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ARTICLE



Film promotion across the EU member states and abroad: institutional practices in Denmark, Finland and France in an evolving policy and technological architecture

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ABSTRACT

The article examines public practices in three European Union (EU) Member States (MSs) – Denmark, Finland, and France – regarding the international promotion of their respective film industries and, by extension, the broader European film industry. It focuses on three main aspects: it examines (i) institutional mechanisms through which national authorities contribute to the film promotion across EU MSs and abroad, and (ii) how national authorities deal with the involvement of the EU in external audiovisual relations, seeking to understand the interactions and confrontations between national and EU film promotional efforts. Given the increasing importance of Video-on-Demand (VOD) services in the European film industry, the article also considers the perceived responses of national authorities to VOD platforms, examining to what extent national practices towards international film promotion align with the industrial action of VOD platforms and their transnational activities. Data comes from desk research, policy document analysis, and 35 semi-structured interviews with officials of state ministries, national cinema centres, and other stakeholders.

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European film industry; video-on-demand platforms; audiovisual policy; film promotion; co-production agreements

Introduction

On 14 May 2025, France and the Philippines signed an Agreement on Cinematographic Co-Production in Cannes, paving the way for collaborative projects in the film and audiovisual sectors between Filipino and French creatives. Similarly, in early September 2025, the European Film Promotion network launched the EUROPE! Hub initiative at the Toronto International Film Festival to showcase 13 European films. These developments reflect the continued efforts of national and European authorities to promote the film industry abroad, underscoring their central role in fostering international visibility for European cinema. However, the role of national authorities – their perceptions towards the importance of institutional film promotion abroad, and their interactions and tensions with European institutions and other key players in the

audiovisual landscape, such as Video-on-Demand (VOD) platforms – remains largely underexplored.

As such, the article examines and compares public practices in three European Union (EU) Member States – Denmark, Finland, and France – regarding the international promotion of their national film industries and, by extension, the broader European film industry. It focuses on institutional initiatives aimed at promoting national films beyond their country of origin, both within the EU and in markets outside the Union (Hoefert de Turégano 2006). The three selected countries differ significantly in terms of film market size, film production capacity (see Figure 1), market share of national films (see Figure 2), priority export markets, adhesion to the European Economic Community/European Union (France being a founding member, Denmark joining in 1973, and Finland in 1995) and the degree of centralisation in their support systems for the film industry (that is, countries with centralised and less centralised support models). These variations enrich the analysis by highlighting distinct rationales and approaches to the international promotion of cinema across the three case studies. As Caterina Carta (2020) explicitly mentioned, ‘the EU is a multilayered political system that presents significant coherence challenges. The way in which its member states organise their cultural policies (domestically and internationally) has a bearing upon the making of a common EU strategy’. In this sense, the article delves into these challenges, by seeking to examine whether the three EU Member States continue to serve as the principal promoters of their national film industries internationally and to explore how their efforts are supported or constrained by EU-level initiatives and other major actors within the European audiovisual industry, such as VOD platforms.

The empirical analysis presented in this article addresses several gaps in the existing literature. First, as widely acknowledged, public policy in Europe has historically played a pivotal role in shaping both the film industries and the broader audiovisual media sector. This role encompasses financial support, market regulation, the governance of intellectual property rights, and a variety of regulatory and promotional measures aimed at protecting and advancing national and European film industries. Such interventions have long been embedded within film and audiovisual policy frameworks at both the national and European levels (Ang, Isar, and Mar 2015; Calligaro and Vlassis 2017; Donders, Pauwels, and Loisen 2014; Psychogiopoulou 2015; Psychogiopoulou et al. 2024). Moreover, a growing body of scholarship has examined the 2005 UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions (CDCE), the key role played by the European Union in integrating the principle of ‘cultural diversity’ into its policy agenda and disseminating the 2005 Convention towards other regional entities, such as Mercosur (Canedo and Crusafon 2014; Council of the European Union 2004; Fernandes, Loisen, and Donders 2021; Pauwels and Loisen 2016; Psychogiopoulou 2012; Vlassis 2016). Nevertheless, the ways in which national authorities promote their respective film industries abroad, and how these efforts intersect with the EU’s external film initiatives, have remained insufficiently explored. It is worth noting that the PhD thesis of Robert Cravenne (1993) – founding member of Unifrance (see below) and its first general director – constitutes one of the earliest scholarly works devoted specifically to the international promotion of French cinema, with a particular emphasis on the role played by French public authorities. Similarly, the academic research conducted by Lecler (2015, 2016) seeks to elucidate the institutional mechanisms governing

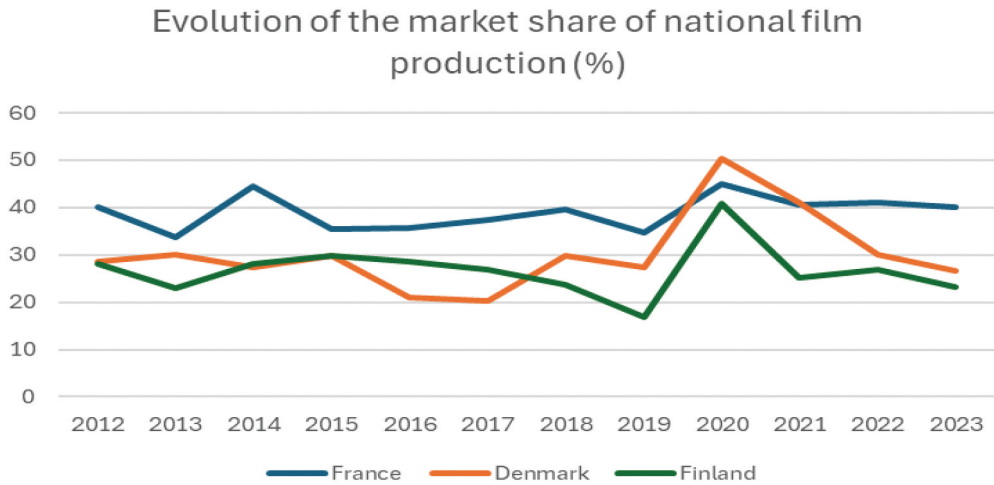


Figure 1. Evolution of the market share of national film production (%) in France, Denmark and Finland.

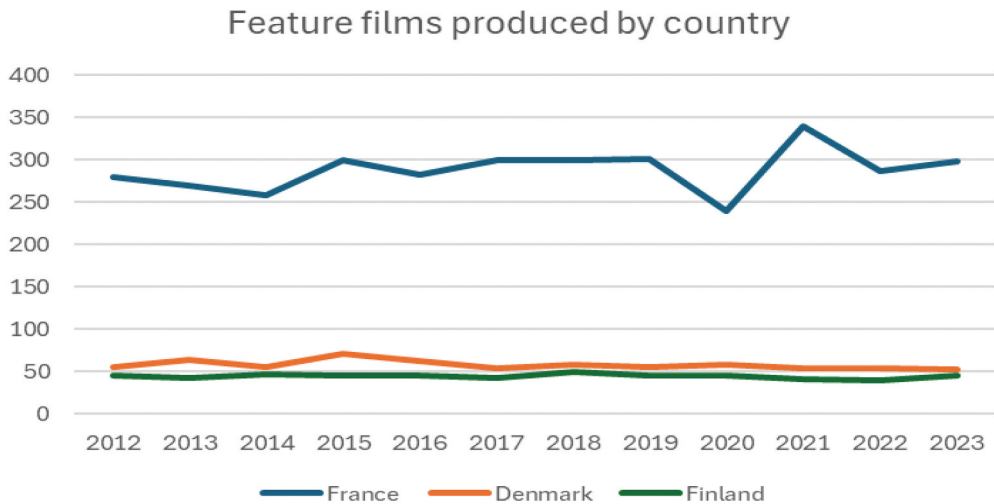


Figure 2. Feature films produced by country in France, Denmark and Finland.

the overseas promotion of French cinema, adopting a public policy – oriented analytical framework. Yet, despite their valuable contributions, these studies remain confined to the French context and do not investigate the tensions, negotiations, or interactions that arise between national promotional strategies and non-national institutional and industrial environments. To date, the only work that attempts a comparative analysis of institutional efforts to promote national film industries beyond their country of origin – across EU

Member States as well as outside the bloc – is the 2006 study by the European Audiovisual Observatory (EAO) and the Council of Europe (CoE) on public support for the international promotion of European films (Hoefert de Turégano 2006). This study remains a first attempt to map the tools, policies, and organisational structures deployed across Europe to enhance the promotion of national and European cinema abroad.

In a similar vein, academic studies have paid particular attention to co-production agreements and their contribution to the internationalisation of national film industries – and, by extension, to the European film industry as a whole. Scholars have investigated co-production as a key policy instrument within the European film policy framework, tracing its historical evolution and examining how it has been shaped by technological and industrial transformations, such as the emergence of VOD platforms (Meir and Smits 2024; Mitric 2018, 2025). However, the role of co-production agreements has been analysed primarily from the perspective of film professionals and European policymakers, while the views and strategies of national authorities – especially regarding their role in promoting national film industries abroad – remain underexplored. Moreover, recent academic research has increasingly examined the impact of global VOD platforms on the distribution of European films both within EU Member States and internationally, as well as on the resulting imbalances in content supply (Iordache 2021; Smits 2024). While the insights offered by this literature are highly valuable, further analysis is needed on how public authorities perceive the role of VOD platforms in promoting film industries abroad, and on whether their institutional practices align with – or conflict with – the activities of these platforms.

Finally, the institutional promotion of the film industry abroad pursues several objectives, including shaping national image and exerting influence in areas beyond culture, such as the economy (Rawnsley 2021). Regarding the former, it contributes to constructing and projecting a country's image abroad through nation branding strategies to shape international perceptions thereof (Gilboa 2008; Henze and Wolfram 2014; Kessler 2020; Nye 2004, 2019). Furthermore, the film industry is a strategic sector that drives trade, foreign investment and the broader development of creative industries (Lombard 2022), making film diplomacy a potential lever for international economic development. Finally, film can contribute to building connections between peoples with the aim of promoting mutual understanding and dialogue (Dâmaso 2026; Goff 2013; Henze and Wolfram 2014). However, although the role of the EU in international cultural relations (see European Commission 2016) has attracted considerable scholarly attention in recent years (Ang, Isar, and Mar 2015; Carta & Higgott, 2020; Dâmaso 2021, 2025; Dâmaso and Murray 2021; Higgott 2021; Parliament, Franke, and Mellar 2017; Scioldo 2024), the institutional promotion of the film industry abroad – and the dynamics between national authorities and EU-level policymakers – has received little attention in this literature.

A key goal of the article is to highlight how the institutional promotion of the film industry abroad is built and operationalised in situ (Vlassis 2022a). As such, we valued the inclusion of a qualitative analytical phase, through conducting 35 semi-structured interviews in English, French and Finnish, both in person and online, from September 2023 to November 2024 with representatives from ministries, public film agencies and film industry associations. Interviewees were emailed or given access to participant information sheets and informed consent forms beforehand and interviews lasted between 60

and 75 minutes. Moreover, most were conducted by one author – with the exception of three interviews focused on transnational film funding conducted by two authors. All interviews were digitally recorded with permission. To ensure openness and confidentiality, all participants were anonymised, enabling them to share their views more freely. The research results represent a composite of views as expressed through semi-structured interviews, analysed thematically according to three topics: (i) national institutional mechanisms of promoting film industry across EU Member-States and abroad, (ii) the links between national authorities and the EU policy initiatives, as well as (iii) the perceptions towards the role of VOD platforms in the film promotion.

The article focuses on the following key aspects: firstly, it analyses institutional mechanisms in the three countries and examines bilateral and regional co-production agreements as important examples of the ways how the three countries promote their national film industries abroad. Secondly, the article highlights the role of the EU in international film promotion to understand, on the one hand, how EU action has been articulated (or not) with national external film efforts and, on the other hand, how it has been perceived by the national authorities and other actors involved. Thirdly, focusing on how the various national actors approach VOD platforms, the article explores the institutional promotion of the national/European film industry in light of the evolving technological context in which the latter is embedded.

Institutional mechanisms for the promotion of national film industries abroad

The frameworks governing the promotion of the national film industry abroad in the three countries under study reveal institutional similarities. In each case, the primary responsibility lies with national film agencies, which serve as central coordinators for the development and implementation of international promotion strategies, reflecting a shared recognition of the strategic importance of cinema as both a cultural and economic asset.

Funded by various sector-specific taxes, the *Centre national du cinéma* (CNC) plays a pivotal role in supporting the French film industry across a broad spectrum of activities. In terms of international promotion, the CNC's Directorate of European and International Affairs is responsible for formulating and implementing policy in five main domains: managing cinematographic and audiovisual co-productions; overseeing international cooperation programmes, including those co-financed with external partners; supporting the export and global dissemination of French audiovisual works – particularly through support for the agency Unifrance (see below); maintaining institutional relations with the EU; and advancing cultural diversity in international negotiations, such as those under the World Trade Organisation. Similar institutional mechanisms exist in Denmark and Finland, including the Finnish Film Foundation (FFF) and the Danish Film Institute (DFI).

The FFF is an independent foundation that operates under the supervision of the Department for Cultural Policy of the Ministry of Education and Culture. The main role of the FFF is to support filmmaking in its different phases through various mechanisms such as screenwriting grants, development support and slate development support, production support, exhibition and distribution support, and international promotion. Production support for international co-productions is also provided. Regarding international promotion, it focuses mainly on festivals, networking, and training initiatives. It also

provides targeted support such as project, marketing, and travel grants to help filmmakers secure partners and visibility abroad. FFF also mentions cultural export as one of its tasks: to promote Finnish art and culture abroad without any direct financial goals. In other words, financial success is not the only objective, even though it may be the most important one (Interview with FI3).

In addition, the DFI aims to promote film culture in Denmark by supporting all stages of filmmaking, from development and production to promotion. International promotion is part of the DFI's mandate and includes support for the participation of Danish films at major festivals through activities such as joint Nordic promotion and tailored campaigns. The DFI also assists minor co-productions and offers support for festival launches in collaboration with producers and sales agents. However, this support is primarily focused on a limited number of high-potential films targeting major festivals. Although institutional or programmatic linkages between the DFI and the Danish Ministry of Foreign Affairs are sporadic and ad hoc, it should be recognised that the latter is one of the main funders of Creative Denmark (a not-for-profit, public-private partnership whose mission is to increase the visibility of the Danish creative industries), thus indirectly supporting the international promotion of the Danish film industry.

Among the most illustrative examples of institutional film promotion remains the development of co-productions. Overall, co-productions are highly favored because they combine expertise from multiple countries and incorporate diverse cultural elements that resonate with domestic audiences. They generally secure larger budgets through pooled funding, ensuring distribution in all participating nations (Drake 2018) and attracting foreign investment while strengthening local industries (Morawetz et al. 2007). Additionally, they provide access to multiple funding systems and enhance international market reach (Amiot 2018; Cabrera Blázquez et al. 2018).

On the one hand, in France bilateral co-production agreements have historically been a cornerstone of international film strategy (Hammett-Jamart 2018). These agreements enabled the mutual recognition of national status for co-produced films, allowing them access to domestic funding and market protections. Films recognised under these treaties benefit from eligibility for national funding schemes in each partner country and enjoy access to France's substantial array of subsidies (Cabrera Blázquez et al. 2018). These arrangements are particularly beneficial for emerging film industries, which might lack the financial infrastructure to support large-scale productions independently. Notably, as of February 2024, France had entered into 61 bilateral co-production agreements, significantly exceeding the corresponding figures for Germany (27), Spain (21), Denmark (9) and Finland (2), thereby illustrating France's priority in film cooperation. Among these 61 bilateral co-production agreements, 35 are with European countries, 6 with South American countries, 5 each in sub-Saharan Africa and Asia, 4 in North Africa, and 2 agreements respectively in North America, Central America, the Middle East, and Oceania (CNC 2024a). Besides, in 2023, 40.3% of the films approved by the CNC were co-productions (CNC 2024b). Given that France holds the position of the leading film producer in Europe, the international promotion of French cinema carries significant implications for the broader European film industry.

Moreover, new co-production treaties are contingent upon the partner state being a signatory to the 2005 UNESCO CDCE. In addition, such countries must demonstrate

a commitment to preserving cultural diversity in WTO negotiations and resist liberalising their audiovisual sectors under a free-market approach (Interview with FR8). Reciprocal legislative frameworks for co-productions are also a necessary precondition. In line with France's broader cultural diplomacy strategy, the *Aide aux Cinémas du Monde* (ACM) programme was established in 2012. Co-managed by the CNC and the *Institut français*, ACM is a selective fund designed to foster international co-productions. The majority of funded projects originate from countries that already have bilateral co-production agreements with France (Pomp 2020; Viñuela 2018). To date, ACM has supported more than 600 projects, averaging 50 to 60 per year (Institut français 2025a).

In addition, France-based interviewees acknowledged that co-productions alone are insufficient to guarantee market success. In many cases, support from two institutional actors, *attachés audiovisuels* and *Unifrance*, is required to facilitate industry networking, raise awareness of existing agreements, and enable distribution. Established in 1987 (Lecler 2016), the *attachés audiovisuels* are cultural/film diplomats, who are employed and remunerated by the Ministry of Foreign Affairs, but operate under the authority of the *Institut français* (Lecler 2015; Interview with FR4, FR6). As of 2024, the French network abroad includes 64 personnel working in this domain: 37 audiovisual attachés – 14 regional and 23 bilateral – and 27 project managers. Together, they cover 117 countries and territories, including regions such as Sub-Saharan Africa, the Americas, Southeast Asia, the Balkans, and the Middle East. These professionals serve as information relays and intermediaries between national institutions and local film stakeholders, offering sector-specific expertise across diverse geopolitical contexts (Interview with FR6, Delestre 2014). In parallel, Unifrance plays a complementary role. Though legally independent, Unifrance receives approximately 90% of its funding from the CNC, with the remaining 10% provided by the Ministry of Foreign Affairs under a performance-based agreement (Interview with FR5; Interview with FR8). Unifrance operates within a commercial framework, working closely with French professionals to support international sales and the commercial launch of new films (Interview with FR6; Interview with FR8). Unifrance has developed its own territorial representation system that complements the work of the French audiovisual attachés. These representatives, known as *chargés de territoire* (territory managers), are responsible for promoting internationally the interests of French audiovisual professionals in specific regions. Unifrance maintains three international offices in New York, Beijing, and Seoul, the latter of which also covers Japan and Southeast Asia (Unifrance 2025).

On the other hand, the Nordic countries reveal a more transnational and collaborative approach to the international promotion of film. In Finland and Denmark, the *Nordisk Film & TV Fond* (NFTVF), established in 1990, plays a central role in fostering the Nordic audiovisual sector and its promotion abroad. Its remit includes support for fiction, documentary, and animated films, as well as dubbing and inter-Nordic distribution. The fund receives approximately 200 applications annually, 70–80 of which are for fiction projects. To qualify for production funding, a project must have secured at least 70% of its financing and demonstrate distribution in a minimum of two Nordic countries, with a significant portion of funding coming from one of the Fund's constituent members (NFTVF n.d.).

The NFTVF is not only a funding body but also an advocate for Nordic co-production. According to fund representatives, co-producing within the Nordic region is significantly

more flexible than within the broader European framework. Unlike many European funding schemes, the NFTVF does not require recipients to spend their budget across national borders, thereby prioritising creative coherence over economic reciprocity. As one interviewee noted, this helps avoid situations where narrative choices are driven primarily by financial constraints rather than artistic merit (Interview with NFTVF1 and NFTVF2). There is also a strong ecological rationale underlying this position. Fund representatives critiqued ‘travel-based’ tax rebate systems common in several Nordic countries, arguing that such models are misaligned with sustainability goals (Interview with NFTVF1 and NFTVF2). This criticism – a contradiction in EU funding, which values sustainability highly but still asks for evidence of travel in its co-production schemes – was echoed by several interviewees in Denmark.

Additionally, *The Five Nordics* (formerly known as *Scandinavian Films*) is a collaborative platform uniting the national film institutes of Denmark, Finland, Iceland, Norway, and Sweden. The initiative focuses on joint international promotion, professional exchange, and advocacy for sustainable filmmaking. In 2024, it was rebranded to better reflect the broader geographical and institutional scope of Nordic cooperation (Dalton 2024). A FFF interviewee highlighted the strategic importance of the alliance, stating, ‘Scandinavian Films’ main idea is of course that together we are stronger’ (Interview with FI4). The closeness of the cooperation was emphasised across interviews, with some describing it as so integral that similar collaborations outside the region are sometimes overlooked (Interview with FI5). *The Five Nordics* has a project manager and a rotating board chaired by one of the member countries every two years (The Five Nordics n.d.). One of its core promotional activities is the collective presence at key international film markets and festivals such as Berlin, Cannes, Toronto, Clermont-Ferrand, and IDFA. For both symbolic and economic reasons, the Nordic countries share a common stand at these events, amplifying their visibility and signaling regional unity (The Five Nordics, n.d.; Interview with FI1).

The European Union and the promotion of film industries abroad

Initially, culture was excluded from the 1957 Treaty of Rome, as it was seen as the domain of organisations like the Council of Europe or UNESCO. Until the early 1980s, cultural, technical and political issues related to the production, distribution and consumption of film and audiovisual goods and services had been mostly absent within European Community discourses, even though several voices from the *Centre national du cinéma* (France), organizations of culture professionals as well as from academics started calling for the establishment of European public measures for the film industry (Depétris 2008, 126–168). It can be said that since the 1980s, the EU has started playing an increasingly important role in the sphere of the film and audiovisual industry. As Iosifidis (2011, 143) pointed out, there are notably three key reasons: firstly, the globalisation of communication systems contesting the idea of mainly national media; secondly, the EU intervention in the field of audiovisual media and communications was deemed necessary in the process of the Europeanization of national markets; thirdly, the increased EU competence over the communications industry was equally significant.

Since the inclusion of Article 128 in the Maastricht Treaty – renamed Article 167 in the Treaty on the Functioning of the European Union (TFEU) – culture has become an integral

domain of EU policy making. The Treaty of Lisbon (2007) slightly expanded the EU's role, though cultural policy remains a 'supporting competence,' meaning the EU may complement but not replace national efforts (De Vinck 2014; Pauwels 2014). Within this framework, the EU has embraced a dual approach to cultural and film policy: promoting both industrial competitiveness and cultural diversity (De Vinck 2014; Jäckel 2007; Vlassis 2022b).

The majority of interviewees acknowledged the existence of shared values across film industries in Europe – such as the promotion of cultural diversity and the defence of artistic freedom. In their view, the EU's support has significantly contributed to reinforce national film industries and their strong collaboration, enabling the production of more competitive films and fostering film cooperation across EU MS. In particular, interviewees considered that the MEDIA programme has had a significant impact on national film industries, including those of Denmark, Finland and France and they focused on the transformative role the programme has played in internationalising national film production (Interview with FR3; Interview with FR4). Finnish stakeholders highlighted that MEDIA support helped initiate international collaboration at a time when such practices were unfamiliar to Finnish producers (Interview with FI2; Interview with FI8). One interviewee even suspected that contemporary Finnish film cinema would hardly exist in its current form if Finland had not joined the MEDIA programme in the early 1990s (Interview with FI6). Danish film professionals confirmed this, highlighting co-production and slate funding (i.e. Interview with DK6) and the fact that European funding towards film 'comes in both development and distribution, which is the key difficult moment' (Interview with DK8).

Besides, several international initiatives from Unifrance and CNC are funded by the EU and the MEDIA programme, such as DEENTAL-ACP Bonus, Aid to world cinema distribution, and MyMetaStories (Interview with FR8). In addition, initiatives from Finland and Denmark such as CPH:LAB in Denmark focusing on co-development of documentary projects among EU Member States and pitching courses for producers participating in the Works in Progress events of Finnish Film Affair were made possible due to European funds, which have been crucial in further developing and promoting the film and audio-visual sector in Finland and Denmark internationally. It is therefore not surprising that several stakeholders interviewed emphasised the critical role of the EU's support for the film industries in the three countries.

Beyond MEDIA, the EU supports several initiatives aimed at enhancing the global visibility of European cinema. One such programme is *European Film Promotion* (EFP), a network of 36 national film promotion public agencies, such as the Danish film institute, the Finnish Film Foundation and Unifrance (European Film Promotion 2023b). Created in 1997, the goal of EFP is to support the European film industry by increasing the visibility of European films at the international level and support the development of filmmaking talents. To this end, EFP organises marketing campaigns, facilitates networking, and supports European delegations at major international festivals (European Film Promotion 2023a; Hoefert de Turégano 2006). Some interviewees (Interview with FI2; Interviewee with DK4) highlighted the value of the EFP, particularly in markets outside Europe – such as the United States and South Korea – where smaller national cinemas often struggle to gain visibility independently (for further on this point, see Fernandes and Vlassis 2026 in this issue).

The EU also supports EUNIC, a network promoting cultural relations with the EU across the globe. EUNIC is composed of different national institutes or national ministries having the promotion of culture in their attributions, such as the Goethe-Institut, the Danish Cultural Institute, The Finnish Cultural and Academic Institutes, or the French Ministry of Foreign Affairs and Europe. The network is represented in 108 countries with 140 clusters, which are created when at least 3 EUNIC members are present in the country. EUNIC is funded by membership fees from each partner as well as a contribution from Creative Europe. The *European Film Festival* initiative was launched in 2018 and coordinated by a consortium led by the Goethe-Institut and including the *Institut français* and Cineuropa. It supports the EUNIC network in organising European film festivals worldwide (for more on this topic, see Lähdesmäki et al. 2026 in this issue). It has a budget of approximately €1 million annually and involves 76 EU delegations (Cineuropa 2024; Institut français 2025b). Support provided by the *European Film Festival* also includes non-commercial broadcasting rights, subtitles, training, and technical assistance.

In addition, public authorities in Denmark, Finland and France have a role in key decision-making bodies of European institutions, as members of the management committee of the Creative Europe Programme, the Board of Directors of the Eurimages Fund and the Board of the EFP network. They also are Parties to Council of Europe's Convention on Cinematographic Co-production and also involved in the European Film Agency Directors Association (EFAD), which unites directors of national film agencies across the EU and beyond. All these organisations and institutions work together to develop and implement audiovisual policies and promote European cinema internationally.

However, while the idea of a unified 'European cinema' identity has gained some attention, scepticism persists regarding the practicality and desirability of such an approach. On the one hand, interviewees stressed the diversity and plurality inherent in the continent's film industries. Stakeholders highlighted that European cinema exists alongside multiple national cinemas, each with its own identity, and cultural sensibilities. Several interviewees – notably from France – noted that the emphasis on creative authorship could be seen as a defining feature of European cinema, distinguishing it from more commercially driven industries. But the creation of a pan-European cinema brand could undermine the distinctiveness of national cinemas, such as French cinema – rooted in a strong cinematic heritage and identity (Interview with FR8; Interview with FR3) – or the Nordic film industry, known for its emerging regional identity. "It does not make much sense to talk about a 'European film', because there is no such thing as an 'European Pudding' (Interview with FR3). From this standpoint, a unified and unique European label might blur the unique character and strengths of national and regional film cultures, subsuming them under a more generic European umbrella and risking the absorption of smaller cinematic traditions by the more dominant ones. As such, attention was also drawn to the dominant role of the French film industry in promotion. One interviewee said that the French were everywhere and that Finns often had difficulties finding suitable dates for their events because the French were already organising something there (Interview with FI2).

On the other hand, in discussions around international promotion, questions were raised about whether the EU should take on a more prominent role than it currently does. These concerns reflect broader doubts about the effectiveness of a centralised EU promotional body, both in symbolic and pragmatic terms. As one Finnish interviewee noted, 'It's

hard to imagine some huge European film promotion agency in the EU with a hundred and forty-seven people (...) it would probably end up with national institutions operating out of Brussels' (Interview with FI8). Regarding Denmark, although there was openness for more concerted European action, interviewees suggested that it should differ in its aims from those of national schemes, giving international market building as an example of something that the EU could focus on: 'Should EU schemes have the same targets as national authorities, or should it be something else? Does it make sense from an European perspective? How do you develop a combined strategy?' (Interview with DK4). The EU was also cautiously envisioned as playing a role in harmonising the support systems of European countries. A Finnish interviewee speculated about the possibility of synchronising the support systems of European countries, as they are unequally positioned in co-productions due to their differing film production resources. However, achieving synchronised national film policies would be politically difficult, as the EU cannot intervene in national budgets (Interview with FI7). Similarly, several Danish interviewees argued for stronger action from the EU to avoid a race to the bottom in the film industry, both regarding tax incentives and contracts with streamers. This issue is discussed in more depth below.

Besides, French stakeholders highlighted that France benefits from a robust system of public financing and promotional mechanisms, making centralised EU intervention seem unnecessary from their perspective. 'French cinema is one of the most visible on the international scene, one of the best exported. We already have a huge number of financing possibilities. So I think that if I were based in another country, I'd be able to say, "Well, the public authorities in my country are weak, so we really need Europe"' (Interview with FR4). Similarly, concerns were raised about the potential erosion of State autonomy in audiovisual policymaking, particularly regarding co-production agreements and international promotional strategies. French representatives emphasised the importance of maintaining control over these areas, highlighting the substantial resources already devoted by the French state to the development of co-production agreements and film promotional activities (Interview with FR5; Interview with FR7). Interviewees argued that EU-level initiatives should complement, rather than replace, national efforts.

Together, these perspectives reveal a cautious stance toward deeper EU integration in the international promotion of the film industry. While European cooperation is seen as valuable – particularly in terms of funding, training, and circulation, not to mention in more long-term issues such as international market-building – there remains strong support for maintaining national autonomy in matters of film branding and promotion. This reinforces the earlier: despite the EU's increasing actorness in international film relations, national actors are reluctant to abandon national efforts in this regard. A pattern of mismatch seems to emerge between EU initiatives on the one hand and the (lack of) explicit desire for the Europeanisation of national film promotional efforts on the other hand.

The perceived role of VOD platforms in the international promotion of national film industries

The proliferation of transnational, US-based VOD platforms such as Netflix, Prime Video, and Disney+, alongside the disruptions caused by the COVID-19 pandemic on cinema

admissions (Lobato 2019; Vlassis 2023), has significantly transformed the global film industry. This transformation has sparked divergent perspectives regarding the role of VOD platforms in promoting national and European film industry.

Streaming services have become one of the primary means of ensuring strong production capacities and global distribution for European films. This is clearly shown by France ranking as the largest exporter of films on VOD within Europe (Grece 2022). According to ICEX Spain Trade & Investment & Parrot Analytics (2024), France ranks fifth among the top five markets for global revenue generated from non-English content, placing itself as one of the leading European content markets: it follows Japan which tops the list, then South Korea, India and Spain. In addition, in France, between 2021 and 2023, VOD platforms' investments surpassed €974.6 million, with Netflix, Amazon Prime Video, and Disney+ accounting for €866 million of that total (Boxoffice Pro 2024; Goodfellow 2024). In Denmark, the expectation is that the combination of two relevant policies – levy and investment obligation (see Folketinget 2023) – will result in circa extra 100 million DKK (EUR 13.4 M) towards Danish content (NFTVF 2025). In Finland, it is estimated that if the obligation were implemented in the same way as in most other countries, a 3% obligation would generate €8.4 million, a 5% €14 million, and a 10% obligation €28 million (Kempainen 2024, 14).

Many interviewees highlighted that VOD services represent a key opportunity to promote the Finnish, Danish and French, and by extension European film industries on an international scale. Interviewees argued that the expansion of these services initially strengthened the competitiveness of European films by widening distribution possibilities and facilitating access to new audiences (Interview with FI8; Interview with FI9). The introduction of the EU's Audiovisual Media Services (AVMS) Directive, which requires on-demand services to allocate at least 30% of their catalogues to European works, was widely seen as a mechanism that could help European cinema benefit from the rapid growth of international streamers which have an interest in attracting audiences from different European countries (Interview with FI8).

Apart from the investment boost these services provide for local productions, the other main advantage is global access, which allows the reach of a wider audience and the exposure they offer to content that might otherwise lack a window of screening after leaving cinemas. These platforms are considered particularly advantageous for the dissemination of heritage films and documentaries, which may not have otherwise found an audience through traditional theatrical distribution (Interview with FR5 and FR6). 'You see the results of heritage films on platforms, for example. These are films that we wouldn't be able to make in cinemas. Platforms have completely revolutionized the economics of heritage films, for example, which used to be negligible. Now it's becoming important. And it's also an opportunity to win over new audiences' (Interview with FR5). It is worth mentioning here that French 'heritage films' are older cinematographic works, generally released in theatres more than 20 years ago, whose distribution and restoration are supported by institutions such as the CNC.

Interviewees widely agreed that regulating streaming services is essential to ensure these platforms contribute meaningfully to the European audiovisual ecosystem. This involves not only purchasing and co-producing content within national film industries but also actively promoting and increasing the visibility of Finnish, Danish, French, and more broadly, European films. As mentioned before, several participants observed that

while the EU retains some leverage in negotiations concerning VOD services, this influence has weakened over time (Interview with FI9). Many also emphasised the need for renewed EU-level discussions on intellectual property and distribution rights to counterbalance the dominance of large US-based streaming companies. These corporations often operate through buyout contracts that prevent European creators from sharing in the profits of commercially successful productions. In other terms, these platforms operate based on their own internal agendas, selecting films according to market-oriented criteria rather than actively promoting diverse content. While recognising these issues as challenging, Danish interviewees, in particular, also highlighted the importance of maintaining flexibility in EU directives to account for national differences.

Across the three countries, there was a shared perception that the content quotas established by the AVMS Directive no longer function as intended. Rather than stimulating new European productions or encouraging sustained investment, these quotas appear to have narrowed the market, directing resources toward major languages while the overall number of productions may be declining (Interview with FI8). 'Of course it's a bigger interest of Netflix to do a Spanish-speaking film than a Danish-language-speaking film, because the audience is too small' (Interview with DK8). Besides, streaming platforms operate according to stock market logics, making it difficult for small EU markets to regulate them on their own (Interview with DK5). Compounding this issue, the lack of transparency surrounding audience data on streaming platforms makes it difficult to assess how effectively European films reach viewers or how visibility has changed in the streaming era (Interview with FR1).

In response to these evolving dynamics, French institutions tasked with promoting national cinema abroad have adopted various strategies for engaging with VOD platforms. Based on interviews with key stakeholders, French authorities, for instance, view VOD services as constituting a secondary, distinct market. Accordingly, its strategic priority remains theatrical distribution, with digital platforms considered a supplementary promotional channel. This approach is predicated on the perception that a film's discoverability on digital platforms is significantly enhanced by the reputation it garners through theatrical exposure. The *Institut français*, in addition, has developed its own VOD initiative, *IFcinéma à la carte*, to facilitate broader access to French cinema. This free, non-commercial platform enables a wider distribution of French films through a curated catalogue. According to expert interviews conducted in 2024, the platform provides access to over 3,000 titles, enabling approximately 20,000 screenings annually across 180 countries (IFcinéma 2025). Similarly, the DFI supports Filmcentralen, the Danish Film learning platform and streaming site. It supports access to more than 2000 films, shorts, documentaries, series and feature films, as well as learning resources for students and teachers in primary, secondary schools and high schools.

Finally, despite general agreement on the need to strengthen the visibility of European film content, interviewees from Denmark, Finland and France expressed differing views on potential solutions – particularly regarding the idea of establishing a European VOD platform. While some considered a pan-European service a logical step toward improving access to European films, others doubted its effectiveness in addressing the core challenge of discoverability within international streaming markets. A Finnish representative noted that implementing such a platform would face significant practical and legal

obstacles. Ensuring that European films were available for streaming across all EU member states would require navigating complex copyright and licensing frameworks. Because film rights are typically negotiated on a national or regional basis, creating a unified platform would necessitate intricate agreements with multiple rights holders across jurisdictions – making the initiative difficult to realise in practice (Interview with FI1).

Concluding remarks

To conclude, in France, the scope of institutional practices remains both European and global, given the wide set of co-production agreements, based on a strong film diplomacy apparatus and on a neo-corporatist model balanced between state-led model and professional rationales (Depétris 2008). France distinguishes itself from its European counterparts through a structured institutional system that relies on the complementary functions of two key entities (Vlassis 2015): the diplomatic efforts of audiovisual attachés and the sector-specific expertise of Unifrance. This dual framework enhances the strategic reach of French cinema abroad by combining cultural diplomacy with targeted promotional capabilities, thereby offering France a comparatively greater capacity for international influence and visibility, a benefit that also extends to several European co-productions. French film promotion is based on a robust legal framework underpinned by this network of bilateral agreements and accomplishing diplomatic and industrial goals at the same time. On the other hand, the Nordic countries pursue a more flexible model, grounded in regional cooperation and institutional complementarity as an example of the 'transnational regional' (Steele 2015). In Denmark and Finland, the scope seems to be more regional and collaborative, focused on intra-Nordic cooperation and on the promotion of a Nordic film identity and based on a more decentralised policy model. However, besides these distinctive features, the co-production support policies adopted by France, Denmark, and Finland demonstrate a convergence of strategic objectives aimed at enhancing the visibility of their national film industries. These co-production agreements are a key part of the policy architecture of EU MS towards the development of their national film industries and function as economic, cultural, and often diplomatic instruments, enabling increased production capacities and expanded access to global markets.

In addition, the analysis reveals that the authority to establish audio-visual co-production agreements remains a fundamental prerogative of national governments, which have historically been protective of this domain against supranational intervention, particularly from institutions such as the European Commission. This sovereign control over film policy instruments reflects broader concerns regarding the preservation of national (film) identity and state autonomy in the film sphere. Notable examples also include the negotiations of the Protocol on Cultural Cooperation between the European Union and South Korea (Vlassis 2016), and the establishment of the Eurimages co-production fund (Mitric 2025) under the auspices of the Council of Europe – an inter-governmental organisation.

Moreover, interviewees from the three countries examined in the article acknowledged the importance of EU-level film cooperation and the benefits of certain common frameworks, not to mention the need for more concerted EU action. However, at the same time, they expressed scepticism about the potential for significantly deepening this cooperation in the

context of promoting European cinema. In the French case, where the state plays a prominent institutional role, the principle of complementarity between national and European levels is fundamental. In addition, interviewees focused more on the practical challenges of developing a shared agency and unified strategy. In the three countries, several interviewees expressed reservations about granting the European Union any additional binding powers in this domain, stressing the importance of national autonomy in cultural matters. In common, interviewees across the three case studies argued that European countries should leverage their individual promotional strengths, noting that the diversity of European national cinemas is often what makes them appealing internationally. There was also broad consensus that international promotion should remain primarily a national responsibility. This position is grounded in a desire to officially safeguard the diversity of European cinema, while also preserving the prerogatives of MS in film promotion. Finally, VOD platforms emerged as a point of contention. While acknowledging the production and distribution opportunities provided by VOD, several interviewees across the three case studies warned that these platforms may undermine existing support structures and disrupt the delicate balance of local film industries, arguing that, in the long-term, national action is not enough to avoid a race to the bottom and that more action from the EU is necessary regarding this topic.

Overall, our analysis underscores the enduring centrality of national public authorities in shaping film promotion abroad and the fact that this state of affairs is supported by film professionals and stakeholders. Indeed, it is noteworthy that the EU's cultural diplomacy policy (ICR) was not mentioned by interviewees in any of the countries surveyed. Despite the strengthening of film initiatives at the EU level and the recognised need for more concerted EU action to address challenges that cannot be solved by MS alone, in the case of film promotion both institutional and industrial actors converge in defining it as a national competence and affair. Interviewees generally expressed an interest in maintaining this relationship, although they used different rationales to justify this stance: cultural diversity (in all cases), national specificities and a strong tradition of film promotion (mostly in France but also in Denmark), and protecting the particularities of the Nordic model (Denmark and Finland). Paradoxically, by supporting the maintenance of film promotion as a national affair, film professionals and stakeholders in Denmark, Finland and France reveal a shared rejection of centralisation and uniformisation in this policy field. At the same time, they recognise that the increasing tension between the market power of international streamers made possible by technological shifts on the one hand and the national-centric architecture of film support structures in Europe on the other hand requires more concerted action at the European scale. Squaring the circle between these competing needs might require a redefinition of what is meant by film promotion.

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