVMSD revision and competitiveness within the audiovisual industry shall be established through the exploration of several stakeholders who either drive the digital transformation or are profoundly affected by the economic, social and cultural consequences of this transformation (Vlassis, 2017). In 2013, the European Commission adopted a Green Paper *Preparing for a Fully Converged Audiovisual World: Growth, Creation and Values* for which stakeholders were invited to share their views towards the AVMSD in a public consultation. The Commission identified several issues to be considered in the review. The following section outlines the differing views and perspectives coming from European associations and companies (see the list above).

¹ Previously known as European Digital Media Association (EDIMA), it was re-launched as DOT Europe in 2020.

Ensuring a Level Playing Field

Ensuring a level playing field is crucial for maintaining fair competition, protecting consumers, promoting cultural diversity, providing legal clarity and addressing contemporary challenges in the audiovisual sector. This principle aims to create a regulatory environment that balances the interests of industry stakeholders with broader societal goals. Several organisations, including EURALVA, ECCD, EUROKINEMA, FERA and EBU, deemed the provisions of the 2010 AVMSD relevant yet emphasised that there was work to be done in terms of fairness and effectiveness. They proposed extending the scope of the provisions to cover providers offering audiovisual content that does not fit the “TV-like” category or to those hosting user-generated content. Furthermore, FERA highlighted that new platforms have emerged and operated in the same market as traditional services but enjoyed certain exemptions, which distorted competition and was therefore considered as unfair. Additionally, EBU, while acknowledging the current effectiveness of the 2010 AVMSD, anticipated potential challenges in the future with ongoing media convergence and increased consumption of audiovisual content through platforms. Hence, EBU advocated for an extension of the scope, particularly for operators of significant audiovisual platforms and the establishment of a separate set of rules. As such, whereas convergence and digitisation of cultural content intended to increase competition between broadcasters and online players, between old and new providers of audiovisual content, as argued by EUROKINEMA (2015, p. 3), “the difference of policy treatment between the two categories of players may result in serious distortions with respect to the promotion of cultural diversity and media pluralism”. In view of this new development, placing obligations and responsibilities exclusively on old providers of audiovisual content, such as television broadcasters is “neither effective nor fair” (EBU, 2015). To wit, regulating streaming services, which play a role in citizens’ access to audiovisual media services, is related “to the cultural and media policy objectives underlying the AVMSD” (EBU, 2015, p. 8).

On the contrary, DOT Europe and DIGITALEUROPE including Netflix argued in favour of keeping the status-quo established by the 2010 AVMSD provisions. The distinction between linear and non-linear services was seen as relevant due to the different temporality of linear and non-linear content: when it comes to non-linear content, the user proactively decides what content to watch and when to do so. They argued that on the

one hand, defining norms for this type of content falls outside the scope of the 2010 AVMSD and, on the other hand, regulating platforms, streaming and sharing services with concepts designed for “traditional” audiovisual goods and services ignores the nature of the Internet. In addition, DOT Europe emphasised the significance of digital growth in Europe, asserting that excessive regulations may become obsolete over time. In this respect, an extension of the scope of the AVMSD was deemed to endanger not only the business model of the online platforms, but also major sociocultural aims. Changing the scope could have “a negative impact on the availability of content in the EU, media pluralism, innovation and the development of new products” (EDIMA, 2015, p. 11). These stakeholders opposed expanding the scope, considering the current coverage appropriate. They did not perceive any distortions in the market and, citing the distinct immediacy of content consumption in non-linear services (as users can actively decide what content to watch in case of non-linear), saw no necessity to review regulations between linear and non-linear services. As such, consumers and content producers were seen as the beneficiaries of these developments. “The market provides users a wealth of choice” (DIGITALEUROPE, 2015, p. 7) and according to these stakeholders, any form of regulatory interference would impact the free choice of consumers.

Promoting European Audiovisual Content

The promotion of European content has triggered political debates as it implied the potential extension of quota mechanisms to streaming services and the financial contributions of online providers to the production and rights acquisition of European works.

The application of quotas to streaming services and the obligation for financial contribution to local content was strongly opposed by associations of the digital and communication sectors including Netflix, which advanced a twofold argument: the defence of free choice of consumers and seeing streaming services as a valuable tool for promoting cultural diversity. According to them, in a world of increasing choice, the services best positioned to respond to consumer demand will continue to distribute a certain amount of local cultural content. Put differently, unlike the State sovereignty in cultural affairs, these associations argued in favour of the sovereignty of consumers. Indeed, as argued by the ACT (2015, pp. 17–19), “if our consumers feel we are offering the wrong mix of content, they will migrate to another platform or service with a different

content offer. If there were such evidence, it would be for the market, not the regulator, to correct the market failure". In this respect, quotas for national cultural content are seen as inadmissible and the EU has "neither the legal competence nor the administrative capacity to seek to harmonise the daily operational practices of broadcasters to this extent". In addition, it is argued that quotas are detrimental to the personalisation of digital services. When watching content via an online service, subscribers already control their own viewing experience and the titles surfaced to them are highly personalised. "There is no need for any regulatory measure that would interfere with a VoD company's personalised approach to providing their services" (EDIMA, 2015, p. 21).

Accordingly, these stakeholders highlighted that regulations that have suited the analogue audiovisual era may not be suitable today insofar as "digital services and devices have contributed to drive cultural diversity by making European content widely available and discoverable" (DIGITALEUROPE, 2015, p. 18). Besides, streaming services have strongly supported the creation of European works. European culture is exported and viewed outside Europe thanks to the new ways that digital content can be disseminated and monetised. It is worth highlighting that DIGITALEUROPE explicitly suggested that European audiovisual policy should imitate other successful audiovisual industries, such as South Korea. "Korea has done what France failed to do: promote the country's film industry at a low cost and encourage efficiency. Creating a dependence on public subsidies such as those generated by copyright levies hinders, rather than helps European culture" (DIGITALEUROPE, 2015, p. 20).

As a result, Netflix expressed concerns regarding quotas and prominence, which it perceived as potentially harmful to the viability of both existing and emerging business models, posing a risk of stifling market dynamics and generating distortions. In other terms, public regulation would have the opposite effect. In addition, the introduction of prescriptive quotas would endanger a sustaining business model which achieves major goals of the EU audiovisual policy, "providing European consumers with the ability to access a wide variety of European and international content" (Netflix International, 2015, p. 6). It is worth noting that this argument is constantly promoted by US-based VoD platforms. In March 2023, Reed Hastings, the Netflix's founder and executive chairman, emphasised streamers' ability to "attract viewers from one country to content from another", by saying that Netflix has become "the biggest builder of cross-European culture in the EU". This discourse is justified on the

basis that all the other networks are “national networks who specialise in one language group”, while Netflix “specialises in connecting” (Deadline, 2023). According to this viewpoint, in a platform-dominated market, more than ever, the market will take care of itself, generally seen as a valuable tool to ensure socially agreed public values. Indeed, beyond the contestation between economic and non-economic values pursued, the promotion of cultural diversity in the audiovisual sector is not perceived in contradiction with the free market and free trade logic.

On the contrary, for the associations of broadcasters and audiovisual professionals, the main issue relates to the lack of contribution to the production and distribution of European works by certain online players, which either fall outside the current scope of the AVMSD or try to avoid stricter national rules through jurisdiction shopping within the EU. In a similar vein, by mentioning the UNESCO CDCE, these associations stressed that online players undermine the effectiveness of European and national rules and distort competition among operators. In light of the growing number of global players active in the value chain, it is necessary to ensure that each relevant player in the value chain invests a share of the turnover of the service concerned in the production and rights acquisition of European works. According to these stakeholders, the country-of-origin principle is seen as further enhancing the power of transnational groups, undermining future developments of local cultural players that provide local content and opportunities for local producers.

Put differently, the principle of the country of origin enables “forum shopping” from streaming platforms, which can decide on the location of their EU headquarters according to the level of protection of regulations. This situation puts the whole audiovisual sector in countries with more protective policies under high pressure, insofar as online players can settle in countries with the least stringent rules on promotion of European works. In other terms, they can use the country-of-origin principle to cherry pick the location of their European headquarters (Valcke & Lievens, 2009, p. 138). Consequently, taking the country-of-origin principle as the leitmotif of the AVMSD, this creates unfair competition between services and a race to the bottom for media policies of member states. Clearly, the main issue was that the application of the country-of-origin principle was not combined with the harmonisation of national audiovisual legislation. In this context, the European Coalitions for Cultural Diversity recommended the principle of country of destination in article 13 of the AVMSD. As such, in the absence of harmonisation of rules across Europe,

the EU legislation should give the country of destination the possibility to apply its policy on the promotion of European and national works.

To conclude, two questions have arisen in the audiovisual policy-making in the light of VoD platforms: whether EU and national rulemaking exacerbates or alleviates the problems of the audiovisual sector and whether the absence of rules imposed on the VoD platforms is beneficial or obstructs the achievement of the EU's economic and sociocultural aims (Kalimo & Pauwels, 2009). The key rationale of the AVMSD revision was to legitimate public intervention towards global VoD platforms and to generate new regulations, such as content quotas and investment obligations, towards streaming services across the EU. By seeking to extend a cultural policy toolkit to non-EU online services (Vlassis, 2023a) and despite strong objections coming from powerful associations of digital industry, the AVMSD revision generates a level playing field for stakeholders in the European film and audiovisual economy and seeks to promote cultural diversity in the European audiovisual sector (Albornoz & García Leiva, 2019; Vlassis, 2023a). However, the AVMSD should be analysed not only as a European response to the disruptive action of global VoD streamers in the audiovisual market but also as a policy process integrated into a broader and overall cross-national debate regarding the governance of audiovisual streaming services. Thus, it is crucial to investigate whether the key rationale of the AVMSD is shared by public authorities and stakeholders abroad, notably in regions such as Latin America, where the normative influence of EU audiovisual policies was strong in the past years.

THE EU INTERNATIONAL ACTION CHALLENGED BY GLOBAL VOD PLATFORMS

The EU's Normative Influence on Latin American Supranational Audiovisual Policy

The European Union has a longstanding tradition of shaping supranational media policies in Latin America, particularly within influential regional audiovisual entities such as the Specialised Meeting of Audiovisual and Cinematographic Authorities of Mercosur and Associated States (RECAM) at Mercosur² and Ibermedia Program in the Ibero-American region (Vlassis, 2016b).

² Established in 1991 through the Treaty of Asunción, the Common Market of the South is a free-trade bloc that includes Argentina, Brazil, Paraguay and Uruguay.

The EU has been acknowledged as a model of supranational integration within the Southern Common Market (Mercosur) (Dri, 2010) and has highly influenced the development of supranational audiovisual policies in the region. Since its creation in 2003, RECAM has viewed the European Union as a model to achieve its ambitions in fostering the integration of Mercosur's audiovisual industries (Canedo & Crusafon, 2014). The RECAM's early minutes meeting stressed its alignment with safeguarding cultural diversity (RECAM, 2004a) and envisaging the transfer of the EU media policy (RECAM, 2004b). The milestone in this relation was the implementation of the Audiovisual Mercosur Program (AMP), where the core idea lies in creating "a Mercosur Media Program based on the EU MEDIA Program" (European Commission, 2007). Through AMP, the EU invested resources in developing Mercosur's supranational media policy, promoting itself as a model to be followed. The implementation of AMP faces numerous constraints and its results were less significant than the original ambitions (Fernandes et al., 2021a). Nevertheless, the normative influence of the EU shaped media policy in this region.

In the Ibero-American region, the EU was similarly viewed as a model in establishing the Ibermedia Program, the principal Ibero-American entity dedicated to supporting the audiovisual sector in the region. Created in 1997, Ibermedia was inspired by the EU MEDIA Program (Falicov, 2012), with the objective of fostering an audiovisual industry capable of competing with US dominance (SEGIB, 2009). Until now, the audiovisual policies in Ibero-America that have been developed concentrate primarily on traditional media, especially cinema and prioritise funding for co-productions. A broader ambition in the relationship between the EU and Ibero-America was to create a Euro-Latin American space and establish an industry that not only champions its unique identity against the backdrop of US hegemony (Crusafon, 2011) but also nurture shared cultural values (Domínguez & Montero, 2009). Unlike RECAM, Ibermedia did not engage in policy transfer with the EU, but its normative influence remains evident, particularly in the shared ideals of protecting cultural diversity and opposing the pervasive influence of the Hollywood film industry.

It is crucial to recognise that Latin America lacks the same political and institutional clout as the EU to enforce regulations. The foundation of supranational policies lies in the preservation of sovereignty and necessitates negotiations among member states to harmonise film and audiovisual policies within the region (CACI, 1989; Mercosur, 2003). Consequently, these supranational bodies are crucial in sparking debate

and promoting regulation at the national level (Fernandes et al., 2022). Thus, the EU's influence through these institutions has demonstrated its endeavours to broaden its normative impact in Latin America. By drawing on its regulatory experiences, the EU aims to shape the development of supranational media policies that not only embody shared cultural values but also cater to economic interests (Vlassis, 2016b). This panorama reveals the central ideas that marked this relationship. First, the idea alignment on the defence of cultural diversity underscores the cultural perspective of the audiovisual sector, where the EU has a strong normative engagement (Pauwels & Loisen, 2016). Second, one must mention the rationale of formulating supranational policies for enhancing dialogue among regions. Essentially, this interaction is primarily facilitated through policy measures. While there is a clear economic objective behind the goal of creating a regional market for the free flow of audiovisual products, achieving this objective necessitates the creation of cultural policies. These policies must acknowledge the intrinsic cultural value of audiovisual content, ensuring that the drive for market growth is balanced with the preservation and promotion of cultural diversity. This highlights the importance of public policy over the process of economic liberalisation and the principle of free trade. Third, the relationship between these regions was driven by the idea of policy transfer, where the EU is perceived as a normative model to be followed, which has influenced Latin American supranational audiovisual policies since its creation.

To explore the normative influence of the EU and especially of the AVMSD, in Latin America, this section uses policy discourse analysis (Puppis, 2019; Schmidt, 2017) to investigate the underlying rationality in the discourse of different stakeholders. This includes an analysis of the ideas and policy solutions presented by Latin American supranational audiovisual institutions, such as the General Ibero-American Secretariat (SEGIB) and Ibermedia, the main civil society organisation on media regulation in Latin America, the Latin American Observatory for Regulation, Media and Convergence (OBSERVACOM) and industry professionals and entities within the private sector, attending the market and policy forum Iberseries & Platino Industria.³

³ An industry event organised in 2021 in Madrid by the Secuoya Foundation, EGEDA and the Federación Iberoamericana de Productores Cinematográficos y Audiovisuales (FIPCA).

Latin America's Regulatory Response to VoD Platforms

Considering the influence of the EU in Latin American supranational media policy, such as at Mercosur or Ibero-American region, one might have anticipated the EU's AVMSD to serve as a model for Latin America's approach to regulate global VoD platforms. In contrast, Latin America's response to the rise of VoD platforms until now indicates weakened EU normative influence.

While the EU has been at the forefront of developing supranational regulations to manage the complexities of the audiovisual landscape, Latin America lacks a cohesive supranational media policy tailored to regulating VoD platforms. At the national level, despite ongoing debates and the introduction of legislative initiatives within the region's principal audiovisual markets, such efforts have largely remained unfulfilled. The exception to this trend is the area of taxation, where progress has been noted across several countries (Baladron & Rivero, 2019). Nonetheless, the implementation of quotas and investment obligations, key components of the AVMSD, remains stagnant in the Latin American setting.

To explore the normative influence of the EU, especially of the AVMSD, in Latin America, this section also investigates the underlying rationality in the discourse of different stakeholders. Firstly, during face-to-face interviews, supranational entities in Ibero-America, specifically SEGIB⁴ and Ibermedia, articulated that regulation of VoD was not prioritised within their agendas, attributing this to be beyond its scope and emphasising that no regulatory frameworks are currently under development. Although these institutions lack the authority to enforce regulations, their critical role in stimulating debate helps to influence policy at the national level. When probed about formulating policies in the digital landscape, especially in light of VoD platforms' significant influence on the audiovisual sector, the AVMSD was not referenced and there was no mention of market distortions that could justify introducing regulatory measures. In the context of Mercosur, RECAM did not articulate any stance on VoD regulation and given its constrained political influence (Fernandes et al., 2021b), scepticism prevails regarding its potential to undertake such initiatives.

⁴Ibero-American General Secretariat, responsible for fostering cooperation across the Ibero-American cultural sector.

This signifies a departure from the traditionally strong influence of the European Union on Latin American media policy. Intriguingly, the discourse at the grassroots level, particularly among leading film professionals, similarly lacked a concrete demand for supranational regulation or adopting the AVMSD as a reference (Fernandes, 2023).

In a critical policy debate forum, the Iberseries & Platino Industria, the prevailing discourse circulating among industry professionals framed VoD as an opportunity rather than a threat. Here, the stakeholders did not elaborate on market distortions and there were no discussions on the need for regulation to ensure a level playing field. On the contrary, the VoD was seen as having the potential to increase the competitiveness of the Ibero-American audiovisual sector, especially by boosting the funding to local/national productions. Therefore, rather than viewing the AVMSD as a tool to enhance competitiveness that could be used as a reference for VoD regulation, the policy agenda centred on securing substantial budgets for audiovisual productions that would enable Ibero-American content to be appealing for the large-scale productions of VoD platforms (Fernandes, 2023).

Unlike initial discussions surrounding the formulation of Ibero-American audiovisual policies focusing on challenging the power of US majors, the current debate has taken a different direction. The European Union, previously at the heart of these discussions as a model for its cultural protection policies, is no longer the central point of reference. When the EU is mentioned in contemporary debates, it is not for its role as a defender of cultural perspective or as a corrective force against market distortions. Instead, its liberalising tendencies are highlighted, indicating a significant pivot in the narrative. This shift reflects a broader change in the discourse on media policy within the Ibero-American context, where the EU's approach is perceived more for its potential to liberalise the market than for its protective measures, underscoring a departure from previous priorities.

Amidst this shift, the OBSERVACOM emerges as one of the few voices persistently upholding the original principles that once guided the policy debate, particularly emphasising the AVMSD's foundational values. OBSERVACOM is a regional think tank composed of academics and experts in communication, specialising in regulation and public policy, stands out as the sole policy actor referencing the AVMSD. In its advisory role to UNESCO, OBSERVACOM undertook a thorough analysis of the AVMSD, underscoring its rationale for developing public policies that

support democratic values, uphold citizens' rights and are rooted in the principle of cultural diversity. The organisation highlighted the directive's critical role in ensuring the competitiveness of European industries and media services, emphasising its significance in promoting a balanced and diverse media landscape (OBSERVACOM, 2019, p. 10).

OBSERVACOM advocated for regulating Over-The-Top (OTT) services, recommending measures such as financial contributions, the promotion of local and national content through investments, quotas and ensuring their visibility. These recommendations are grounded in the UNESCO CDCE and address regulatory asymmetries that disadvantage national competitors. This approach reflects a normative influence from the EU, maintaining an alignment with cultural perspectives and the broader objective of fostering a diverse and competitive media environment (OBSERVACOM, 2019, p. 25). Its position is aligned with European entities that support revising the AVMSD, including EURALVA, ECCD, EURO CINEMA, FERA and EBU. Their underlying rationale encompasses support for competitiveness and cultural diversity, advocating for key policy mechanisms such as quotas and mandatory investments.

Parallel to the absence of debates on supranational VoD regulation, there is a noticeable rise in the normative influence of US-based platforms, particularly Netflix, on the audiovisual policy debates within Latin America (Fernandes & Alborno, 2023). Netflix promotes itself as an advocate for content diversity and social inclusion, emphasising its efforts to elevate voices that have been historically underrepresented in the media. This approach is strategically utilised to bolster its cultural influence and facilitate its transnational expansion (Asmar et al., 2023). Netflix's primary narrative asserts that its platform inherently supports national content and diversity, thereby arguing that regulation is unnecessary (Fernandes & Alborno, 2023). However, this discourse leaves aside fundamental dimensions of audiovisual diversity, such as market concentration (García Leiva & Alborno, 2021). In addition, promoting strong relationships with culture professionals is a key component in the public diplomacy of US-based VoD platforms. During the COVID-19 outbreak, Netflix established a US \$100 million fund to help professionals facing hardship in the cultural industries. Furthermore, Netflix provided each US \$1 million to major public and private audiovisual agencies, such as the British Film Institute, the Italian Film Commission, the Brazilian Institute of Audiovisual Content, the Argentine and Mexican Academy of Film Arts and Sciences, the Instituto de la Cinematografía y de las Artes Audiovisuales

and the Film Academy in Spain, as well as the Netherlands Film Fund (Vlassis, 2021).

Netflix's discourse is rather explicit in the international report "Behind the Camera: Creativity and Investment for Latin America and the Caribbean – Learnings from Conversations with Key Players in the Audiovisual Sector" (Olavarría et al., 2021). Produced through a collaboration between the Inter-American Development Bank (IDB) and Netflix, this trilingual report (available in Spanish, Portuguese and English) aimed to shape regional policies (Olavarría et al., 2021, p. 15) and overtly criticised the idea of implementing VoD regulation akin to that in the EU. The report directly critiques OBSERVACOM's endorsement of "European content quotas" (Olavarría et al., 2021, p. 31), arguing that adopting the European Union's approach in Latin America would be arbitrary due to the region's unique context. Instead, it suggests focusing on incentives for content production, arguing that by generating national content, the key to success ultimately resides within the preferences of the audiences themselves (Olavarría et al., 2021, p. 31). It is important to note that the above mentioned production incentives are centred around initiatives that facilitate the production of audiovisual content in Latin American countries, especially through production services and film commissions. The prevalent argument advocates for the ease of access for transnational companies to engage in domestic production, positing this as a strategy to sustain local content generation. This approach implicitly argues against the necessity for mandatory investment contributions from these entities. This stance supports a liberalisation approach, advocating for the Latin American audiovisual sector's competitiveness to be bolstered through "talent, infrastructure, and direct incentives" (Olavarría et al., 2021, p. 15) rather than regulatory constraints.

In this context, Netflix maintains a consistent rationale similar to its stance during the AVMSD discussions. Its first key argument centres on streaming services acting as a potent mechanism for enhancing cultural diversity through producing and distributing content from various countries and its commitment to underrepresented groups. This approach mainly argues against the need for regulatory measures concerning investment obligations. Secondly, Netflix emphasises the consumer's rationale, positing that the audience is responsible for choosing what to consume, thereby suggesting that content quotas are unnecessary. This discourse is based on a market-driven approach where consumer choice dictates content production and distribution and regulation is not necessary.

The analysis indicates that, in Latin America, despite recommendations from experts and civil society organisations like OBSERVACOM, there is a lack of development in supranational media policy specifically tailored to address the challenges posed by VoD services. Furthermore, the AVMSD does not appear to exert significant normative influence in the region. Industry professionals tend to favour a liberalisation approach while not engaging in advocacy for supranational policies in this domain. Concurrently, VoD players, notably Netflix, are increasingly exerting influence, shaping policies to align with their interests and business models (Fernandes & Albornoz, 2023). This scenario highlights a unique dynamic in Latin America's media landscape, where the evolving platform-dominated environment challenges traditional policy frameworks.

Finally, it is worth noting that mid-January 2024, in a collective statement (Variety, 2024), twenty screen production organisations have urged governments to enact regulation towards streaming services. The statement provided a set of principles through which government regulation of digital streaming platforms should be guided. Among these principles, the organisations explicitly mentioned that “all platforms that derive financial benefit from conducting business in the local market should financially contribute, proportionally, to the creation of new local content for the benefit of local audiences”. Interestingly, the statement was supported by 20 organisations, including 14 from Europe and 3 from Canada, showing that whereas stakeholders are actively advocating for regulatory measures towards VoD services in the EU and in a few other countries, such as Canada, with longstanding tradition in public audiovisual policies, in several regions across the globe stakeholders are fragmented and institutions have not taken a decisive stance regarding the regulation of VoD platforms.

CONCLUDING REMARKS

The analysis of the stakeholders' perspectives on VoD regulation reveals two primary divergent political lines. On the one hand, an argument favouring VoD regulation stems from concerns over market distortions, emphasising the necessity to establish a level playing field and promote cultural diversity. On the other hand, the digital and communication sectors, emphasising the rationale of consumer choice, refute the existence of these market distortions and argue that the VoD business model is expected to be convergent, by promoting both economic competitiveness and public objectives, such as cultural diversity. Whereas in the EU,

various stakeholders supported regulation towards VoD platforms leading to the 2018 AVMSD revision, in Latin America stakeholders increasingly adopted a different rationality in line with transnational VoD platforms, showing little interest in pursuing VoD regulation at the supranational level.

Until now, the EU has witnessed a reduction in its normative power in Latin America in the context of audiovisual policy, as the core principles of the AVMSD have not resonated with Latin American supranational institutions. While certain stakeholders, such as OBSERVACOM, align with the AVMSD's rationale of promoting regulatory measures for cultural diversity and an equitable competitive environment, this standpoint is not universally embraced as a normative benchmark. There is a lack of concentrated efforts to ensure a level playing field, with VoD platforms being viewed to enhance both economic competitiveness and public objectives, such as availability and diversity of audiovisual content. The narrative advanced by US-based VoD platforms, such as Netflix, is gaining traction in policy discussions in Latin America, diminishing at the same time the normative influence of the EU. The findings suggest that the EU is experiencing a relative decline as an international actor capable of promoting EU values globally (Fernandes, 2023).

While the AVMSD has the potential for wider diffusion, it would necessitate greater efforts to amplify the EU's normative power, as the transnational VoD platforms gain in significance, converging economic considerations and cultural concerns. Strengthening influence in Latin America requires enhancing discussions on the necessity of public regulation and fostering collaborative spaces for exchanging practices involving local stakeholders. This approach could amplify underrepresented voices that lack the power to influence policy agendas (Fernandes, 2023). In addition, the challenge in regulating transnational VOD companies emphasises the need for policy formulation beyond national borders, spotlighting the opportunity for improved cooperation among regions in devising new regulatory structures. Finally, this shift may reflect a broader transformation in the EU's normative influence globally. As such, it opens up avenues for further research (Vlassis, 2023b) into whether the EU is diminishing its influence on the international stage and how US-based VoD platforms are shaping policy decisions towards audiovisual regulation worldwide and dominant understandings towards competitiveness in a platform-dominated market.

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Mapping the European Film Industry in the Argentinian, Brazilian, Mexican, South African, South Korean and Turkish Markets: Roles, Trends and Gaps

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INTRODUCTION

It is increasingly recognised by European policymakers that the European Film Industry (EFI) is a geopolitical asset (Dâmaso, 2025), which combines economic, cultural and normative value. As previous empirical research has demonstrated (Vlassis, 2025), the circulation of European film across borders supports the dissemination and consumption of diverse stories in multiple formats. This inherently reflects and upholds cultural

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diversity as a key principle of the European Union (EU)'s cultural policy (Calligaro & Vlassis, 2017) and audiovisual policy (Richieri Hanania, 2019); moreover, it supports market building through taste and audience formation.

However, the non-economic value of the EFI tends to be absent from discussions of its competitiveness. Addressing this gap, this chapter suggests that understanding the value of the EFI from a geopolitical angle requires assessing its performance outside the EU and, in so doing, contributing to the decentring of European cultural and media policy research (echoing Keukeleire & Lecocq, 2018). This shifts the attention away from the links between the EFI and the (economic, cultural and industrial) integration of the EU towards the contribution of the EFI to international cultural diversity and to the global governance of the audiovisual sector. The analysis is mostly based on a desk review of industrial and policy official documents focused on the six film industries surveyed. However, the first three case studies also include insights arising from 20 interviews with film professionals developed in late 2023 and early 2024.

The chapter's examination of the global distribution of the EFI as a central dimension of its competitiveness is not compatible with the traditional understanding of this term. The literature on this topic tends to be aligned with the comparative advantage theory, according to which countries will export goods when (namely) their output per worker is higher, and with the Armington model (1969), which assumes that consumers are potentially interested in consuming some of the goods that are produced by a different country if their prices are competitive. Rather, considering the EFI and its competitiveness from a geopolitical angle adds a

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new dimension to the analysis of its values that goes beyond the importance of market outputs, labour productivity, price elasticity, and consumer preferences. Similarly, competitiveness analyses of the film industry tend to be aligned with Porter's diamond model (1990), which identifies variables that can be used by firms to understand the reasons why some markets or states are more competitive than others and thus a good investment for distributors. The dimensions that compose this model, such as strategy, structure and rivalry, related industries, demand conditions and factor conditions, including state policy, do not explicitly include the issue of values. In a time of heightened value-laden geopolitical conflict, expanding the framework of competitiveness and the principles that underlie it is fundamental to understand the role of the EFI in this context.

To do so, however, it is first necessary to gather evidence enabling an understanding of the particular ways in which, on the one hand, the EFI is present in specific markets beyond the borders of the EU and, on the other hand, to what extent its presence and performance relate to local industrial and other needs. This chapter contributes to addressing this gap. It does so by mapping the circulation and consumption of film in six case studies: Argentina, Brazil and Mexico; South Korea; South Africa; and Turkey. This analysis allows the authors to identify several general principles to strengthen the international circulation of European films in the future.

This methodological approach reflects the link between mutual understanding on the one hand and the aim of strengthening the role of the EU as a global actor in a sustainable manner on the other hand (Dâmaso, 2026), which is made explicitly in the Strategy for International Cultural Relations (European Commission, 2016). Moreover, it also contributes to decentring European film studies and European cultural and media policy, and to questioning common understandings of Europeanness as a neocolonial enterprise of cultural dissemination that would oppose and constrain the industries and cultural communities of non-EU countries. Rather, a more flexible and porous understanding of Europeanness—and, thus, of the EFI—emerges from this analysis. A extensive and in-depth discussion of these issues is developed in Dâmaso et al. (2025).

THE ARGENTINIAN, BRAZILIAN, MEXICAN, SOUTH AFRICAN, SOUTH KOREAN AND TURKISH FILM MARKETS

Latin America is a key region to understand how the European Film Industry is perceived due to its strong cultural historical and linguistic ties with European countries, like Spain and Portugal and to a lesser extent France, Italy, Germany and the Netherlands. It is also an important region in the global film market, hosting prominent international film festivals such as the Mar del Plata International Film Festival in Argentina—classified by the International Federation of Film Producers Associations (FIAPF) as Category A, and the Guadalajara International Film Festival in Mexico. The three Latin American countries chosen (Argentina, Brazil and Mexico) are the largest film markets in the region, have worldwide recognised industries and account for more than 80% of Latin America's fiction films.

Argentina

The third-largest film market in Latin America, Argentina, has a vibrant and dynamic film industry recognised for its creativity and cinema production. The country annually produces around 200 films and boasts a cinema network comprising 943 screens (European Audiovisual Observatory, 2023). It is also home to the most important international film festival and market in the region, the Mar del Plata International Film Festival—classified by the International Federation of Film Producers Associations (FIAPF) as Category A and Ventana Sur—the main Latin American film market organised by National Institute of Cinema and Audiovisual Arts (INCAA) in partnership with the Cannes Film Festival and the support of the MEDIA Program.

Argentina has strong historical, cultural and linguistic ties with European countries, such as Spain and to a lesser extent France, Italy, Germany and the Netherlands. It has traditionally participated in several co-productions with European countries—some of them receiving funding from various European and Latin American funds.

In 2022, about 34.5 million tickets were sold (Table 11.1), generating ARS 20.14 billion (USD 158.1 million), a remarkable recovery from the 2021 figure of 14 million admissions. Argentinian film production seems to be on its pre-pandemic growth track. Out of the 424 films screened in 2022, 230 were Argentinian (that is 54.2% of the total), 90 were American

Table 11.1 General data—Argentina

<i>General data</i>	<i>2022</i>
Population (million)	46,3
Total area (km ²)	2.791.810
Official language	Spanish
GDP per capita (M USD)	13.622
Gross box office ^e (M USD)	158,1
Admissions (million)	34,5
Average ticket price (USD)	4,6
Average admissions per capita ^e	0,7
Screens	943
National market share	8.1%
US market share	83.4%
European market share	3.8%

Note: Data from *Focus 2023: World film market trends* by European Audiovisual Observatory (2023) Copyright 2023 by European Audiovisual Observatory, for total area from argentina.gob.ar—(n.d.) <https://www.argentina.gob.ar/pais/territorio/extension> and for market share from INCAA (n.d.-a) <http://fiscalizacion.incaa.gob.ar/>

(21.2%) and 67 were European (15.8%), being the remaining productions from other countries (INCAA, 2022).

Concerning cinema attendance in Argentina (Tables 11.1 and 11.2), in 2022 European titles captured a market share of 3.8% (1,331,782 tickets), domestic titles took 8.1% (2,791,293 tickets) while US titles accounted for 83.4% of the market (28,794,523 tickets). Excluding “GB inc/US films”¹ European films generated 708,217 admissions, which was 2% of the total market share. It’s also worth noting that the top-grossing local title for 2022, *Mitre, Argentina, 1985* (Santiago Mitre, 2022), was produced with the participation of Amazon Studios and distributed globally via Prime. It accounted for nearly half of all tickets sold for domestic productions, totalling 1,089,066 admissions.

Brazil

The ninth global market (European Audiovisual Observatory, 2023) when it comes to the number of admissions, Brazil, is the second-largest film

¹ “GB inc / US is a film produced in the United Kingdom (UK), for which the main producer is a United Kingdom-registered company, wholly or partially owned or controlled by a US company” (European Audiovisual Observatory, 2017).

Table 11.2 European films (single origin) released in 2022—Argentina

<i>Country (single origin)</i>	<i>Tickets sold</i>	<i>Films released</i>
United Kingdom ^a	820.017	16
France	42.448	7
Spain	121.110	7
Italy	6.253	3
Denmark	6.018	2
Finland	49.881	1
Poland	5.522	1
Germany	2.795	1
TOTAL	1.054.044	38

Note. Own elaboration with data for number of films released from INCAA (n.d.-b) <http://fiscalizacion.incaa.gob.ar/> and for film country of origin from Lumière database (Lumière, n.d.)—<https://lumiere.obs.coe.int/search#>

^a Includes GB inc / US films. If these titles are excluded, the UK had 13 films released and 196.452 tickets sold. The three films included are: *Downton Abbey: A New Era* (Curtis, 2022), *Fantastic Beasts: The Secrets of Dumbledore* (David Yates, 2022) and *The King's Man* (Matthew Vaughn, 2021)

market in Latin America. It has one of the most productive film industries in the region and after recent setbacks, its film funds have increased considerably. Similarly to what can be seen in Argentina, the country has a strong connection with the European continent, particularly Portugal, as both countries share a common language and a deep historical geopolitical relationship. Portugal is one of Brazil's biggest co-production partners.

In 2022, Brazil experienced a gradual recovery in selling 95.3 million tickets (Table 11.3); an 82% rise when compared to 2021 figures but below pre-pandemic numbers (177.7 million in 2019). The number of screens in Brazil also increased that same year, with 3415 screens operating. Of the 385 films released in 2022, 173 were domestic productions (44.9%), 80 were from the USA (20.7%) and 109 were from Europe (28.3%), with the remainder being from other countries (Ancine, 2022). In relation to cinema attendance, domestic films captured a market share of 4.2% (4,032,508 tickets), US productions captured 84.1% (79,965,961 tickets) while European movies took 5.9% (4,937,240 tickets) (Table 11.3). Omitting “GB inc/US” films from European films, the market share drops to 2.2% (2,158,323 tickets) (Table 11.4).

Table 11.3 General data—Brazil

<i>General data</i>	<i>2022</i>
Population (million)	213,9
Total area (km ²)	8.510.417,771
Official language	Portuguese
GDP per capita (M USD)	8.857
Gross box office ^e (M USD)	352,2
Admissions (million)	95,1
Average ticket price (USD)	3,7
Average admissions per capita ^e	0,4
Screens	3401
National market share	4.2%
US market share	84.1%
European market share	5.9%

Note. Data from *Focus 2023: World film market trends* by European Audiovisual Observatory (2023), Copyright 2023 by European Audiovisual Observatory, for total area from IBGE (n.d.)<https://www.ibge.gov.br/cidades-e-estados> and for market share from Ancine (n.d.)—<https://www.gov.br/ancine/pt-br/oca/cinema->

Table 11.4 European films (single origin) released in 2022—Brazil

<i>Country (single origin)</i>	<i>Tickets sold</i>	<i>Films exhibited</i>
France	92.136	30
United Kingdom ^a	2.921.783	7
Germany	1.489	3
Spain	659.816	5
Portugal	570	3
Finland	76.757	1
Poland	24.209	1
TOTAL	3.776.760	50

Note. Own elaboration with data for number of films released from Ancine (n.d.)—<https://www.gov.br/ancine/pt-br/oca/cinema-> and for film country of origin from Lumière database—<https://lumiere.obs.coe.int/search#>

^a Includes GB inc / US films. If these titles are excluded, the United Kingdom had 4 films released and 142,866 tickets sold. The three films included are *Downton Abbey: A New Era* (Curtis, 2022), *Fantastic Beasts: The Secrets of Dumbledore* (David Yates, 2022) and *The King's Man* (Vaughn, 2021)

Mexico

The biggest cinema market in Latin America, Mexico, takes fourth place worldwide when it comes to admissions—ahead of Brazil, despite having a smaller population (Table 11.5). It hosts a prestigious international film

Table 11.5 General data—Mexico

<i>General data</i>	<i>2022</i>
Population (million)	130,1
Total area (km2)*	1,960,646.7
Official language	Spanish
GDP per capita (USD)	10.948
Gross box office (M USD)	571,5
Admissions (million)	173,0
Average ticket price (USD)	3,3
Average admissions per capita	1,30
Screens	7.410
National market shares	3.5%
US market share	88.82%
European market share	3.66%

Note. Data from *Focus 2023: World film market trends* by European Audiovisual Observatory (2023) Copyright 2023 by European Audiovisual Observatory, for total area from INEGI (n.d.)—<https://www.inegi.org.mx/app/areasgeograficas/> and for market share from Statistical Yearbook of Mexican Cinema 2022, IMCINE (2022)

festival—the Guadalajara Film Festival each year—and it is one of the largest markets in the world for film exhibition, ranking fourth in the number of screens worldwide with 7410 screens. In the same way as the other two Latin American countries studied, Mexico also has a significant historical, linguistic and cultural bond with European countries, but it is also a nation tied to their relationship with the USA.

A total of 396 films were released in 2022: 88 from Mexico (22.2%), 103 from the USA (26%), 129 from Europe (32.6) and the remaining ones from other countries (IMCINE, 2022). Cinema attendance grew by 53.7% selling 173 million tickets in 2022, with domestic films taking 3.6% of the market share (6,188,725 tickets), the USA representing 88.9% (153,738,903), Europe accounting for 3.7% (6,342,888), Latin America capturing 0.1% (205,975) and other countries reaching 3.7% (6,612,704) (Table 11.6).

South Africa

Although the South African film industry is growing steadily with an industrial structure aligned with the American model, namely in terms of consolidation and vertical integration (Campbell, 2000), it remains mostly a producer for the global film industry (Barnard & Tuomi, 2008). This

Table 11.6 Ticket sales and films released in cinema complexes in 2022 by country/region of origin—Mexico

<i>Country/region</i>	<i>Tickets sold</i>	<i>%</i>	<i>Films released</i>
Mexico	6.188.725	3.57	88
Mexico	3.771.766		63
Mexican Co-production	2.416.859		25
United States of America	153.738.903	88.82	103
USA	147.261.972		91
USA Co-production	6.476.931		12
Europe	6.342.888	3.66	129
Spain	1.301.874		20
France	1.016.438		44
United Kingdom	1.685.020		16
Germany	145.792		9
Other Europe	2.193.764		40
Latin America	205.975	0.12	23
Other Countries	6.612.704	3.82	53
TOTAL	173.089.195	100%	396

Note. From Statistical Yearbook of Mexican Cinema 2022, IMCINE (2022). Copyright 2022 by IMCINE

suggests that there is space for stronger ties between this market and the EFI, and for utilising each other's strengths to further cultural diversity.

South Africa is the biggest cinema market in Africa and the forty-fifth worldwide when it comes to theatre admissions. With a population of almost 60 million people (Table 11.7) and more than 800 screens across more than 70 complexes, the market is growing, both in terms of ticket sales and audiences. Market revenue was expected to reach US \$85.26 m South African Rand (Statista, 2024a). Moreover, the industry has been growing steadily and some describe it as a new film industry giant (Saul, 2020). Domestically, Gauteng, the Western Cape, and KwaZulu-Natal continue to be the main nodes of industrial activity (NFVF, 2022). This has resulted in the production of award-winning documentaries, films, TV series and commercials. Among the best-known internationally are *Hotel Rwanda*, *Lord of War*, *Yesterday*, *Blood Diamond* and *Invictus* (Table 11.8).

Table 11.7 General data—South Africa

<i>General data</i>	<i>Figures</i>
Population (million)	62 (2022)
Total area (km ²)	21.22
Official languages	Sepedi, Sesotho, Setswana, siSwati, Tshivenda, Xitsonga, Afrikaans, English, isiNdebele, isiXhosa and isiZulu
GDP per capita (USD) ^b	6766.5
Gross box office (million R) ^a	126,6
Admissions (million)	34,5
Average ticket price (USD)	4,6
Average admissions per capita	0,7
Screens	800+
National market share ^a	4% (2021)

^a NFVF (n.d.-b)^b The World Bank (2022)**Table 11.8** TOP 10 films in 2021—South Africa

<i>Title</i>	<i>Country</i>	<i>Director</i>	<i>Distributor</i>	<i>Box office (R)</i>
Spider-Man: No Way Home	US	Jon Wats	FilmFinity	76,385,071
No Time to Die	US, UK	Cary Joji Fukunaga	UIP	24,282,779
Sing 2	US, France, Japan	Garth Jennings	UIP	18,209,724
Fast & Furious 9	US	Justin Lin	UIP	13,593,892
Encanto	US	Byron Howard, Jared Bush	FilmFinity	11,444,452
The Eternals	US	Chloé Zhao	FilmFinity	11,131,090
Godzilla vs. Kong	US	Adam Wingard	Empire Entertainment	11,062,868
Shang Chi and the Legend of the Ten Rings	US	Destin Daniel Cretton	UPI	11,016,546
Venon: Let There Be Carnage	US	Andy Serkis	Ster-Kinekor Pictures	10,268,541
Dune	Hungary, Jordan	Denis Villeneuve	Empire Entertainment	7,455,016

*Source: Authors based on information from NFVF (2021, 6) and Box Office Mojo (n.d.)

South Korea

Over the past few decades, South Korea has emerged as a powerful actor in the global film industry that not only captivates domestic audiences but also achieves widespread international acclaim. This phenomenon, often referred to as the Korean Wave or “Hallyu,” underscores its significance in the global film market, opening opportunities for further dialogues with the EFL.

The country, covering a geographical area of 100,378 square kilometres, with a population exceeding 51 million counts with 3254 cinema theatres (International Trade Administration, 2024), has the world’s highest attendance per capita of 4.39 in 2019 (Korean Film Council, 2023). South Korea has developed a robust and technologically advanced film sector, characterised by substantial domestic box office revenues and a wide range of film productions. According to MPAA (2020) South Korea has the fourth largest market in the world in terms of box office revenues and in Southeast Asia, Korean-language content was “the largest consumed video content category” (Vlassis, 2022). Initially dominated by foreign cinematography, especially Hollywood/United States (Ryoo, 2008), the South Korean film market underwent a remarkable transformation to reclaim and increase its market share (Lee, 2019). This shift was driven by a combination of government policy changes and significant internal reforms, which promoted competitive market forces and global integration, especially in the liberalisation of film distribution and production sectors (Parc, 2017). The result was a significant increase in the market share of South Korean films, both domestically and globally, marking a notable turnaround from its earlier years of foreign dominance.

Turkey

The Turkish film industry, a powerhouse and one of the largest film producers globally in the 1960s and 1970s, experienced a revival in the 2000s. By 2014, it was the second-largest European growth market and the seventh-largest European theatrical market (European Audiovisual Observatory, 2014). As a member of Eurimages and an associate partner of the European Union, it has a symbiotic relationship with Europe (Behlil, 2012).

With a population exceeding 80 million, Turkey boasts a vibrant film industry catering to diverse tastes and preferences, with an annual average

of 38 million tickets sold between 2018 and 2023 (Box Office Türkiye, 2023). Although there was a decline in this rising profile during the pandemic due to the closure of cinemas, in 2021, after the restrictions were lifted in July, the market started to recover and 201 new films were released in theatres. Among those, 78 were local productions (İKSV, 2022). Turkish audiences strongly prefer local films; the country ranked first among the countries affiliated with UNIC (European Union of Cinematographers) in domestic market share, with local releases exceeding 50% of ticket sales in the last twenty years (Sakar, 2022a). In 2022, 371 movies were released and the number of viewers doubled in 2022 compared to the previous year, exceeding 36 million ticket sales (TÜİK, 2023). While annual admissions showed an initial post-pandemic recovery in 2022, subsequent years reveal a fluctuating and ultimately declining trajectory. By 2025, total yearly ticket sales had fallen to approximately 27.9 million, leaving the market stranded at less than half of the 59 to 70 million admissions regularly achieved prior to the pandemic (Box Office Türkiye, 2026). Turkey's special and somewhat precarious relationship with Europe is also reflected in its filmmaking relations, in particular co-productions. As a member of Eurimages since 1990, Turkish filmmakers have long been involved in co-productions with their European counterparts. This relationship is explored further below.

HOLLYWOOD'S DOMINANCE AND THE LACKLUSTRE PERFORMANCE OF EUROPEAN CINEMA

Argentina has a rich historical connection with European cinema, evidenced by its participation in bilateral co-production treaties with Spain, France, Germany and Italy (INCAA, n.d.-c) and initiatives like the Ibermedia² Program, fostering audiovisual cooperation between Latin America and select European nations. European cinema enjoys recognition in Argentina for its quality, with classic German, Italian, French and Spanish filmmakers being widely revered among local cinephiles. However, contemporary European films face considerable challenges in gaining traction within the Argentine audiovisual market. This difficulty primarily

²The Ibermedia Programme is a pan regional initiative that supports the development, co-production and distribution of audiovisual projects among Spanish and Portuguese-speaking countries of Latin America, Spain and Portugal. Italy joined the Program in 2016 and left in 2024. See: www.programaibermedia.com

stems from the dominant presence of American distributors, the majors (UIP: United International Pictures, Disney, Warner Bros), that prioritise Hollywood blockbusters and other films with significant commercial potential, including local productions aimed at the domestic market. In 2022, three majors accumulated a market share of 89.3% of admissions.

Another fact worth noting is that multiplex cinemas, which collectively comprise nearly 50% (Diéguez Coba, 2022) of the country's screens and 57.8% (INCAA, 2022) of cinema attendance, organise their exhibition calendar according to the majors' releases, leaving independent distributors, who handle most Argentine and European films, to schedule their screenings based on the remaining available slots. The screen quota prescribed by INCAA, mandating a minimum release of national films each quarter and continued screenings if a minimum audience threshold is reached during the week, further restricts the opportunities for screenings of European and other foreign films in Argentina. Interviews with audio-visual industry professionals, conducted during December 2023, revealed that some independent distributors located in different countries are attempting to overcome these limitations by establishing partnerships to acquire films with rights across Latin America, subsequently dividing distribution responsibilities as per their respective territories. This collaborative approach enables them not only to buy films at a better overall price compared to individual rights purchases for each distributor's respective region and enhance their leverage when negotiating with film producers but also use digital aggregators to commercialise films to niche streaming services, expanding the reach of these productions in the region.

As for Brazil, European cinema has been historically recognised and enjoyed in it, with French, Italian, German and Spanish directors being well regarded by local cinephiles. Similarly to what is observed in Argentina, European films also circulate in a non-commercial circuit, with several events and festivals organised by European embassies and cultural institutions destined to promote European productions. Some of the most notable ones are Festival Varilux de Cine Frances, Semana da Europa, FestiFrance, Festival de Cinema Italiano, Mostra de Cinema Alemão: *Elas dirigem!*. Brazil also holds a close relationship with the European Film Industry through co-productions, having bilateral co-production agreements with Germany, Spain, France, Portugal, Italy and the United Kingdom. In addition, Brazil is also a part of the Ibermedia Program and the Latin American Film Co-production treaty that includes Spain. According to data from Ancine (2022) Brazil released 37 co-productions

in 2022; out of those, 9 were with Portugal, followed by France (5) and Germany (3).

European cinema is also well regarded among Mexican cinephiles and there are a number of festivals, showcases and events exhibiting European films. Some of the more prominent ones include Festival de Cine Europeo and Tour de Cine Francés, the latter in partnership with the main exhibitor in Mexico, Cinépolis. Furthermore, Mexico has co-production bilateral agreements with Spain, France and Switzerland and also participates in the Ibermedia Program. Of the 25 co-productions released in 2022, 9 were European—Spain (3), Switzerland (1), Italy (1).

The South African film industry remains mostly a production hub—estimated to be 94.6% of the industry's value chain. This is because the industry remains dependent on American partners, even though the use of English in the country supports competition with productions from Canada, Australia and New Zealand. Five majors—Universal, Disney, Warner, Sony and Paramount—accounted for 87.2% of the box office market share in 2022, whereas the leading films in 2023 in terms of admissions confirm the importance of international studios in the market, such as Paramount Pictures, Universal Pictures, Times Media Films, or United International Pictures (Mojo, 2023). This is not a recent trend. Data with the yearly box office leaders since 2002 demonstrate the importance of Hollywood productions in the South African market (Mojo, 2024). These findings are echoed in research focused on the perceived needs of the industry by its professionals, which highlight the need for partnership initiatives to sustain the local content ecosystem (NFVF, 2022a, p. 4) as well as funding (18%) and support in terms of marketing/distribution (16%) (NFVF, 2022a, p. 8). As for the market's characteristics, in 2021 (January–September), 104 films were released in the country – of which 9 were produced locally. Four of these films were independently released and three were State Theatre productions. Altogether, the national market share in the same year was 4%, with domestic productions unable to reach the top of box office tables (Table 11.8). In this contextmarket, the presence of European productions is also extremely limited.

South Korean cinema maintains a substantial and consistent market share (Fig. 11.1). The shift observed in 2020 and 2021, marked by South Korean films initially holding a dominant share of 68% and subsequently declining to 30.10%, despite a rise in domestic film releases, underscores the significant influence of the COVID-19 pandemic. The close

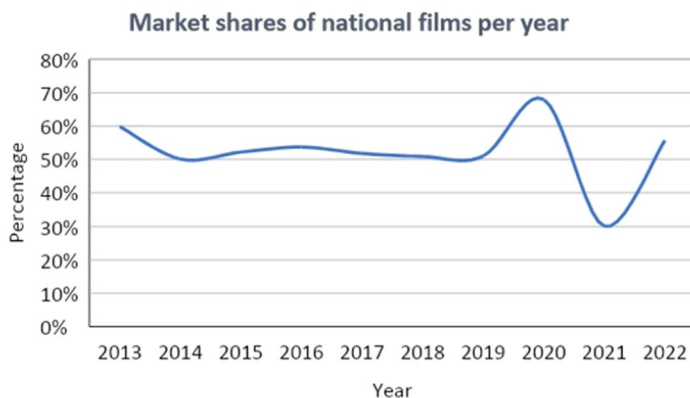


Fig. 11.1 Market share of South Korean films from 2013 to 2022. Source: Authors based on European Audiovisual Observatory (2013–2023)

examination of the TOP 10 films released in South Korea in the last decade, from 2013 to 2022 based on admission, revealed the dominance of South Korean and Hollywood/US movies (Table 11.9). The top thirty films in South Korea show a strong presence of local productions, with a considerable number of Hollywood/US films (Fig. 11.2). This list includes co-productions such as *Interstellar* (US/GB), *Bohemian Rhapsody* (US/GB) and *Snowpiercer* (US/KR/FR/CZ), a sci-fi film based on a French novel and directed by Bong Joon-ho. This pattern over a decade emphasises the dominance of South Korean movies and North American ones, while highlighting the comparatively very limited presence of European cinema in South Korea.

Finally, Turkey presents a box office portrait that is somewhat similar to that of South Korea. Local films and Hollywood blockbusters dominate ticket sales. Nonetheless, due to the country's geographical proximity and cultural ties to Europe, European films had significant theatrical releases in Turkey. However, the number of releases does not tend to translate into box office success. Specifically, 13% of the films released in 2022 were European productions, constituting only 1% of ticket sales. In 2023, European film theatrical releases rose to 15.24% and European film ticket sales doubled, reaching 2% of all ticket sales. Considering the increasing number of European films released, the relationship between EFI and the Turkish film industry has a positive outlook for the future.

Table 11.9 TOP 30 films from 2013 to 2022—South Korea

<i>Title</i>	<i>Country</i>	<i>Director</i>	<i>Distributor</i>	<i>Admissions</i>	<i>Date</i>
Roaring Currents	KR	Han-min Kim	CJ Entertainment	17,611,849,00	2014
Extreme Kob	KR	Byeong-heon Lee	CJ Entertainment	16,265,618,00	2019
Avengers: Endgame	US	Anthony Russo, Joe Russo	Walt Disney	13,934,592,00	2019
Veteran	KR	Seung-wan Ryoo	CJ E&M	13,414,009,00	2015
Frozen 2	US	Chris Buck, J. Lee	Walt Disney	13,169,079,00	2019
Miracle in Cell No. 7	KR	Lee Hwan-kyung	Next Entert. World	12,810,515,00	2013
Assassination	KR	Dong-hoon Choi	Showbox	12,705,700,00	2015
Beomjoidosi 2	KR	Sang-yong Lee	ABO, Plus M	12,693,302,00	2022
Aladdin	US	Guy Ritchie	Walt Disney	12,552,283,00	2019
Along with the Gods: The Last 49 Days	KR	Yong-hwa Kim	Lotte Entertain.	12,274,996,00	2018
A Taxi Driver	KR	Hun Jang	Showbox	12,186,327,00	2017
Train to Busan	KR	Yeon Sang-ho	Contents Panda	11,565,479,00	2016
Avengers: Infinity War	US	Anthony & Joe Russo	Walt Disney	11,212,710,00	2018
Avengers: Age of Ultron	US	Joss Whedon	Walt Disney	10,494,499,00	2015
Frozen	US	Chris Buck, J. Lee	Sony Pictures	10,296,101,00	2014
Interstellar	US/GB	Christopher Nolan	Warner Bros.	10,105,274,00	2014
Parasite	KR	Bong Joon Ho	CJ Entertainment	10,085,275,00	2019
A Violent Prosecutor	KR	Lee Il-hyung	Showbox	9,707,581,00	2016
Exit	KR	Sang Geun Lee	CJ Entertainment	9,426,011,00	2019
Snowpiercer	KR/US/FR/CZ	Joon-ho Bong	CJ Entertainment	9,341,572,00	2013
Bohemian Rhapsody	US/GB	Bryan Singer	Twentieth Century	9,224,587,00	2018
The Face Reader	KR	Jae-rim Han	Showbox/Mediaplex	9,134,386,00	2013

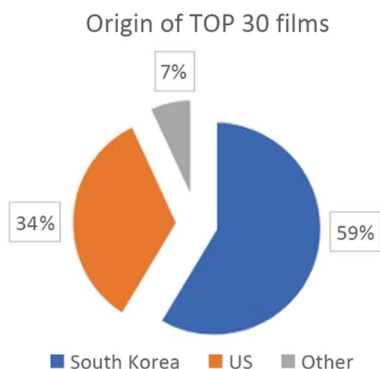
(continued)

Table 11.9 (continued)

<i>Title</i>	<i>Country</i>	<i>Director</i>	<i>Distributor</i>	<i>Admissions</i>	<i>Date</i>
Iron Man 3	US	Shane Black	Sony Pict./Walt Disney	9,001,309,00	2013
Ode to My Father	KR	JK Youn	CJ E&M	8,911,437,00	2015
Captain America: Civil War	US	J. Russo, A. Russo	Walt Disney	8,677,249,00	2016
The Pirates	KR	Seok-hoon Lee	Lotte Entertainment	8,665,652,00	2014
Miss Granny	KR	Dong-hyuk Hwang	CJ Entertainment	8,656,417,00	2014
Along with the Gods: The Two Worlds	KR	Yong-hwa Kim	Lotte	8,539,572,00	2017
Top Gun: Maverick	US	Joseph Kosinski	Lotte	8,177,446,00	2022
Spider-Man: Far from Home	US	Jon Watts	Walt Disney	8,021,145,00	2019

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

Fig. 11.2 Origin of TOP 30 films from 2013 to 2022—South Korea.
Source: Authors based on European Audiovisual Observatory (2013–2023)



As remarked upon before, the Turkish film industry has been a major partner in co-productions with European countries. Since the country's only funding mechanism for independent films is limited to partial support, started in 2005 and offered by the General Directorate of Cinema (a subsidiary of the Ministry of Culture and Tourism), receiving European funds is crucial for Turkish arthouse cinema. In 2021, the ministry funded the production of 42 films which is an insufficient number considering the country's production scale. Overall, only 18% of the 600 films produced between 2017 and 2021

received partial support from the Ministry (Akçalı, 2023). In this regard, while mainstream production companies release popular films with expected commercial returns, Turkish independent filmmakers search for co-production strategies. Eurimages and other European Union cultural funds are the primary sources for these filmmakers. Experienced producers from Turkey who have worked in co-productions recognise the vital importance of European film funds (Şatana & Yücesoy, 2018). From 1990 to 2025, Eurimages supported the production of 108 films in Turkey. These films received awards at important arthouse festivals, including but not limited to Nuri Bilge Ceylan's Palme d'Or winner *Winter Sleep* (*Kış Uykusu*, 2014) and Semih Kaplanoğlu's Golden Bear winner *Honey* (*Bal*, 2010)

In this regard, two well-known international film festivals in Turkey have held co-production platforms and markets. Istanbul Film Festival organises "Meetings on the Bridge," a co-production, training and networking platform that brings producers, directors and scriptwriters from Turkey together with international film professionals. In 2011, "Meetings on the Bridge" initiated the German-Turkish Co-production Development Fund through a collaboration with two regional German funds: Hamburg Schleswig Holstein and Medienboard Berlin Brandenburg. The fund aims to support co-productions between the two countries and supports various German-Turkish co-productions in development every year. Until 2023, the fund supported the production of 67 films (İKSV, 2023). The other co-production market established under the Antalya Golden Orange Film Festival is called Antalya Film Forum. While it received support from Creative Europe to foster co-productions between Turkey and European countries, this partnership is no longer active.

While the European Film Industry plays a vital role in the continuity of arthouse cinema in Turkey, Turkey's national public broadcaster (TRT) has started co-producing European films recently. So far, TRT co-produced *Triangle of Sadness* (Ruben Östlund, 2022), *Klondike* (Maryna Er Gorbach, 2022), *This Must Be Heaven* (Elia Suleiman, 2019) and *Quo Vadis, Aida?* (Jasmila Žbanić, 2020). However, we estimate that these co-productions will not have a major impact on the domestic film industry, as TRT's share in these projects is minor and its visibility remains limited. In addition to these co-productions, TRT provides multiple support awards within the industry sections of the Sarajevo and Karlovy Vary Film Festivals, strategically attempting to establish its presence in the Eastern European film market.

EUROPEAN CINEMA'S CIRCULATION AND CONSUMPTION

Recent assessments of the Argentine audiovisual landscape highlight two primary channels for the circulation of European cinema. Firstly, there's a cultural circuit intertwined with diplomatic efforts, featuring diverse European cultural institutions organising events like European film weeks and exhibitions. My French Film Festival, Espanoramas or the Festival del Cine Alemán are some of the more prominent ones. Secondly, there's a commercial circuit, which, post-pandemic, faces notable hurdles in showcasing European films. Theatrically, recent figures depict a decline in the exhibition of European cinema in Argentina. Regarding television, legacy broadcasters show limited interest in acquiring European movies. However, there is a presence of European television channels, such as *France 24* (France) and *TVE Internacional* (Spain) on Pay-TV. There is also a TV channel dedicated to European films and series called *Europa Europa* owned and distributed by the US-Argentine company AMC Networks International.

The commercial circuit has encountered significant obstacles in showcasing European films in Brazil as well. The main challenge arises from the dominance of US major distributors (Warner, Disney, Paramount, Sony) which, backed up by Hollywood studios, prioritise commercially appealing films, invest heavily in promotion and have an extensive occupancy strategy in the exhibition market, releasing multiple copies of the same title and taking a large percentage of screens. Blockbusters like *Avatar: The Way of Water* (Cameron, 2022) and *Spider-Man: No Way Home* (Watts, 2021), were released in nearly 3000 theatres (Ancine, 2022). Unsurprisingly, the combined audience of the four majors accounts for 88.8% of the market (84.6 million tickets), even though they only released 75 out of the 385 films released in 2022 (Ancine, 2022). Additionally, in the aftermath of the pandemic, exhibitors have focused on franchises and blockbusters to attract a perceived guaranteed audience, further constraining the exhibition space for films from other countries. As for traditional broadcasters, there is minimal interest in showcasing European films. While pay TV has European channels available such as *TVE Internacional* (Spain), *Rai* (Italy), *DW* (Germany) and *RTP Internacional* (Portugal), its numbers have been declining.

Many challenges identified in Argentina and Brazil are also evident in Mexico. A significant degree of concentration can be observed in the Mexican distribution industry, with five majors—Universal, Disney,

Warner, Sony and Paramount—accounting for 87.2% (Canacine, 2022) of the box office market share in 2022. Additionally, the free trade agreement between Mexico, the USA and Canada facilitated Hollywood's access to the domestic market. The exhibition park in Mexico is also highly concentrated, with two Mexican companies accounting for nearly 94% (Canacine, 2022) of the total screens: Cinemex (38.4%) and Cinépolis (54.7%). The latter is the biggest exhibitor in the country and Latin America, being the third largest in the world. In light of this scenario, independent distributors have limited opportunities when showcasing non-major productions. There is not much space for European productions in established media outlets in Mexico, either. Pay-TV has a few European channels available, including *TVE Internacional* (Spain), *Rai* (Italy), *Televisión de Galicia* (Spain) and *Cincomas* (Spain).

In South Africa, European productions also struggle to be distributed and find viewers. At the same time, two festivals by European stakeholders are focused on building audiences: the European Film Festival in South Africa, led by the EU Delegation with several Member States, and the annual IF Cinéma Festival of the Institut Français. Finally, South Africa has co-production agreements with Canada (1997), Italy (2003), Germany (2004) and the United Kingdom (2007), France (2010), New Zealand (2011) and Ireland (2012) (NFVF, n.d.-a). This suggests that the main challenge faced by the EFI in South Africa is shared with that of domestic productions: the market does not support the circulation of culturally diverse films that do not follow the model of Hollywood productions. In this context, European and South African needs and interests are aligned.

In the South Korean market, European films face challenges establishing a strong audience base, with few exceptions. Over the top 100 films during the period 2013–2022, only 13 films are European, all of which are co-productions with the USA (Tables 11.9 and 11.10). A successful EU movie in South Korea was *Snowpiercer*. While it grossed \$4,563,650 in the USA, its earnings were notably higher in France, hitting \$5,306,545. Furthermore, despite featuring a predominantly American cast, it soared to an impressive \$59,802,711 in South Korea (Mojo, 2024). The film garnered 35 wins and a staggering 108 nominations worldwide (Mojo, 2024). In addition, distributed by twentieth Century Fox, a major Hollywood film studio owned by The Walt Disney Studios, *Bohemian Rhapsody*, the biography of British singer Freddie Mercury and its band

Table 11.10 TOP EU movies from 2013 to 2022—South Korea

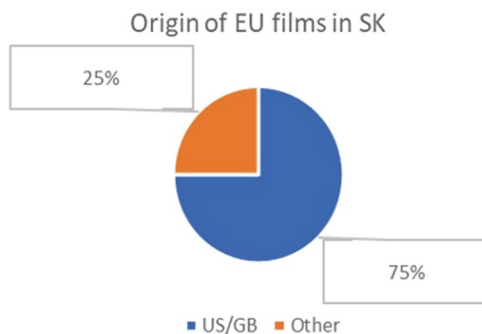
<i>Original title</i>	<i>Country of origin</i>	<i>Director</i>	<i>Distributor</i>	<i>Admissions</i>	<i>Date</i>
Interstellar	US/GB	Christopher Nolan	Warner Bros.	10,105,274,00	2014
Snowpiercer	KR/US/ FR/CZ	Joon-ho Bong	CJ Entertainment	9,341,572,00	2013
Bohemian Rhapsody	US/GB	Bryan Singer	Twentieth Century Fox	9,224,587,00	2018
Mission: Impossible— Fallout	US/CN/ FR/NO	C. McQuarrie	Paramount	6,584,915,00	2018
Kingsman: The Secret Service	US/GB	Matthew Vaughn	Twentieth Century Fox	6,129,681,00	2015
Kingsman: The Golden Circle	US/GB	Matthew Vaughn	Twentieth Century Fox	4,945,484,00	2017
The Martian	US/GB	Ridley Scott	Twentieth Century Fox	4,880,800,00	2015
The Lion King	US/GB	Jon Favreau	Walt Disney	4,743,264,00	2019
Gravity	US/GB	Alfonso Cuaron	Warner Bros.	4,682,418,00	2013
Fantastic Beasts and Where to...	US/GB	David Yates	Warner Bros.	4,662,751,00	2016
Red 2	US/FR/ CA	Dean Parisot	Lotte Entertainment	3,166,425,00	2013
Tenet	US/GB	Christopher Nolan	Warner Bros.	1,992,214,00	2020
Dolittle	US/CN/ GB/JP	Stephen Gaghan	Universal	1,607,082,00	2020

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

Queen has generated \$216,668,042³ in the USA. It was also a success in the UK where it reached \$76,202,268. South Korea followed closely with \$74,187,520. Lastly, *Interstellar*, which was distributed in South Korea by the Hollywood studio Warner Bros, has generated \$188,020,017 in the USA, \$69,290,035 in South Korea and \$60,469,986 in the UK. The majority of films analysed (Fig. 11.3), are joint ventures between the USA and GB, with a few being collaborations between the USA, France, Norway, Czechia and South Korea, such as *Snowpiercer*. This data

³This and the following numbers, corresponds to the lifetime gross box office and were retrieved on Box Office Mojo.

Fig. 11.3 Origin of the most successful EU films from 2013 to 2022—South Korea.
Source: Authors based on European Audiovisual Observatory (2013–2023)



underscores the absence of films exclusively produced by European studios, evidencing the pronounced dominance of US/Hollywood involvement in these co-productions and their worldwide distribution.

As for Turkey, in addition to theatrical releases, its audiences watch examples of European cinema at various festivals and film days held throughout the year. Organised for the twenty-second time this year, *Filmekimi* is one of the popular cinema events, screening a selection of primarily European films that had their world premieres at prestigious festivals from Cannes to Venice, Berlin to Toronto. Within the scope of this event, 31 European films in 2022 and 28 European films in 2023 were shown. Moreover, consulates of various European countries also organise film days throughout the year. The Institut Français de Turquie and Goethe-Institut organise “Francophone Film Days” and “Film Kino Week” respectively. Furthermore, *Istanbul Modern*, a contemporary art museum, with the support of European consulates, including Hungary, Poland, Slovakia, Czech Republic and others, holds film screenings of European films around specific themes. In addition to these initiatives, the EU delegation of Turkey supports the organisation of two film festivals, “European Cinema Week” and “European Union Human Rights Film Days and Short Film Competition.”

SVODs: NEW PLATFORMS, SIMILAR TRENDS

In Argentina, the emergence of video-on-demand services, notably driven by US-based global streamers, has significantly altered viewing habits. These streamers have garnered substantial attention and viewership, impacting traditional cinema consumption patterns in Argentina. Based

on information from OBITEL (Sánchez Vilela & Kirchheimer, 2023), Netflix is currently the leading VoD service, holding a market share of 25%, closely followed by Prime (22%), Disney+ (13%), HBO Max (10%) and Paramount+ (6%). Moreover, a public VoD service, Cine.Ar Play, was created to help promote and circulate Argentinian films.⁴

Brazil is one of the biggest markets for streaming services in the world, with 137 options (AIC, 2023) currently available. Regarding its content, the article states that a recent study by BB Media, DEG International (e BASE) found that the vast majority of offerings across all services come from the USA with over 20,000 titles; followed by India (4877), the United Kingdom (3571), France (291) and Brazil (2556). Streaming services continue to take charge with 31.2 million subscribers (Statista, 2024a,b), almost a third of total subscribers in Latin America. Despite the lack of reliable information, Globoplay, a local VoD by lead Brazilian Grupo Globo, appears to surpass Netflix regarding the number of users (Statista, 2023). Globoplay leads with 30 million users, Netflix follows with 15.3 million, Disney+ with 8 million and HBO Max with 3.8 million. When it comes to higher user penetration, Netflix ranks first with 29%, followed by Prime with 22%, Disney + with 12% and Globoplay with 11% (TodoTVNews, 2023).

In Mexico, concerning SVoD, US streaming services control the market. In 2021 Netflix held a market share of 61.1% followed by Disney+ with 12.8%, HBO Max with 10.3% and Prime with 7.6% (Egeda, 2023). FilminLatino, created in partnership with Filmin Spain to offer Mexican and international cinema, also operates in the country. Two streaming services entered the Mexican market in 2022: Vix+ and Mubi, while Europa Mas, a streaming service specialised in European content, ceased in December 2023. The service Vix+ (SVoD) isn't exactly new since it's a merger of BlimTV, VIX, UnivisionNow and PrendeTV. It is also owned by TelevisaUnivision (being Televisa the largest Mexican broadcaster).

In South Africa, television channels remain more important than VoD platforms but, among the latter, US streaming services have the highest audience share. In 2019, Netflix led with 67.9%, Amazon Prime with 9.2% and Hulu with 9.2% of audiences (Statista, 2022). The few exceptions with a high percentage of content from Europe used to be BritBox, a partnership between the BBC and ITV that offered UK television shows and movies, and MUBI, which remains available in the territory. Interestingly, the South African market is the focus of attention from

⁴For more information, see Albornoz & Krakowiak, 2023.

media conglomerates from several world regions, as is suggested by the presence of the Indian streaming service Eros Now as well as VIU, owned by PCCW Media Group – a subsidiary of PCCW, a Hong Kong-based telecommunications and media company –, showcasing drama series, variety shows and movies from countries such as South Korea, Japan, China and Taiwan. For now, the transition to VoD is making more content available to viewers without, however, contributing to its diversification. This questions the suggestion made by Netflix in a report about its investment in South Africa, Nigeria and Kenya that the availability of a high number of film and TV productions is associated with cultural diversity (2023, p. 1). Rather, the platform's references to diversity could be understood as a corporate communication strategy that allows it to defend and maintain its competitive advantage (Asmar et al., 2023). In reality, domestic, independent and art house productions are mostly available through MUBI, which reaches a relatively small number of viewers. Again, the South African film industry and the EFI share similar challenges locally, which they could work collaboratively to address.

In South Korea, the available data on Internet Protocol television (IPTV) and digital cable TV evidenced a pattern similar to that of theatrical releases. Analysing the same period, from 2013 to 2022, market share was disputed between South Korea, with 43.2% and the USA with 40.9%, with Japan also having an expressive share of 6.6% (Fig. 11.4). The presence of European content was minor, with the most prominent country being the UK, responsible for 2% of the market share, followed by France with 1.3% (Table 11.11).

Similar to South Africa, television channels and television series in Turkey maintain importance compared to digital streaming services. In parallel with global trends, the use of IPTV and the number of digital platform memberships are increasing, which is projected to continue.

Fig. 11.4 Market share in IPTV and digital cable TV from 2013 to 2022—South Korea.
Source: Authors based on VKOBIS (n.d.)

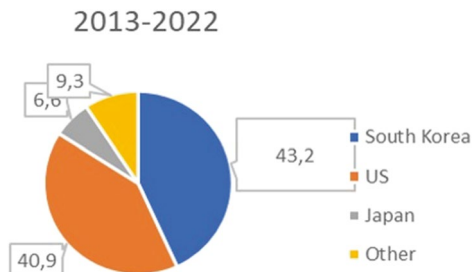


Table 11.11 Presence of European countries in IPTV and digital cable TV from 2013 to 2022—South Korea

<i>Nationality</i>	<i>Number of works</i>	<i>Number of online uses</i>	<i>Market share (%)</i>
United Kingdom	1220	10,196,805	2.0
France	1243	6,712,097	1.3
Germany	499	2,158,718	0.4
Spain	346	1,825,069	0.4
Italy	345	1,030,253	0.2
Denmark	118	622,436	0.1
Belgium	62	578,152	0.1
Sweden	99	475,988	0.1
Ireland	55	459,491	0.1
Norway	72	441,136	0.1

Source: Authors based on VKOBIS (n.d.)

(Twentify, 2018). By 2018, among the personal purposes of Internet users, the rate of watching television content over the Internet is 40%. In the first three months of 2019, the rate of households owning a smart TV increased to 37.7% (Ateşalp & Başlar, 2020). Analysing available data of film releases on digital platforms (between April 2022 and September 2022), US productions had the highest rate of nearly 42%, followed by Turkish productions at the rate of 20%. However, Turkey's local productions are in first place in the most-watched movies and TV series. European content had a 16% market share. The majority of European content on Turkish digital platforms, 42%, were French productions, followed by films produced in the United Kingdom with 26% (Sakar, 2022b). Although the audience figures are not available, the proportions of European films released in theatres and those released on digital platforms seem similar.

CONCLUSION

The mapping exercise developed in this chapter suggests several common challenges and potential ways to strengthen the international circulation of European films. While Argentine audiences appreciate European cinema's quality and heritage, contemporary European films encounter significant obstacles in gaining visibility and distribution within the country. The dominance of the majors, coupled with evolving viewing trends, driven by digital streaming services, presents challenges for the sustained circulation of European films in the Argentine market. Similarly, European cinema

has been appreciated by Brazilian cinephiles and is known for its rich heritage, but it faces significant challenges in securing a window of exhibition in the local audiovisual market due to the dominance of US companies in distribution, exhibitors' preference for blockbuster releases that are more viable commercially and limited opportunity in other exhibition windows such as open TV and streaming services. Likewise, in Mexico, the main obstacles in terms of showcasing contemporary European films are the highly concentrated distribution and exhibition sectors, proximity and free trade agreement with the USA, that facilitate Hollywood's film insertion and changing viewing habits brought by streaming services which have also further challenged the already restricted space for European productions.

The analysis also revealed the very weak presence of European content in South Africa, where the streaming market—despite being relatively small in comparison with TV services—is dominated by US-based platforms. The low presence of European content is also a characteristic of the South Korean audiovisual market, both in theatrical releases and digital TV. Clearly, the European country with a better performance in this market is the UK, mainly when it extensively co-produces with US majors, indicating, however, an dependence on Hollywood and US-based VoD platforms. The exception lies in Turkey, whose cinematic landscape has significantly evolved over the years, forging a dynamic relationship with the EFI. However, the potential remains for intensified European investment in Turkish films and TRT as a producer, strengthening the cultural exchange between Turkey and EU film stakeholders.

In common, these case studies reveal the weak position of the EFI and the dominance of North American/Hollywood movies in national markets, with the exception of South Korea, where domestic films also circulate significantly. In any case, the ties between these six local film industries and the EFI could be stronger. The exception lies in how Argentina, Brazil, Mexico and Turkey have been involved in co-productions with European stakeholders—namely, to support artistic freedom in the Turkish case. Nonetheless, even in these cases, the existence of co-productions faces the challenge of reaching potential viewers and making commercially viable films. Diplomatic promotion channels such as film festivals supported by EU embassies or delegations are limited and the commercial circuit is characterised by the dominance of US major distributors and, increasingly, US-based VoD platforms.

Based on these findings, the international circulation of European films can be enabled by simultaneous action across several dimensions, namely: increased networking among film professionals through industry market events and film festivals, increased co-production arrangements and funding to support stronger links between the EFI and local producers (simultaneously supporting local ecosystems), sustained marketing efforts to increase the visibility of European film shown in local markets (namely, through VoD providers), and continued efforts in audience formation, thus providing an alternative to Hollywood blockbusters. Moreover, distribution and exhibiting must be highlighted as key to improving the competitiveness of film. There is a need to support local and independent distributors of European films, namely by helping them tailor their promotion efforts to these local markets. However, exhibitors (especially independent ones) also have an important role in this context. Offering them support to keep European films in the commercial circuit seems essential to not only increase their circulation but also take them out of the non-commercial circuit in which they seem to be trapped.

In addition, these efforts should imperatively go hand in hand with the strengthening of an extraverted economic attitude from European professionals towards the international-non European film market. As revealed by preliminary results from interviews with European film professionals,⁵ some European professionals seem to have strongly internalised the dominance of Hollywood/US movies as a stable, unchangeable and recurrent feature in the worldwide film market, including the VoD market. Strengthening the international circulation of European films would enable an imaginative shift in the EFI regarding its worldwide ambitions and strengths.

These recommendations go against current discussions of competitiveness, which focus on short-term assessments of markets based on existing supply and demand logics and would therefore—considering the low demand for European films in most case studies—lead to seeing the markets surveyed as mostly irrelevant foci for a renewed European international film policy and strategy. Rather, the case studies reveal a parallel between the relative lack of demand for European film therein and the dependence of local film industries on Hollywood productions. These

⁵This concluding remark comes from a study of the REBOOT project towards the European film professionals and the ways in which they define “international market” and deal with it. The study involves Antonios Vlassis and Marina Rossato Fernandes.

challenges can (and should) be addressed simultaneously. Supporting local film industries and long-term market-building, thus increasing cultural diversity in these local markets, could be at the core of a two-sided approach to support the international competitiveness of the EFI.

This statement opposes the underlying logic of competitiveness scholarship. Porter writes in his pioneering article that

alliances [...] represent a tempting solution to the problem of a company wanting the advantages of foreign enterprises or hedging against risk, without giving up independence. In reality, however, while alliances can achieve selective benefits, they always exact significant costs [...]. These costs ultimately make most alliances short-term transitional devices, rather than stable, long-term relationships. (Porter, 1990, pp. 90–91)

On the contrary, the mapping exercise developed for this article suggests that, first, it is erroneous to limit the idea of alliances focused on improving competitiveness to the strategies of individual companies; second, the assessment of costs and benefits associated with such alliances is incomplete if it fails to take non-market dimensions into account, such as cultural diversity. This shift in perspective demands changing the logic of competitiveness assessments in spatial and normative terms, that is, to look beyond the borders of the national (or, in our case, EU) borders and focusing on understanding how the idea of *Europeanness* functions in practice, respectively—again, revealing the contemporary relevance of the work of Keukeleire and Lecocq (2018) but now making a jump from the decentring of EU film studies and policy with which this chapter started to the decentring of competitiveness discourse as well. The analytic shift that is being proposed here, which requires further research and analysis, could also contribute to overcoming a Western-centric approach to film policy studies.

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Governance for Competitiveness and Equity in the Canadian Film Industry: Recent Comparisons with the European Union

Alison C. M. Beale

INTRODUCTION

In Canada “competitiveness” in the audiovisual sector has had a niche interpretation for decades. The film and television production industry was worth 11.7 billion Canadian dollars in 2022, or just over 8 billion Euros, but well over half that figure came from the foreign production and production services sector (Telefilm Canada, 2023a). In other words, less than half of film and television production (by dollar value) in Canada is of Canadian film and television. Despite content regulations that require Canadian networks to reserve 50–60 percent of their television schedules for Canadian programming, English-Canadian audiences do not watch Canadian content at anything near this level and Canadian films, despite their numbers, quality and awards, struggle to find audiences in theatres or online. Although there has been a strong recovery for production after the pandemic, both Canadian content and its audience

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remain to all intents and purposes a niche market, except in French-speaking Québec.

Efforts to preserve this niche or even, optimistically, to expand it in the face of digitisation are the focus of legislation passed in 2023, Bill C18 (The Online News Act) and Bill C-11 (The Online Streaming Act). Currently, domestic English-language audiences don't clamour for more (or less) Canadian film and television, or gaming and VR and in many cases might be hard pressed to identify a Canadian production when it is present. Canadian films captured less than five percent of domestic theatrical ticket sales in 2022 (Telefilm Canada, 2023a). This was even as Canadian theatrical releases rebounded in 2022 to a total of 148 films (in French and English) after being almost halved between 2020 and 2021 (Telefilm Canada, 2023a). But 98 percent of films watched by Canadians in 2023 were viewed online.

A similar need to respond to digitisation and the audience move to platform entertainment features in the review of the European Audiovisual Media Services Directive that began in 2018 (European Commission, 2024). The abandonment of film theatres and diminishing audiences for traditional broadcasting threaten European production and its access to national audiences, the European audience and international markets. As in Canada the authority and effectiveness of pan-European policy making is in question. The EU is of course a complex jurisdiction of many nations, languages and both large and very small domestic media production industries and markets. Here too, although on a different scale from Canada and varying by country, Hollywood's century of dominating access to the film audience has long imposed limits on the scope of "competitiveness" for the film industry and its access to domestic and international audiences (Wasco, 1995). Another complication in this period is Brexit which in 2020 saw Great Britain depart the Union. Britain has the largest media production and distribution economy in the European region (\$US 26 billion, or over 24 billion Euros) and nearly eighty percent of its film production activity is for U.S.-based studios (United States International Trade Administration, 2021). The European Commission now has the additional challenge of managing the inclusion or exclusion of British and British-based production as European content (Pollet, 2023).

BACKGROUND TO “CREATIVE CANADA”

The areas of federal responsibility for culture, through the ministry known as the Department of Canadian Heritage, are both broad (promotion of Canadian identity and values and of the French and English languages, cultural development and heritage and multiculturalism) and specific (national museums, galleries, libraries and archives; literature; the visual and performing arts; and visual and audiovisual media, sound recording, film and video) (Government of Canada, [2023](#)). The film, tv, gaming and VR industries are supported by the federal government through the Canada Council for the Arts (the major arts-funding agency) the English and French public broadcaster CBC/Radio Canada, the National Film Board and the funding agencies the Canada Media Fund (to which private broadcasters contribute) and Telefilm Canada. Public and private media are subject to regulations of the Canadian Radio-Television and Telecommunications Commission (CRTC) and there is a suite of federal legislation covering investment regulation for the media, tax credit programmes (which drive much of the international production), training programmes and international co-production. In addition to the CBC/Radio Canada publicly funded television in Canada includes the Aboriginal Peoples’ Television Network (APTN), originally broadcasting only in the Canadian north, which became fully available via cable and Internet across the country in 1999 (Roth, [2005](#)). Altogether over forty public, private and educational networks and stations from large to small are available across the country’s regions.

Canadian filmmakers can obtain support from Telefilm Canada which administered over 158 million dollars in 2022–2023 (Telefilm Canada, [2023a](#)) and television and other creators from the Canada Media Fund, which in 2022–2023 distributed over 160 million dollars across its range of programmes (Canada Media Fund, [2023a](#)).

Canadian provinces and territories offer incentives such as tax credits for film and television production and in some cases for newer fields such as digital animation, visual effects and interactive digital media. Most have their own funding programmes for film and TV although the budgets and scope of these programmes vary greatly (Telefilm Canada, [2024](#)). Toronto, Vancouver and Montreal are the major production centres and offer their own municipal support as do many other medium to large cities. Vancouver is third only to New York and Los Angeles as a film and tv production centre in North America.

Québec is an exceptional case in the Canadian context. With a total Canadian population of over 40 million in 2023, seven million of the eight million Canadians who have French as their first language live in Québec.¹ While a growing number are bilingual and consume some English-language media, the audience figures for French-language broadcasters remain strong. Indeed, while English-language audiences across Canada are ageing and shrinking for both the public and private broadcasters, the French-language audience for traditional media appears to have stabilised after some years of loss, even as the French audience *also* turns to digital delivery (CRTC, 2023a). The differences between French- and English-language audiences are also highlighted dramatically by figures reported by the Canada Media Fund. Of 31 television productions it contributed to in 2022–2023 that reached audiences of over one million, 29 were in French, only 2 in English (Canada Media Fund, 2023a). This great discrepancy indicates two things: the very strong preference in Québec, for domestically produced news, documentaries and entertainment and the underdevelopment of the French-language presence on streaming platforms, a factor in Francophones' higher continued use of legacy media. French-language audiences in Québec have access to publicly and privately funded media that support and reflect a shared identity and institutions to a degree unknown in the rest of Canada. Even as Québec's culture evolves, with the immigration of Francophones from outside Canada, many from former French territories, it is not putting it too strongly to say that French-language production and French-language audiences represent a media culture almost entirely separate from the English-Canadian experience, except where they overlap in the consumption of international, primarily American productions and across the smaller audiences for independent and experimental work. Concern about these "two solitudes"² is notably absent from recent discussion and from the policy recommendations of Creative Canada.

¹ This represents a proportional decrease since 1971 when nearly a third of Canadians were native French speakers. Increasing numbers of French-speaking Québécois (about 18 percent) consider themselves bilingual, but only 7.4 percent of English speakers outside Québec report being bilingual. Given a very high rate of immigration, over six million Canadians report speaking neither English nor French at home, with Chinese, Spanish, Punjabi, Arabic and Tagalog among the larger language groups, although 98 percent of Canadians can speak and understand at least one official language. (Government of Canada, 2024).

² Two Solitudes is the title of a 1945 novel by Hugh MacLennan that concerned the English-French divide and the title lives on in much discussion of the topic.

In major respects, the federal government's approach to the Canadian film industry, as part of a broader audiovisual sector, has been settled policy for decades (Wagman, 2019; Beauregard & Paquette, 2022; Turnbull, 2022). While so much of the industry is integrated with U.S. and global production and distribution, Telefilm's role is to maintain the niche that has been built up since the 1970s, by using its funding to leverage other investment, sales and distribution in Canadian cinema and requiring that Canadians occupy key creative positions in productions that qualify for public support. Canada retains its right to treat domestic production favourably (with restrictions) through a cultural exemption negotiated in a series of free trade agreements with the United States and Mexico. The latest accord is the 2020 CUSMA (Canada-U.S.-Mexico agreement). While some details have led to controversies and in-fighting over the years there is a strong degree of support for the broad policy from the dominant Canadian players, echoed by provinces and some municipalities which have an interest in production economies and related employment.

As previously noted foreign production (including but not limited to U.S. projects) makes up more than half of all film and television by dollar volume in Canada. In 2022 with most of the remainder made up of Canadian TV production, a relatively small number, 387 million dollars was spent making 148 Canadian feature films (Telefilm Canada, 2023a). This was a good recovery from the Covid years of 2020–2021, which saw film production halved, but only a few features reached Canadian audiences through cinema runs, with more achieving premieres at festivals and available principally through online distribution. In early 2024, against the protests of the Canadian Association of Film Distributors and Exhibitors (CAFDE), Cineplex, the country's largest cinema theatre chain and its distribution arm partnered with Lionsgate studios for the exclusive distribution rights through 2024 for Lionsgate's blockbuster titles. Accusing Cineplex of self-dealing, CAFDE argued that this agreement simultaneously restricts access by Canadian films to Cineplex's screens while keeping popular Lionsgate films out of independent cinemas and thus "also threatens the Canadian production industry, supported by the Department of Canadian Heritage and Telefilm Canada, which relies on Canadian distributors to get Canadian content films made" (Hertz, 2024a).

The profitability of the production industry in Canada and the business interests of the largest distributor and theatre chain thus cannot be separated from a global industry and may at times be at odds with the cultural objectives of policy, or at least, the business interests of other parts of the

industry. Integration is on such a scale that production facilities readily change hands internationally. A recent example concerns the Pinewood group studios on Toronto's lakeshore. Seeking to benefit from Canadian production incentives, Pinewood, the long-established UK studios which from 2009 had been leasing the facilities while they were under Canadian multi-partner ownership, closed its studios in Atlanta and in May 2023 bought the Toronto studios outright (Vlessing, 2023). Then, in January 2024 Amazon MGM studios signed on a 5-year contract for 160,000 square feet of new studio space at the Pinewood Toronto Studios (IBC365, 2024). A ribbon-cutting event for the new studios featuring both Ontario's Conservative premier and Toronto's socialist mayor marked what appeared to be a natural or inevitable shift from the old studio system to the platform leaders as content producers. That neither Pinewood nor Amazon is Canadian went unremarked in celebratory media coverage. What was important was the retention and enhancement of a production industry and jobs and maintaining the visibility and property value of expensive keystone sites on its revamped industrial waterfront. Amazon had made numerous high-profile productions in Canada (*The Handmaid's Tale* and *Fargo*, among many others) and would be well positioned to continue to earn profits in this favourable setting, while honouring the as yet unspecified requirements to produce Canadian content to be introduced by the CRTC after the passage of Bill C11, The Online Streaming Act.

The Canadian film industry is thus designed to innovate in and sustain production *in general* and the benefit to Canadian filmmakers, beyond some state funding and content regulation is the availability of skilled labour and state of the art facilities, cross-border career mobility, subsidised training and support for distribution. Maintaining the link to Hollywood film and television and to other global producers has become key for higher-budget films and for actors and directors. While most of this production is in English, the entrée to the Hollywood system has also benefited French-Canadian directors such as *Dune* director Denis Villeneuve who have crossed successfully into working in the global English-language market.

Canada joined Eurimages in 2017 and since then has received major funding for a selection of films, with both well-known directors (David Cronenberg) and first-time directors receiving support (RDV Canada, 2021). Prior to joining the consortium Canada was already in dozens of co-production agreements and the Eurimages group helps to multiply the funding sources and distribution networks Canadian producers already

access. Co-production, therefore, is second only to the Canadian audiovisual industry's integration with global English-language production as a pillar of its economic viability, beyond domestic investment and state support. French-language film and TV, in particular, benefit from association with France and other French-speaking territories (Telefilm Canada, 2023b). While domestic "ethnic" media have received scholarly attention for some time (Ahadi et al., 2023) a vital area for further research and policy development is the growing participation of Canadian talent and audiences in diasporic media markets.

PLUS ÇA CHANGE?: "OUR NEW APPROACH MUST CONTINUE TO SUPPORT A DOMESTIC SPACE AND MARKET FOR CANADIAN CONTENT" (DEPARTMENT OF CANADIAN HERITAGE, 2017)

In 2017 "Creative Canada" was announced by the Minister for Canadian Heritage Mélanie Joly in a Youtube video presentation reflecting the nearly-new government's attention to how citizens were accessing information and entertainment. The government committed to updating legislation, supporting institutional reforms and providing increased funding over a five-year period (2018–2023) across many institutions and programmes. It emphasised support for Indigenous culture across the spectrum of the arts and media. But its most high-profile theme was culture in a digitised world (Bourcheix-Laporte, 2022). The shift to online production and consumption and its impact in all cultural sectors was highlighted and was to be addressed by updates to the Copyright Act and to promoting and requiring the discoverability of Canadian content³ in the online world (Department of Canadian Heritage, 2017).

The measures which gained the most public and media attention in Canada were plans to address the economic crisis in legacy news media

³The Canadian Radio-television and Telecommunications Commission (CRTC), the Canadian Audio-Visual Certification Office (CAVCO) and Telefilm Canada each play a part in determining Canadian content for film and television productions, international co-productions and for production tax credits. The rules are complex but the citizenship of key production personnel, according to different formulas, has been the common element. This way of calculating Canadian content avoids prescribing what kinds of topics and editorial approach are Canadian, but many participants in a recent major study by the Canada Media Fund study indicated a revived desire by creators to engage in a substantive discussion of Canadian content in order to improve representation, rather than to continue to avoid the question (Canada Media Fund, 2023c).

(especially local newspapers and radio) due to their loss of advertising revenue and resulting closures and sell-offs to regional and national media monopolies, as well as the crisis and opportunity in the move to the digital consumption of audiovisual content. Both Canadian news gathering and distribution and the film and television industries were losing audiences and revenue in the presence of free or low-cost streaming services earning advertising dollars but not required to carry Canadian content, contribute to Canadian film and television production, or to compensate the Canadian news services they carried. The economic, political and cultural consequences of this structural shift were emphasised. How were Canadians to continue accessing local and national news, or to create and find Canadian stories in the avalanche of platform offerings? How could the diversity and equity commitments in Canadian cultural policy and the financial contribution to Canadian production required of private broadcasters and distributors be applied to the platforms who, the government argued, were a de-facto part of the Canadian media, but who were as yet unregulated by the Broadcasting Act? The logic behind the 2023 Online News Act was the same as similar efforts in other countries: to have platforms, notably Google and Meta, compensate Canadian news producers, both print and broadcast, for the advertising revenue lost as citizens turned to online sources for their news (Prousky, 2023). By the time the bill was passed, however, the amount from the platforms that would return to Canadian journalism was whittled down through hard bargaining from an original \$100 million dollars, to \$25 million in actual new funding (Geist, 2023).

The Online Streaming Act of April 2023 amends the 1991 Broadcasting Act. It has a number of objectives, but they can only be achieved by regulations yet to be defined and applied by the CRTC (Hertz, 2024b). The directive to the CRTC (Canada Gazette, 2023) encompasses a long list of regulatory changes it is required to develop— a charge to the CRTC more onerous than the summary of the legislation widely reported. The core requirements are the development by the CRTC of rules requiring streaming services to participate in funding Canadian production (e.g. through the Canada Media Fund) and to be otherwise governed as other Canadian media are in terms of obligations to Canadian content, which is also to be redefined, no small task (see note iv). The discoverability of Canadian content on the platforms (with French and minority language programming highlighted) was to be emphasised. Consultations and negotiations with media enterprises around these key elements and ensuring compliance, can be expected to be difficult. There was so much concern expressed

(and incited) about censorship and online privacy and consumer choice during public and parliamentary debate about the Act that the CRTC felt obliged to publish a web page and make other announcements refuting accusations that Youtubers and podcasters would be regulated or censored, that online gaming would be regulated and that the government would (somehow) intervene in the algorithms used to direct content to audiences (Canadian Radio-television and Telecommunications Commission, 2023b).

Embedded in the language of the Act and in the “Direction” it gives to the CRTC are indications of cultural shifts that have received much less publicity. The CRTC is directed to enhance not only the growing participation of Indigenous peoples as creators and audiences (see, e.g., Claxton & Winton, 2023), but also to acknowledge their many cultures and languages, their territorial sovereignty and their “narrative sovereignty”—the right to tell their own stories. Regardless of how successful the CRTC may be in these measures, or indeed how much priority it is able to give to them, the language itself reflects rapid recent change in official discourse about the relationship between Indigenous and non-Indigenous people in Canada following the Truth and Reconciliation Commission Report of 2015 on the genocidal policy of residential schooling for Indigenous children (Truth and Reconciliation Commission of Canada, 2015). Similarly, the CRTC is required to consult with “members of equity-seeking and ethnocultural groups, including Black or other racialized communities” in developing new content and support requirements (Canada Gazette, 2023).

EQUITY IN THE DIGITAL WORLD

If the major policy approaches to Canadian film and television are in fact more continuous than disrupted, appearing for now, despite an altered environment, to carry on in the tracks of an industry strategy developed decades ago, what about changes in the participation of women and other historically underrepresented people? What do we know about how women, gender diverse and Indigenous, Black and other racialised Canadians are represented in the film and other audiovisual industries in

this dynamic period?⁴ Advocacy and policy changes have impacted on representation and its monitoring, as they have in Europe, but the move to digital platforms presents new challenges for policy makers.

As elsewhere, women worked in Canadian television and film from its earliest days, but there were characteristics to their participation common around the world; low-profile behind-the-scenes roles in production management and lower budgets and less publicity for female-scripted and directed projects. At the same time there have always been strong box-office and tv viewing figures for drama and comedy with female leads.

The National Film Board of Canada/Office Nationale du Cinéma (NFB/ONF) was established in 1939. As an institution it has been the setting for many cultural and political conflicts, such as cold-war politics, French-language rights, Québec autonomy and women's rights. It has been of crucial importance to the development of documentary cinema in Québec, to generations of well-known directors and well known for its award-winning animation studios. In 1974 women working at the NFB convinced its directors to create Studio D which was dedicated to production by women. Over many years the Studio produced successful and controversial feature documentaries on topics such as abortion, lesbian history in Canada, the pornography industry and the experiences of Indigenous women. In later years some critics felt it failed to encourage the formal experimentation taking place in feminist cinema and its leadership and staff directors had remained, predominantly, white women. However by 1996 when it finally closed the Studio's leadership had supported key productions by diverse teams on topics including Black, Lesbian, Indigenous and disability experiences.

But at the same time as Studio D and a few dedicated programmes promoting women at the CBC/Radio Canada and other broadcasters were beginning, regional film and video collectives, small independent producers and festivals were also starting up and providing the pressure on funding programmes. The 1970s to the 1990s were important years for Canadian independent cinema and video, not only for women but for

⁴The 2023 annual report of the advocacy organisation Women In View includes an extensive rationale for recording the racial and gender identities of both "minorities" and "majorities" (such as white women, among women) rather than treating them as aggregates (e.g. "women" or "racialised people") and argues for more thorough and meaningful data collection and standardisation to achieve accurate monitoring of equity initiatives in the media. Most public media funding in Canada now requests but does not require some form of self-declared identification. (Women in View, 2023)

Indigenous, Gay and Lesbian and racialised people who took charge of their own representation and eventually were able to influence mainstream funders, programmers and distributors as well as establishing their own institutions and festivals (Brinton & MacGowan, 2020).

MEASURING CHANGE

It was not until 2018 that the CRTC hosted a summit on “Women in Production”⁵ in recognition of what advocates felt was a stagnation in women’s progress in the industry, gaining voluntary commitments from CBC/Radio Canada, Bell Media, Blue Ant Media, Corus Entertainment, Wildbrain (formerly DHX), Rogers Media and TVA Group. Each of these individual organisations produced reports for the CRTC in 2021 and 2022 on their record on gender equity and in 2023 some also reported on other Diversity, Equity and Inclusion actions (DEI). In 2023 the CRTC indicated it hoped to include smaller independent producers in reporting in the near future (Canadian Radio-television and Telecommunications Commission, 2023b), a priority also for some of the producers above, given their commissioning of content from independents whose teams they do not directly supervise.⁶

The reports for the 2022–2023 year, the third year of these reviews, make interesting reading, not only for the raw figures reported which show some recovery for women following a downturn in production in 2020, but for differences in methodology, occupational variations only partly accountable to the kinds of production each organisation creates, purchases and distributes and for additional comments on DEI, both in-house and in partnerships. Also revealing are the editorial choices and remarks in the submissions by each organisation. Many are self-congratulatory and some web pages profile women and racialised creators

⁵ The Women in Production summit came about as a result of campaigning by the following organisations, indicative of the depth of advocacy that had developed since the 1970s: the Federal Department for Women and Gender Equality, Femmes du cinéma, de la télévision et des médias numériques, Réalisatrices Équitables, Women in Film and Television Vancouver (now the Gender Equity Media Society Vancouver, GEMS), Women in Film and Television Toronto, Women in View and Women in Communications and technology.

⁶ A full description of the debates and final rulings of the CRTC on what should be included in the reporting is at <https://crtc.gc.ca/eng/archive/2019/2019-304.htm>. It should be noted that the productions for which reporting is required are television series with budgets over \$900 k and films over \$2.5 m.

whose presence affirms the organisational commitment to equity in ways that the numbers do not. Some charts and figures are embedded in textual presentation, other submissions have annexes or footnotes. Because of all these differences the CRTC webpage that hosts the seven reports does not display aggregate or comparative results (Canadian Radio-television and Telecommunications Commission, 2023c).

After a preamble highlighting the profiles of senior women in its management and production hierarchy, Bell Media provides comparative results for drama, comedy and factual content, in its French and English sections, showing the numbers of women as Producer, Director, Writer, Director of Photography (DOP), Editor and Showrunner in the three genres. This allows us to see that drama is the category with the greatest participation of women in these roles, that comedy is surprisingly weak in most categories and that the role of DOP is the weakest across the board. This is not surprising given the historic rarity of women in cinematography alongside sound recording and design. Bell claims to have reached the Canadian Media Fund's separate equity requirements (Canada Media Fund, 2023c) while setting itself more ambitious targets for the next CRTC reporting period:

The Canada Media Fund (CMF) has separately developed initiatives to increase gender balance in key creative positions (which differ from those identified by the Commission). Broadcasters are required to spend a minimum of their CMF performance envelope allocations on projects where at least 40% of the total number of key creative positions are held by women. The thresholds set by the CMF started at 15% of each broadcaster's envelope in 2017 and are now at 50% in 2023. (Bell in Canadian Radio-television and Telecommunications Commission, 2023c)

This comment seems to reflect Bell's annoyance with having to report on two different metrics and with the CMF's apparently accelerated goals (Canada Media Fund, 2023b). On the other hand the reporting on DOP in Bell's submission highlights the need for training and opportunities for women in technical aspects of production and raises the question of why the "key creative" categories of some of the other respondents don't yet include such a fundamentally creative position even though it is one of those required by the CRTC.

The CBC/Radio Canada reported in an aggregated format that for 2023 47 percent of its French language and 60 percent of its

English-language production met the equity target, confirming it was meeting the CRTC targets for gender equity in the key roles. Its report commented:

In 2018, CBC/Radio-Canada began voluntarily compiling data on gender parity in key TV production roles: producer, director, writer, and showrunner. The study's scope was defined to enable CBC/Radio-Canada to measure the achievement of internal objectives as well as allow for benchmarking with other industry studies. Our data includes: original Canadian, external independent production, and content commissioned by CBC and Radio-Canada (feature films not included, except for CBC FILMS). We did not include co-productions and acquisitions.

Further to the CRTC's request, we have modified our reports to include certain common baseline information, such as the number and percentage of women occupying key creative roles for each production, type of production, and information on the production budget to allow for gender-based analysis.

The public broadcaster was lagging behind the private and independent organisations in reporting on the three required genres (drama, comedy, factual) and had not collected data on all key roles. The reasons for this remain opaque:

CBC/Radio-Canada has not collected information in certain categories, such as women occupying the roles of cinematographer and editor and therefore, these fields have been left blank. We are updating our practices to ensure that all the requested information is collected starting in the 2023–2024 broadcast year. The Commission has also requested information on the type of production (e.g. drama, comedy, factual, etc.). This requires CBC/Radio-Canada to determine the genre for content that is available only on CBC Gem or ICI Tou.TV. As a result, caution is required when comparing the data delivered here with previously published data. (CBC in Canadian Radio-television and Telecommunications Commission, [2023c](#))

Corus Entertainment, owner of Global Television, is a national media conglomerate based in Toronto controlling 33 television channels, many radio stations and with a very significant presence in digital distribution. Its dramatic productions reported an average of 54 percent of women in key creative roles with the strongest percentages in writing, producing and

editing The Corus report goes to some lengths to describe how senior women in the organisation are board members of the national women's media advocacy organisations Women in Film and Television and *Réalizatrices Équitables* and how Corus partners with other organisations and universities to sponsor students and provide mentoring in technical and business roles in media. In addition, Corus was one of a number of reporting organisations developing a relationship with the Black Screen Office and participating in its Black Women Directors' Accelerator Program (Black Screen Office, 2024). But it too sought to remind the CRTC that its compliance with the terms of the 2019 agreement was limited by other obligations—to the CRTC: “While we will continue to do our part to drive the decisions we can control, we must not forget that CRTC regulations require us to purchase the vast majority of our high budget programming from independent Canadian producers, over whom we have limited control” (Corus in Canadian Radio-television and Telecommunications Commission, 2023c).

Rogers Sports and Media reported that women occupied 40 percent of managerial roles in production and news, 67 percent in programming and planning and 59 percent of on-air performing and journalism roles. As a company focussed on sports, news and “lifestyle and entertainment” it chose to report on these roles as in its view the nearest equivalents to the key creative roles in the CRTC review. It cited the multiple arms of the company as committed to diversity through an in-house EDI programme and to a range of measures to eliminate bias and bring forward diverse candidate slates for managerial positions. It also reported near parity in creative positions within the small number of independent productions it screened (Rogers in Canadian Radio-television and Telecommunications Commission, 2023c).

TVA, the largest private French-language network, reported an average of 43 percent of women in key roles, or “parity” in its productions, with 56 percent of producers, 21 percent of directors and 38 percent of script-writers being women. Wildbrain, a Canadian-based multinational in children's programming, showed the strength of women in some areas of this field, with women as 73 percent of writers, 54 percent of producers, but only 21 percent of directors (TVA and Wildbrain, in Canadian Radio-television and Telecommunications Commission, 2023c).

In contrast to the alternately grudging and self-congratulatory tone of many of the above reports, the independent advocacy organisation Women in View's report *On Screen 2023* covers similar ground but in a lengthier,

more detailed and analytical fashion and for a much broader set of productions in both film and television.⁷ Whereas some of the reports make the most of elementary and incomplete data, the WIV study is more intersectional and asks many more questions. For example, while all women lost more production opportunities and employment than men during Covid, Black and racialised women lost the most. By looking at whole production teams the WIV study reveals how productions led by these women and by gender diverse people tend to provide better opportunity for others like themselves and that similarly, white men tend to hire white men. The report takes pains to describe its methods and the challenges of accessing reliable and complete information despite the support of all the major national media funders and the collaboration of media producers (Women in View, 2023).

Over an almost identical period, The Council of Europe passed a Recommendation in 2017 that the years 2018–2023 should have a focus on gender equality in the audiovisual sector (Council of Europe, 2024). Related to that initiative, Eurimages ramped up its commitments to women in cinema with the goal of achieving funding equality for female and male led production by 2020. Unlike the Canadian equity efforts, Eurimages also applies the “Bechdel test” to funding applications, in which women characters’ activities and scripted dialogue are expected to be substantial and not only concerned with their relations to other characters as, for example, relatives or romantic partners. The outcomes of the Council’s Recommendation and the Eurimages gender equity goals are not yet known. However a study released in early 2024 comparing gender equity in film in the United Kingdom, Canada and Germany (as Eurimages members) in the years 2005–2020 showed that both Germany and the UK performed better than Canada in positioning women and gender minorities (the report’s term) in key production roles and in the proportion of production funds going to their films. The authors speculate that in Germany the requirements of public funders and in the UK the influence of the British Film Institute’s Diversity Standards for funding

⁷“This report includes 234 English-language television projects:127 drama series and, new for this report, 107 documentary series, funded by CMF for production in 2019–2020 (referred to as 2020) and 2020–2021 (referred to as 2021). This report also includes 653 English-language film development projects and 127 English-language film production projects that received Telefilm Canada funding in 2019–2020 (referred to as 2020) and 2020–2021 (referred to as 2021). In total, 5919 credits were reviewed, 1721 of which went to women and gender diverse creatives.” (Women in View, 2023).

assistance have led to greater compliance than the self-identification and reporting used by the CMF, Telefilm and the CRTC. In all three countries, however, decision making senior positions were overwhelming occupied by men. The research did not cover racialised people and other minorities within Europe, in part because of a lack of available data, but it did acknowledge the more intersectional focus of Canadian research and reporting, given our colonial history and relations with Indigenous peoples (Loist et al., 2024).

CONCLUSION: IT DEPENDS WHAT YOU MEAN BY COMPETITIVE

English-language Canadian cinema is not economically competitive if by competitive we mean either a positive return on investment for most films produced by Canadians in Canada in any given year, or earnings comparable to Hollywood and its online successors. The nearly century-old problem of getting Canadian cinema in front of Canadian eyes also means that we have no neutral “competitive” ground in which to test whether consumers would prefer Canadian films to others. The foundational failure to regulate Hollywood distribution is one of the most frequently cited examples of how language, geography, an aggressive United States and competing interests within Canada have forced the construction of a cultural defence system protecting a space for cultural creativity. The niche for Canadian film making built up since the 1970s is challenged, not for the first time, by a new factor, in this case platform streaming. Like other audiovisual industries it is beginning to confront the threats posed by artificial intelligence.

In common with European countries that support film making, individually and collectively through Eurimages for example, governments like Canada’s feel an obligation to defend their industries on cultural and economic grounds simultaneously. Large corporations, independent film collectives, women and members of minority communities and a host of linked and competing parties and jurisdictions share an interest in the legislation and institutions that protect them all. A review of Canadian film policy published in 2019 concluded that Canadian cinema is essentially bureaucratic (Wagman, 2019). This was not meant pejoratively but as a realistic and even admiring acknowledgment of the expert work Canadian filmmakers do to combine their creative ideas and technical skills with

navigating, lobbying and reporting to multiple bureaucracies, in a highly concentrated Canadian media industry whose major players have significant impact on policy (Winseck, 2023).

It may be a niche, but as a niche it has grown. This is because, as Loist et al underline, the Canadian film and television industry, like others, has grown immensely in the past fifty years. It produces more Canadian film and television, more projects for foreign, mostly US producers and more productions led by women and minorities, a niche within a niche. How successful Canadian policy makers will be at navigating digitisation and maintaining a sustainable place for Canadian content remains a question. The current strategy is to attempt to regulate the platforms as they have regulated the broadcasting and cable industries. But even before new regulations were fully in place, these players resisted meeting their required contributions to Canadian media funds. And, the decline since 2023 in new content investment by the streaming platforms has affected creative projects and production services in Canada as elsewhere. The uncertainty and disruption caused by US-initiated tariffs and trade barriers under the current administration add to these challenges. In the short run the Canadian government is committed to supporting public broadcasting and to protecting the creative industries. Adapting to a volatile international media market and to accelerating technological change such as the role of artificial intelligence will require all the ingenuity and resourcefulness that Canadian media producers have shown in surviving and succeeding in an always difficult environment.

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PART IV

Conclusions



Landscape in the Mist: Where Next for the European Film Industry and Its Competitiveness?

*Mafalda Dâmaso, Fernando Ramos Arenas,
Antonios Vlassis, and Katharine Sarikakis*

The contributions to this volume have offered a multifaceted examination of the dynamics of competitiveness of the European Film Industry (EFI) positioned vis-à-vis the EU's governance framework. They covered a comprehensive range of factors in the EFI ecosystem: from under-researched dimensions with regards to the cultural creation to youth as citizens, consumers and creators; from film festivals and emerging—online—platforms

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to EU policies and industry dynamics. They also reflected on internal diversity and on the global presence and impact of the EFI, usually in relation to the three layers of analysis—questions on diversity and inclusion, the particularities of its economic model, and its global value—that occasionally overlap but are presented separately for analytical purposes. In short, the Reader enabled a thorough critical analysis of both the EFI as a competitive actor within the global film politics and economy and the relevance (or lack thereof) of competitiveness, as it is currently understood, for the future of the EFI.

Epistemologically, the volume demonstrated that developing a rigorous examination of the competitiveness of the EFI and its relation to the EU's governance framework requires engaging with a multitude of methods, disciplines, levels of analysis and case studies. Perhaps paradoxically, it is precisely this broad range of perspectives that highlights the specific ways in which the EFI deals with competitiveness. From a governance lens, the Reader encapsulates the multidimensionality that is required to implement the idea of a truly EFI, which is seen as a transnational entity with common identity and long-term goals, rather than a fragmented assemblage of national film industries that are exclusively in competition against each other. Doing so, it foregrounds the many challenges that must be navigated to achieve it.

The chapters also highlight a number of tensions and gaps in EU heritage, film, audiovisual and digital policies that must be addressed if the EFI's development and international dissemination is to be consistent with the values of the EU and to balance equally concerns with innovation, economic value, cultural diversity and democratisation. They identify both shortcomings and potential avenues for the development of the EFI and its competitiveness. It is helpful to begin by summarising the former, before reflecting on the latter.

REDEFINING COMPETITIVENESS

To begin, several contributions emphasise the centrality of cultural diversity in and for the EFI and the limitations of market-driven understandings of competitiveness to make sense of the EFI's value. Reflecting for instance on cultural awards, Lähdesmäki and Hiltunen argue that they are “a form of governance in which awarding bodies set the rules for and govern the (potential) recipients but also in which recipients (are expected to) self-govern their activities to receive the award and to turn the attention followed by it into a valuable commodity” (Chap. 6). In making this

statement, the authors highlight the intersection between the aim of increasing market demand for European films and the awards' recognition of their support for a number of values. The failure of EU governance to increase the productivity of the EFI, as is highlighted by the authors, may result from the absence of an integrated policy approach that recognises market and non-market aims as mutually reinforcing. In line with the contribution by Hiltunen and Lähdesmäki, the EFI's competitiveness "relies on audiences interested in discovering and viewing European films. Consequently, cultivating audiences for European cinema is a method of enhancing the industry's competitiveness" (Chap. 4). Therefore and without denying the value of supply side measures, competitiveness analyses that assume stable demand are of limited relevance to the cultural sector, to whose economics fads and trends are central.

Other contributions reflect on competitiveness in light both of the issue of cultural diversity and inclusion and of the particularities of the EFI's economic model. This becomes evident when one considers the state of the art analysis developed by Sarikakis, Chatziefrimidou, Juengst and Ramadani, who note the tendency of competitiveness frameworks to focus on innovation or technology as drivers of economic growth. Summarising the theory of change that tends to underlie these debates, the authors highlight how the cultural and creative industries are a vital economic factor whose growth is crucial to foster national competitiveness. In this context, they also stress how international productions or co-productions are primarily driven by the aim to either expand audiences or produce content that existing audiences find attractive (citing Parc & Messerlin, 2020, p. 390); in this regard, youth entrepreneurship is understood as a driver of innovation and increased productivity. However, the question of inclusion and democratisation tends to be absent from these discussions. Similarly, Caballero Ruiz de Martín-Esteban argues in her chapter that traditional definitions of film competitiveness do not cover the "objectives, functioning and value parameters" (Chap. 8) of the European film industry. More, such traditional definitions deny the fact that the "creation of the MEDIA programme was intended to counteract the liberalisation of the audiovisual market resulting from the Television Without Frontiers (TVWF) directive (1989)" (Chap. 8) and, more broadly, the duality of EU policy goals in this regard: "protecting European cinema's cultural and linguistic diversity was as crucial as promoting its competitiveness" (Chap. 8). An analogous point is made by Beale in her comparative chapter when she questions the relevance of the idea of competitiveness defined exclusively

as a positive return on investment or as the achievement of earnings comparable to Hollywood. Likewise, Trubert and Mansion-Vaquié suggest that competitiveness arises “not only in economic and production circuit terms, but also in qualitative and aesthetic terms, one of the major challenges presented by AI” (Chap. 9).

This critical framework is developed by other contributors whose work illuminates in further depth the tension between existing scholarship on competitiveness and the cultural economics of the EFI. For instance, the analysis developed by Ramos Arenas explores some of the paradoxes generated by different understandings of the concepts of competitiveness. He mentions, on the one hand, a model “set for international competition, whether it be in merchandising or the production of audiovisual goods and services” (Chap. 6), which positions the EFI as an actor within a broad global film industry with “fewer and stronger players” (Chap. 6) of which the EFI is one among several. On the other hand, he also highlights a second model better equipped to ensure “cultural diversity and the democratic values usually associated with the European project” (Chap. 6), that is, one “rich in alternatives, where different voices and parties (micro, small and medium-sized enterprises) are present and punctually ally to push projects that may enjoy different ways of circulation, in different countries of the internal market” (Chap. 6). The implications of this duality can be also felt in the examination of the Common European Data Space for Cultural Heritage, as explored by Turan and Sganga in their contribution. Framed by the Commission’s aim to “to accelerate the digital transformation of Europe’s cultural sector” (Staff Working Document SWD (2024) 21 final cit. in Chap. 5), the authors interpret the CHDS’s support for the digitisation of cinematographic works by digital means from two perspectives. Firstly, in light of the 2000 Lisbon Strategy, which “stressed the need for structural and legal reforms to catch up with the challenges and needs triggered by the digital revolution” (Chap. 5) with the aim of establishing the EU as “a global market leader”. But also, secondly, reflecting on the recognition of EU film-making as a form of cultural heritage by the Council (Resolution 94/C 85/02) and as “an effective tool to transmit this abundance of socio-historical and cultural information to future generations (Resolution 2000/C 193/01), to showcase and document European values and to safeguard their diversity (Resolution 2000/C 193/01)” (Chap. 5).

This has led to the gradual construction of a complex but precarious policy balance. Psychogiopoulou, Samaras and Comerma illustrate this

challenge in their contribution to this volume: “since the late 1980s [...] to govern the free movement of audiovisual services”, the EU has acted firstly in two broad manners: promoting competition and “removing barriers to the freedom to provide and receive audiovisual services” (Chap. 2). However, and despite recognising the need for an emerging “common programme production and distribution market” (Psychogiopoulou, 2021, p. 36)—which the TWFD regulated—to face digital and international competition, broadcasters, like other media providers, were nonetheless asked to continue to respect the country-of-origin principle accompanied with the assumption that “only one Member State should have jurisdiction over any given audiovisual media service provider” (Chap. 2). The emergence of a common European approach to audiovisual content is still evident in the maintenance of European quotas for traditional audiovisual media services and extended in provisions included in the 2010 Audiovisual Media Services Directive (AVMSD) regarding on-demand audiovisual media services. In other words, despite its “technology-neutral regulatory approach to linear and non-linear audiovisual services” (Chap. 2), the 2010 AVMSD maintained its focus on “the need to ensure optimal conditions of competitiveness and legal certainty in the light of technological developments,¹ and to approach competitiveness from the protection of minors, human dignity and media literacy perspective” as well as “promoting the distribution and production of European works” (Chap. 2). Later, changes introduced by the 2018 revision of the AVMSD resulted in increasing “requirements for the promotion of European works by on-demand audiovisual media services” through Article 13, which “prescribes a minimum of 30% European works in the catalogues of providers of on-demand audiovisual media services and helpfully combines it with requirements for the prominence of European content” (Chap. 2). Questioning the country-of-origin principle, this also led to “the establishment of the possibility that Member States lay down obligations for *all* media operators under their jurisdiction to contribute to audiovisual production through direct investment in content or contributions to national funds” (Chap. 4). As in previous case studies, the analysis underscores the continuous, yet difficult, negotiation between the principle of subsidiarity and transnational technological and cultural trends and, at the same time, of respect for cultural diversity and fair competitiveness.

¹ Ibid., Preamble, Recital 4.

The last part of the volume readdresses some of these questions on the competitiveness of the EFI at the global level. Rossato Fernandes, Vlassis and Coenen examine the changing views of policymakers in the EU and in Latin America regarding the principle of cultural diversity. Their analysis reveals different underlying notions of competitiveness. As in previous chapters, the authors highlight the challenges created by Video-On-Demand (VoD) to the existing regulatory frameworks. In particular, they discuss the AVMSD and its introduction of quotas and investment obligations. While they uncover general agreement that “ensuring a level playing field is crucial for maintaining fair competition, protecting consumers, promoting cultural diversity, providing legal clarity and addressing contemporary challenges in the audiovisual sector”, stakeholders have different views on how these principles should be translated into regulations. The chapter further reveals that their views are divided into two opposing fields. On the one hand, some European organisations emphasise the need to strengthen the AVMSD’s fairness and effectiveness via, namely, the extension of its scope for major audiovisual platforms and a separate set of rules to respond to intensifying media convergence and platformisation. These stakeholders argue that “the lack of contribution to the production and distribution of European works by certain online players, which either fall outside the current scope of the AVMSD or try to avoid stricter national rules through jurisdiction shopping within the EU [...] distort competition among operators” (Chap. 10). The implementation of the AVMSD, by placing more obligations and responsibilities on traditional audiovisual providers, is seen by these stakeholders as leading to “serious distortions with respect to the promotion of cultural diversity and media pluralism” (Chap. 10). That is, in their view, cultural diversity has been translated in the Treaty through a maximalist reading of the principle of subsidiarity. This is reflected in the existence of highly limited EU competencies in audiovisual policy and, therefore, in the coexistence between multiple national rules regarding investment obligations and the country of origin principle, which is used by some online operators to eschew fair competition and increase their competitiveness. In other words, the Union’s support for cultural diversity may have paradoxically resulted in a policy framework that endangers such diversity.

On the other hand, a different group of stakeholders believes that current AVMSD provisions are sufficient and that the distinction between linear and non-linear services remains relevant. Key in this position is the fact that these stakeholders do “not perceive any distortions in the

market” (Chap. 10) as emerging from platformisation and see streaming services in a more positive light, that is, “as a valuable tool for promoting cultural diversity” (Chap. 10). Underlying this disagreement is a different understanding of the link between cultural diversity and market structure, as is suggested by the existence of various views regarding market distortions, as the authors recognise, that is, of the need (or not) for a level playing field. The importance of this relation in the debate on film competitiveness becomes clear considering another context, for instance, the current audiovisual policy debates in Latin America. As the authors of the chapter demonstrate, transnational VoD services are seen by local film stakeholders mostly positively “as having the potential to increase the competitiveness of the Ibero-American audiovisual sector, especially by boosting the funding to local/national productions” (Chap. 10) and by supporting “content diversity and social inclusion” through increased visibility by VoD platforms for “voices that have been historically underrepresented in the media” (Chap. 10). Dâmaso, Albornoz, García Leiva, Vargas Miranda, Vlassis, Rossato Fernandes, Coenen, Akcali, Behlil and Doğu Erdede also highlight the non-economic value of the EFI, its contribution to international cultural diversity, and global governance. Moreover, they also address the temporal element of discussions of competitiveness, which “focus on short-term assessments of markets based on existing supply and demand logics” (Chap. 11). Rather, they suggest that moving the discussion of the EFI’s competitiveness beyond traditional indicators associated with market outputs, labour productivity, price elasticity and consumer preferences may be a prerequisite for the development of policies focused on long-term market-building.

FUTURE SCENARIOS FOR THE COMPETITIVENESS OF THE EFI

The combined evidence gathered in this volume poses a number of questions for future research on the EFI. Namely, it remains to be understood in which ways the EFI can be better supported internally with dedicated policies and, externally, in which ways films from the EFI circulate and are received by international audiences. Moreover, the shift from a short-term to a long-term focus on competitiveness also requires a better understanding of global market needs, the generation and circulation of cultural capital, and the cinematic preferences of young viewers. Yet, despite the remaining evidence and research gaps, the chapters suggest four potential future scenarios to navigate the challenges that characterise the EFI today.

They differ in terms of the degree of coordination that is required across two axes: horizontally, that is, between the different national film industries of the Union and vertically, that is, regarding the EU's role. The more active scenarios would allow the EU to develop and implement long-term strategies strengthening the ability of the EFI to, on the one hand, compete more strongly against large-scale, Hollywood-style productions while also, on the other hand, function *de jure* and *de facto* as an ecosystem characterised by cultural and industrial diversity. This trajectory would be engaging in several dimensions, but importantly in a renewed commitment to strengthen those 'spaces' that on the one hand have been seen as peripheral to market logics and, on the other, have remained as cornerstones of European cinema. That would mean renewing attention to existing public service institutions that support the funding, know-how, and distribution of independent films; strengthening care for the next generation of filmmakers, film audiences but also policymakers; and providing direct and indirect support for the resilience of small national cinema productions.

The *first scenario* is one of continuity. In this model, the EFI continues to exist as the combination of several national film industries in relation to which the EU has a minimal role. This would maintain what Ramos Arenas describes as the "apparent contradiction between the national and the continental that constitutes European cinema" (Chap. 6).

In the *second scenario*, the EFI continues to be defined as the combination of several national film industries but the EU strengthens its institutional role, albeit remaining mainly auxiliary—for instance, by supporting the visibility and distribution of European film in the EU and globally via an increase in capacity-building around distribution, funding for internal and international European film festivals, and for the increased presence of awarded EFI productions in film markets and festivals. This scenario is compatible with what Lähdesmäki and Hiltunen describe as the EFI's reciprocal "brand logic" in that "the awarded cultural actors are expected to foster cultural diversity and shared cultural features in Europe as well as promote the visibility of the EU as a supporter of its local and regional cultural actors' activities and collaboration. At the same time, the cultural actors create (or the EU institutions use the emblematic cultural events to create) a more human and cultural image for the Union (Lähdesmäki, 2024)" (Chap. 4). Finally, the practical suggestions made by Trubert and, Mansion-Vaquié to strengthen the music production element of filmmaking are also aligned with this scenario. As they write, "the degree of

competitiveness for music in audiovisual production might lie in the ability to have more [...] rooms [...] enabling orchestras of very high quality to carry out recordings in short [...] workflows". This and other practical investments in national film industries would make film composers and thus European film "more competitive, not only by reducing the cost and the time of the workflow [...] but also in increasing the overall quality of the project" (Chap. 9).

In the *third scenario*, the EU increases its role of coordination of the national film industries that compose the EFI, taking on a more active position across the pre-production, production and post-production phases of the value chain and not only in the distribution phase (as is the case in the second scenario). This model sees the EFI as a continental cluster with multiple nodes, using intensified funding to strengthen collaboration between existing national film industries and agencies based on an reinforcement of the co-production model. This approach recognises the cultural and sociopolitical value of difference and fragmentation but, nonetheless, fosters opportunities for increased collaboration. This scenario is echoed in Caballero Ruiz de Martín-Esteban's conclusions, which suggest a new understanding of competitiveness "based on a balance between tradition and disruption", combining "the cinematic tradition of the European film industry" with the possibilities brought forward by the digital disruption. If this combination was commonly supported by the EU, this would lead to a recognition of the EFI as "the operation of a dynamic, diverse and balanced internal market" (Chap. 8), inspired namely by the recognition of the pivotal role played by film festivals, which "establish a transnational network connecting films, creators, managers and audiences across Europe [...]. In other words, competitiveness, in this sense, involves creating an internally competent ecosystem that energises a cultural circuit through which a broad and varied production is sustainably organised and disseminated, reaching diverse European audiences" (Chap. 8).

In the *fourth scenario*, the EU increases its coordination tasks and takes on a mission-oriented role, providing long-term leadership vis-à-vis other international film industries. This is translated into the explicit inclusion of the EFI in the EU's industrial policy and in the EU's support for the EFI's value chain—understood in an extended manner, that is, including public support for specialised training and fundamental research. This scenario responds to several points made by a wide number of contributors to this book, such as the argument made by Ramos Arenas. The author notes that

“legal strategies and policy documents adopted by the European Commission and the Council of Europe have shown (over the last three decades) great reluctance to delve into the ‘value chain’ of the industry” (Chap. 6). This weakens the EU’s ability to recognise, strengthen and tap fully into the economic, cultural, and geopolitical value of the EFI as a unique and collective actor in the global audiovisual economy. Doing so requires “understanding that securing cinema’s distinctiveness means reformulating its preferences and connecting more strongly with a tradition in which European film still has an important role to play” in the shared representation of the EU as a collective actor in the global audiovisual economy and governance (Chap. 6). Moreover, as the author notes, this shift should go significantly beyond the logic of the *exception culturelle* that framed the 1946 Blum-Byrnes agreements between the United States and the French government as well as the 1993 GATT negotiations – recognising the geopolitical value of cinema and, more broadly, overcoming the limitations of the protectionist logic.

Similarly, the analysis of Rossato Fernandes, Vlassis and Coenen uncovers calls by a number of film stakeholders for profound changes to the EU’s audiovisual and media policy and to the AVMSD. Particularly, such voices criticise the country-of-origin principle, which “is seen as further enhancing the power of transnational groups, undermining future developments of local cultural players [...]. This creates unfair competition between services and a race to the bottom for media policies of member states” (Chap. 10). Overcoming this situation requires harmonising national audiovisual legislation—for instance, as recommended by the European Coalitions for Cultural Diversity, by including a country-of-destination principle to the legislation—and, at the international level, to respond to the increase in power of US-based VoD platforms, by “fostering collaborative spaces for exchanging practices involving local stakeholders [...] and for improved cooperation among regions in devising new regulatory structures” (Chap. 11). Similarly, Psychogiopoulou, Samaras and Comerma suggest a more thorough examination of the distinction between conventional audiovisual media services and on-demand audiovisual media services as the current regulatory framework “no longer effectively prevent[s] so-called ‘jurisdiction shopping practices’ from escalating” (Chap. 2).

Despite not focusing on regulatory changes, Sganga and Turan also make policy recommendations to tap into the potential offered by the Common European Data Space for Cultural Heritage as a platform to

support the cross-border reuse of digital cultural heritage and, in so doing, the Union's "agenda to digitise, digitally disseminate and preserve the European film heritage" (Chap. 5). This requires "the adoption of EU-wide sectoral data-sharing policies and legislation, particularly to establish the stakeholder network in which data transfers will take place" (Chap. 5), addressing the current need for "a horizontal and encompassing regulation that could identify and ensure consistency in the efforts of Member States, CHIs, GLAM and other key players" (Chap. 5). In other words, the authors note that "a supranational intervention is needed to contour the CHDS and its ultimate goals" (Chap. 5)—particularly, "a robust roadmap to direct capacity-building and data governance activities and a legislative intervention introducing sectoral data-sharing rules, directed to encourage and enable B2B and B2G data transfers, facilitate the reuse of digital cultural heritage assets to be made available on the CHDS and ensure the free flow and reuse of public- and private-sector data by a multitude of stakeholders for both commercial and non-commercial purposes" (Chap. 5). Lähdesmäki and Hiltunen's argument on the importance of a coherent strategy for the EFI also moves in a similar direction, focused on the idea of a strong European brand. The authors emphasise that the EFI's "art house image could be better used to increase competitiveness of the European film industry [...]. Competitiveness includes building a strong brand signalling quality, uniqueness, film art and social responsibility" (Chap. 4).

For any such scenario to develop a successful outcome for the EFI, it will rely on the future audiences, publics and industry leaders. Expanding current academic and policy understanding of competitiveness also requires widening its temporality, that is, to plan not only for existing but also for future audiences and professionals. In this direction, Sarikakis, Chatziefrimidou, Jüngst, and Ramadani suggest the maturing of current European audiovisual and cultural policy frameworks, which see youth as audiences and consumers—but not as potential creators. A more ambitious, long-term approach to the EFI recognises the "pivotal role" of youth "in shaping the future of the filmmaking industry. It constitutes both a necessity and a means for ensuring competitiveness of the EFI globally", which can be addressed if the EU "more actively create[s] and provide[s] opportunities for young filmmakers" (Chap. 3). They argue that hitherto core policy assumptions about youth and children's role in the EFI have been limited, fragmented and focused on their potential as buyers and consumers. This ultimately represents a rather outdated

approach, which misses out on the potential and actual contributions of youth in shaping patterns of consumption *and* in leading the industry as creators and policymakers in the coming years. Similarly, Hiltunen and Lähdesmäki suggest that the Young Audience Award has an untapped potential to strengthen “the notion of young people as an important audience segment and as (future) filmmakers” (Chap. 7). However, they note that awarded films have limited distribution and mostly domestic theatre admissions. To address these challenges, the authors recommend increasing their availability through VoD platforms and EU funding for multilingual subtitles and dubbing. Indirectly, this would support a renewed approach to the EFI as part of the EU’s industrial policy that recognises its untapped potential in non-European markets.

As Psychogiopoulou, Samaras and Comerma demonstrate in their text, the understanding of the term competitiveness—and its relation to priorities such as cultural excellence, cultural diversity, societal well-being, social cohesion, job creation and innovation—in EU regulatory and funding acts has been the object of constant negotiation. For instance, its regulations acknowledge that “market fragmentation along cultural and linguistic lines can ‘lead to geographical imbalances and, subsequently, to a limited choice for the consumer’, which opens the door to potential conflicts” (Chap. 2). The authors’ pledge for the “EU legislator” to “be more outspoken and dynamically address ways in which they can be tackled” would be aligned with this scenario of a more strategic understanding of the EFI by the EU in its industrial policy and geopolitical position, adding to other policy shifts. Indeed, as they also note, “the Union’s funding instruments for the audiovisual sector and the EFI have gradually become closely associated with the Union’s strategic policy agendas and have thus approached and read competitiveness from the standpoint of the latter” (Chap. 2). This would also be consistent with the points raised by Dâmaso, Albornoz, García Leiva, Vargas Miranda, Vlassis, Rossato Fernandes, Coenen, Akcali, Behlil and Doğu Erdede, who identify not only common challenges in their analyses of six international film markets—namely, their dependence on US-based platforms, be it industrially or in terms of consumption patterns—but also potential ways to strengthen the international circulation of European films therein. The authors suggest strengthening the ties between these six local film industries and the EFI in multiple ways, including networking among film professionals, co-production arrangements between the EFI and local producers, support for independent distributors and sustained efforts in audience

development, contributing to “an imaginative shift in the EFI regarding its worldwide ambitions and strengths” (Chap. 10).

Whatever future scenario is collectively decided on by the many actors or comes to dominate the EFI ecosystem, the latter’s future is intimately connected to the EU’s own internal development as well as its role vis-à-vis the global governance of film and, more broadly, media and culture.

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