



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

Marina Rossato Fernandes and Antonios Vlassis

INTRODUCTION

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

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

M. Rossato Fernandes (✉) · A. Vlassis
University of Liège, Liège, Belgium
e-mail: mrossato@uliege.be

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

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

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

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

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

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

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

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

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

FROM ACADEMIC LITERATURE

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

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

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

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

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

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

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

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

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

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

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

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

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

... TO PROFESSIONAL VIEWS

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

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

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

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

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

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

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

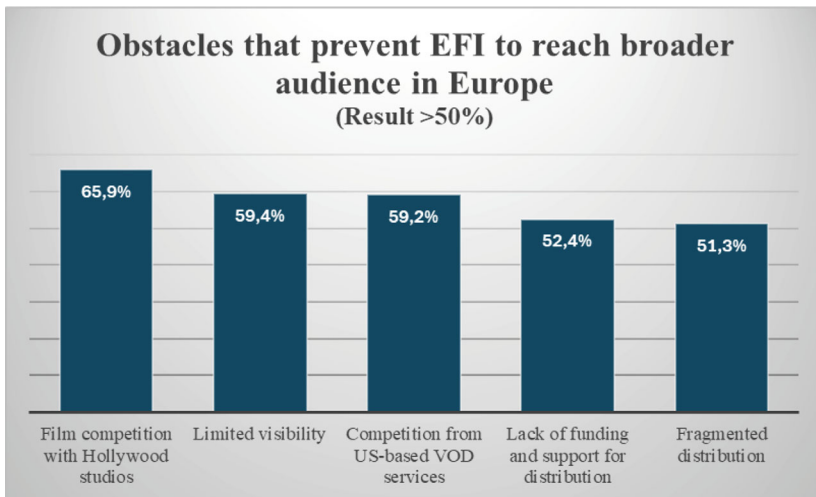


Fig. 5.1 Obstacles that prevent EFI from reaching a broader audience world-wide

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

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

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

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

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

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

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

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

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

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

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

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

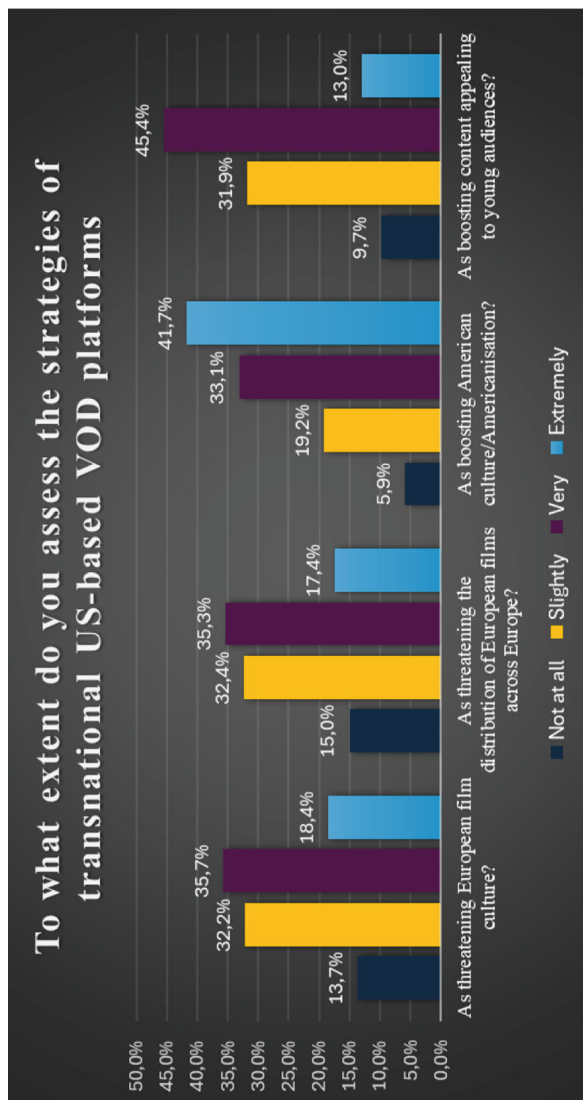


Fig. 5.2 Respondents' perception of the strategies of US-based VOD platforms (I)

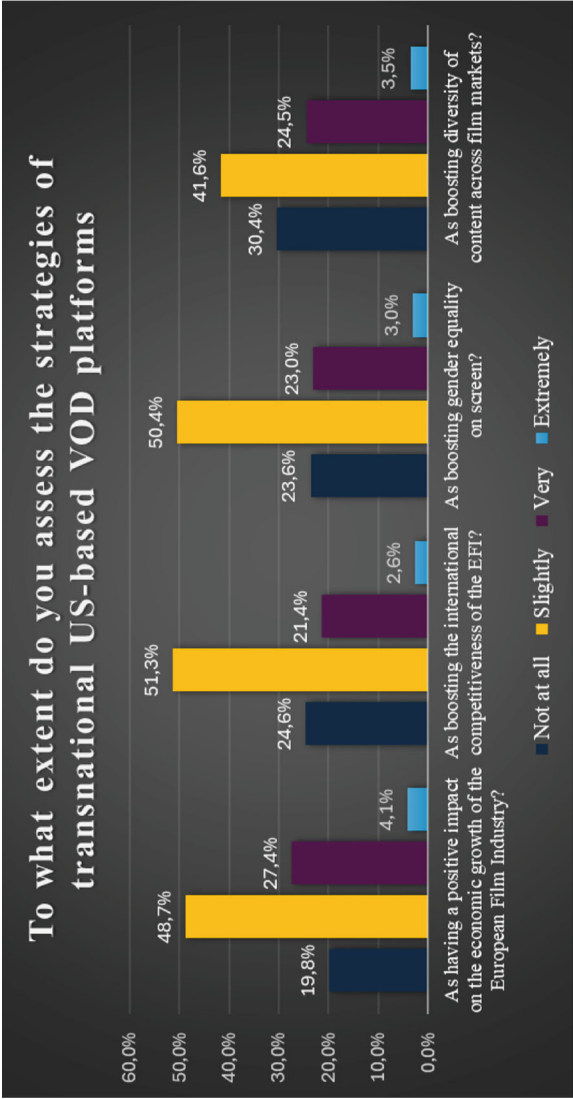


Fig. 5.3 Respondents' perception of the strategies of US-based VOD platforms (II)

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

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

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

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

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

TOWARDS POLICY PERSPECTIVES

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

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

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

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

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

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

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

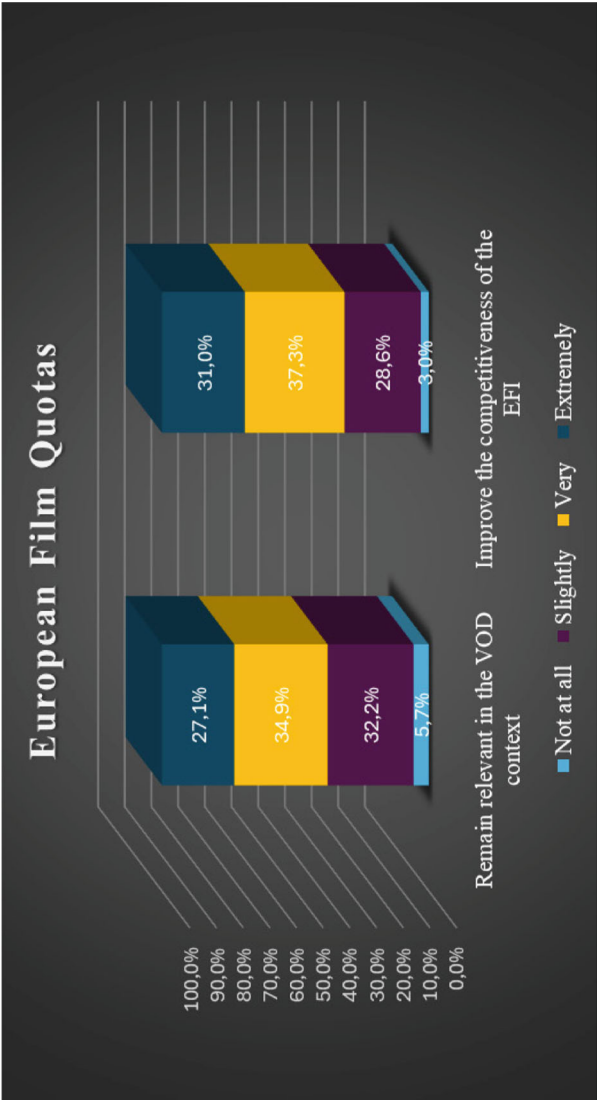


Fig. 5.4 European film quotas

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

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

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

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

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

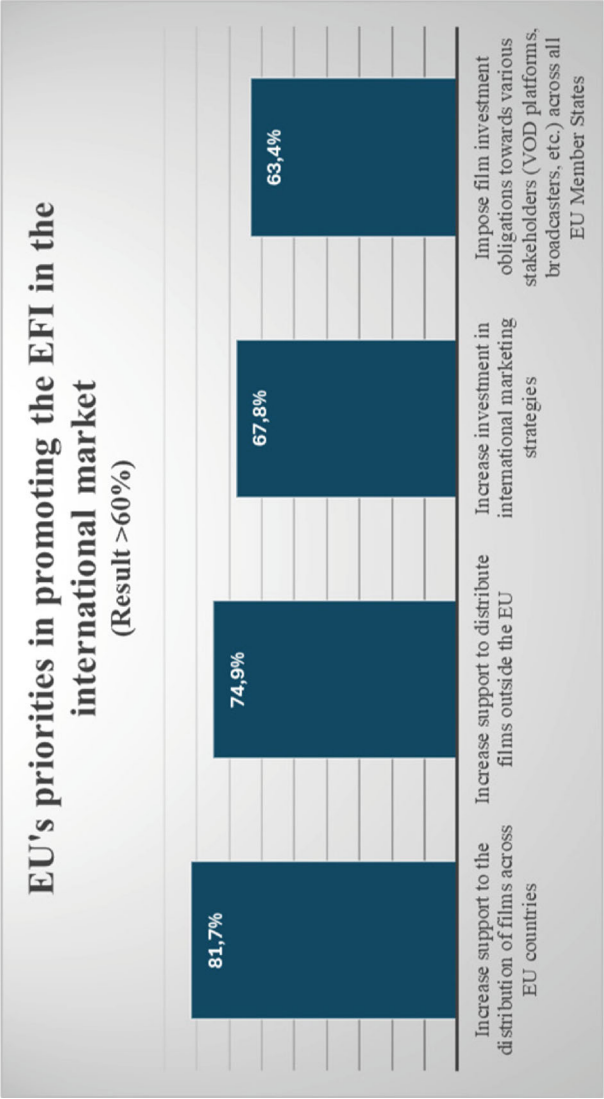


Fig. 5.5 EU's priorities in promoting the EFI in the international market

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

CONCLUDING REMARKS

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

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

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

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

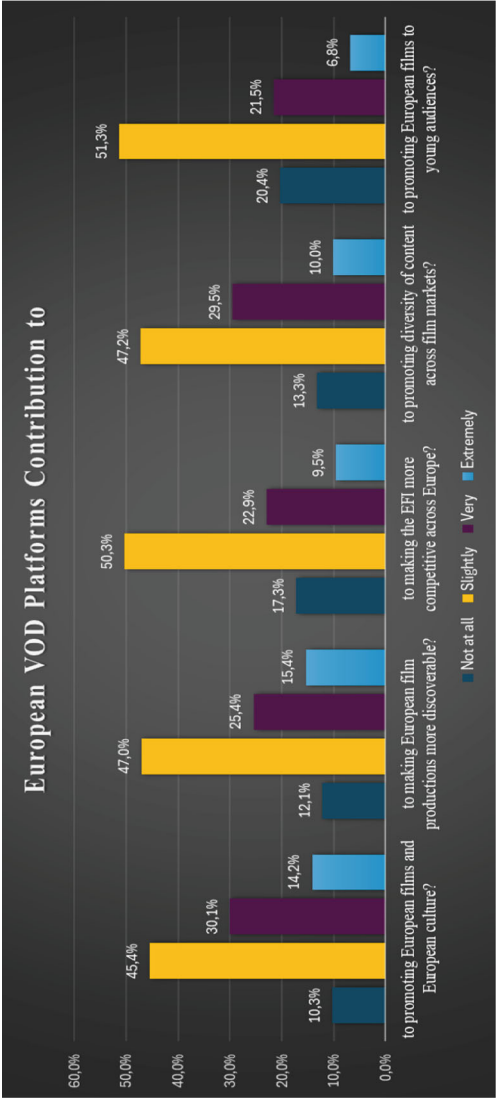


Fig. 5.6 Respondents' views on EU VOD platforms' contribution

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

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

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

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

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

REFERENCES

- Anindita, V. (2021). Disruptive strategy in the disruption era: Does Netflix disrupt the existing market? *International Journal of Business and Technology Management*, 3(1), 30–39.
- Broughton Micova, S., & Jacques, S. (2020). Platform power in the video advertising ecosystem. *Internet Policy Review*, 9(4) <https://doi.org/10.14763/2020.4.1506>
- Castro Marino, D., & Cascajosa, C. (2020). From Netflix to Movistar+: How subscription video-on-demand services have transformed Spanish TV production. *Journal of Cinema and Media Studies*, 59(3), 154–160.
- Chalaby, J. K. (2025). The rise and fall of European media: EU policy in the streaming era. *European Journal of Communication*, 40(3), 266–283. <https://doi.org/10.1177/02673231251340801>
- Davis, C. H., & Zboralska, E. M. (2019). Cultural policy in the time of digital disruption: The case of creative Canada. In L. A. Albornoz & M. T. García Leiva (Eds.), *Audio-visual industries and diversity in the digital age* (pp. 152–168). Routledge.
- De Vinck, S. (2014). The best defense is a good offense: Putting the European in European-level film support. In K. Donders, C. Pauwels, & J. Loisen (Eds.), *The Palgrave handbook of European media policy* (pp. 329–344). Palgrave Macmillan.
- Doyle, G. (2023). SVODs, new norms and the challenge for public service media. *Journal of Digital Media & Policy*, 14(3), 287–302.
- Farchy, J., Bideau, G., & Tallec, S. (2021). Content quotas and prominence on VOD services: New challenges for European audiovisual regulators. *International Journal of Cultural Policy*, 28(4), 419–430. <https://doi.org/10.1080/10286632.2021.1967944>
- Fernandes, M., Vlassis, A., & Coenen, L. (2025). Audiovisual regulation of VoD platforms in the EU and Latin America: Between level-playing field, competitiveness and rationality of audiences. In K. Sarikakis, M. Dâmaso, T. Lähdesmäki, F. R. arenas, & A. Vlassis (Eds.), *The governance of competitiveness in the European film industry: A reader*.

- Fernandes, M. R., & Alborno, L. A. (2023). Netflix as a policy actor: Shaping policy debate in Latin America. *Journal of Digital Media & Policy*, 14(2), 249–268. https://doi.org/10.1386/jdmp_00124_1
- Floridi, L. (2020). The fight for digital sovereignty: What it is, and why it matters, especially for the EU. *Philosophy & Technology*, 33(3), 369–378. <https://doi.org/10.1007/s13347-020-00423-6>
- Frey, M. (2021). *Netflix recommends: Algorithms, film choice, and the history of taste*. University of California Press.
- García Leiva, M. T. (2020). VoD platforms and prominence: A European regulatory approach. *Media International Australia*, 180(1), 101–115. <https://doi.org/10.1177/1329878X20967456>
- García Leiva, M. T., & Alborno, L. A. (2020). VOD service providers and regulation in the European Union: An audiovisual diversity approach. *International Journal of Cultural Policy*, 27(3), 267–281. <https://doi.org/10.1080/10286632.2020.1769614>
- Hammett-Jamart, J., Mitric, P., & Redvall, E. N. (2018). Introduction: European film and television co-production: Policy and practice. In J. Hammett-Jamart, P. Mitric, & E. N. Redvall (Eds.), *European film and television co-production: Policy and practice* (pp. 1–26). Palgrave Macmillan. https://doi.org/10.1007/978-3-319-97157-5_1
- Idiz, D. R. (2024). Local production for global streamers: How Netflix shapes European production cultures. *International Journal of Communication*, 18, 2129–2148.
- Idiz, D. R., Irion, K., Ebbers, J. J., & Vliegenthart, R. (2022). European audiovisual media policy in the age of global video-on-demand services: A case study of Netflix in The Netherlands. *Journal of Digital Media & Policy*, 12(3), 425–449. https://doi.org/10.1386/jdmp_00070_1
- Iordache, C., Raats, T., & Afilipoaie, A. (2022). Transnationalisation revisited through the Netflix original: An analysis of investment strategies in Europe. *Convergence: The International Journal of Research into New Media Technologies*, 28(1), 236–254. <https://doi.org/10.1177/13548565211047344>
- Jenner, M. (2018). *Netflix and the re-invention of television*. Palgrave Macmillan.
- Johnson, C. (2019). *Online television*. Routledge.
- Kalimo, H., & Pauwels, C. (2009). Policy approaches in the converging media and communications sector. In C. Pauwels, H. Kalimo, K. Donders, & B. Van Rompuy (Eds.), *Rethinking European media and communications policy* (pp. 353–365). VUBPress.
- Lacourt, A., Radel-Cormann, J., & Valais, S. (2023). Fair remuneration for audiovisual authors and performers in licensing agreements. IRIS Plus Report, European Audiovisual Observatory.
- Lobato, R. (2019). *Netflix nations: The geography of digital distribution*. New York University Press.

- Lotz, A. D. (2018). *We now disrupt this broadcast: How cable transformed television and the internet revolutionized it all*. The MIT Press.
- Mitric, P. (2024). The end of European co-production? Independent producers and global platforms. In C. Meir & R. Smits (Eds.), *European cinema in the streaming era*. Palgrave Macmillan. https://doi.org/10.1007/978-3-031-42182-2_4
- Pedro, J., & Camáñez García, G. (2024). Transnational subscription video-on-demand services in Spain: Promotion and advertising of audiovisual works. *International Journal of Communication*, 18, 4834–4858.
- Stephan, G., Farchy, J., & da Silva, J. (2023). US-based SVoD services and the restructuring of the audio-visual production market: The French case. *Journal of Digital Media & Policy*, 14(3), 323–338. https://doi.org/10.1386/jdmp_00132_
- Tang, W., & Wei, M. (2023). Streaming media business strategies and audience-centered practices: A comparative study of Netflix and Tencent video. *Online Media and Global Communication*, 2(1), 3–24. <https://doi.org/10.1515/omgc-2022-0061>
- Vlassis, A. (2017). The review of the audiovisual media services directive: Many political voices for one digital Europe? *Politique européenne*, 56(2), 102–123.
- Vlassis, A. (2021a). European Union and online platforms in global audiovisual politics and economy: Once upon a time in America? *International Communication Gazette*, 83(6), 593–615.
- Vlassis, A. (2021b). Global online platforms, COVID-19, and culture: The global pandemic, an accelerator towards which direction? *Media, Culture & Society*, 43(5), 957–969. <https://doi.org/10.1177/0163443721994537>
- Vlassis, A. (2023a). Why to regulate Netflix? The cross-national politics of audiovisual media governance in the light of streaming platforms. *Media, Culture & Society*, 45(7), 1511–1521.
- Vlassis, A. (2023b). Platform governance and the politics of media regulation: The review of the European audiovisual media services directive. *Journal of Digital Media & Policy. Advance online publication*, 14(1), 29–46. https://doi.org/10.1386/jdmp_00084_1
- Wayne, M. L. (2018). Netflix, Amazon, and branded television content in subscription video-on-demand portals. *Media, Culture & Society*, 40(5), 725–741. <https://doi.org/10.1177/0163443717736118>

Open Access This chapter is licensed under the terms of the Creative Commons Attribution-NonCommercial-NoDerivatives 4.0 International License (<http://creativecommons.org/licenses/by-nc-nd/4.0/>), which permits any noncommercial use, sharing, distribution and reproduction in any medium or format, as long as you give appropriate credit to the original author(s) and the source, provide a link to the Creative Commons license and indicate if you modified the licensed material. You do not have permission under this license to share adapted material derived from this chapter or parts of it.

The images or other third party material in this chapter are included in the chapter's Creative Commons license, unless indicated otherwise in a credit line to the material. If material is not included in the chapter's Creative Commons license and your intended use is not permitted by statutory regulation or exceeds the permitted use, you will need to obtain permission directly from the copyright holder.

